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PeopleSoft

PeopleSoft HCM 9.2: PeopleSoft Human Resources Administer Workforce

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	*Description*
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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Chapter 1

Getting Started with Administer Workforce

Human Resources Administer Workforce Overview

PeopleSoft Human Resources (HR) Administer Workforce provides the foundation for your human resource management system. The data entered into the Administer Workforce business process is available to all of the Human Resources business processes as well as the other applications in the PeopleSoft HCM suite.

The Administer Workforce business process includes five basic steps:

1. Setting up the basic codes and formats needed for the business process.

   Before you begin tracking worker data, it's helpful to set up codes to help you streamline human resource processes for such areas as visas and permits, salary classifications, unions, banking, employment contracts, and checklists. Setting up these codes simplifies data entry and helps ensure that you have consistent information in records across all functions of your human resources system—from recruitment to benefits. If you're managing a workforce in Australia, Belgium, Canada, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States, you'll also set up any codes necessary for administering your workers in those countries.

2. Adding a person's human resources record into the system.

   When you bring a new person into your organization, create a record that includes this information:

   - Personal data, such as name, address, personal relationships, and organizational relationships, such as employee or contingent worker.
   - Job data, such as supervisor, department, job code, and compensation details.

3. Entering additional data into the record.

   In addition to the data that you enter when you add a new record, the data you can track includes:

   - Tenure with your organization.
   - Prior work experience.
   - Company property and credit cards issued to the employee.
   - Business expenses.
   - Emergency contact information.
   - Visas, passports, and other identification data.
   - Driver's license information.

- Bank accounts.
- Volunteer activities.
- Employee membership in unions, works councils, or labor agreements.
- Country-specific information for workers in Australia, Belgium, Brazil, Canada, France, Germany, Hong Kong, India, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States.

4. Updating the record.

   Over time, you'll need to enter changes to a person's human resources record, such as changes of name, address, marital status, and organizational status; promotions; transfers; and leaves of absence. You can also track employee grievances and disciplinary actions imposed on employees by your organization.

5. Viewing and reporting on worker data.

   You can view summary information about your workers and run a variety of different reports to review and analyze your workforce.

Related Links

“Understanding Manage Labor Administration” (PeopleSoft Human Resources Manage Labor Administration)

“Base Compensation and Budgeting” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

Human Resources Administer Workforce Business Processes

PeopleSoft HR Administer Workforce provides these business processes:

- Administer adding a person to the workforce.
- Manage workforce data.
- Administer country-specific functionality.
- Manage country-specific workforce data.
- (USF) Administer Personnel Action Requests and automatic actions.
- (USF) Manage leave.
- Manage workforce reporting.

We discuss these business processes in the business process topics in this documentation.

Human Resources Administer Workforce Integrations

PeopleSoft HR Administer Workforce integrates with these PeopleSoft applications:

- All PeopleSoft HCM applications.
- Other PeopleSoft applications.
- Other third-party applications.

We discuss integration considerations in the implementation topics in this documentation.

Human Resources Administer Workforce Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

PeopleSoft HR Administer Workforce also provides component interfaces to help you load data from your existing system into the Administer Workforce business process tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	***Component Interface***	***References***
CHKLST_ITEM_TBL	CI_CHKLST_ITEM_TBL	See Creating Checklists.
CNT_CLAUSE_TABLE	CNT_CLAUSE_TABLE	See Tracking Workforce Contracts.
SALARY_PLAN_TABLE	SALARY_PLAN	See “Setting Up Salary Plans, Grades, and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting).

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

Other Sources of Information

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

See the product documentation for

PeopleTools: Setup Manager

and *PeopleTools: Component Interfaces*

Related Links

Application Fundamentals

Chapter 2

Setting Up the Administer Workforce Business Process

Defining Personnel Actions and Reasons

To set up the Personnel Actions and Reasons tables, use the Actions (ACTION_TBL), FPS Action (FPMACTION_PNL2), Action Reasons (ACTION_REASON_TBL), and Action Reason Report (RUN_PER710) components.

These topics provide an overview of and discuss defining personnel action reasons.

Pages Used to Define Personnel Actions and Personnel Action Reasons

Page Name	***Definition Name***	***Usage***
Actions Page	ACTION_TBL_GBL	Define or review a personnel action code and its values.
Reason Summary Page	ACTION_TBL2	Display the list of reasons for a specific action code.
FPS Action Page	FPMACTION_PNL2	(French Public Sector). This page displays if you have French Public Sector selected on the Installation table. Use this page to assign the FPS components that can use the action code. This page is discussed in the PeopleSoft Human Resources Manage French Public Sector documentation.
Action Reasons Page	ACTRSN_TBL_GBL	Define personnel action reasons or modify existing action reasons.
Action Reason Table Page	RUN_PER710	Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action.

Understanding Personnel Action Reasons

In the course of maintaining information in the Administer Workforce business process, you'll enter changes to worker data resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence. Each of these activities is called a *personnel action,* and you use them to enter and update employee data on the Job Data - Work Location page and the Data Control page. The codes classifying the types of personnel actions that you'll perform are stored in the Actions table.

You'll often have different reasons for performing the same type of personnel action for workers. For example, you could enter the action *leave of absence* for one person for maternity or paternity leave, for another person because of military service obligations, and for yet another person for health reasons.

So that you can easily identify the causes of changes made to worker data, you can designate reasons for taking personnel actions. The Human Resources system already contains some reasons for actions, but you'll probably want to add others that apply specifically to your company. To do so, use the Action Reasons page.

Note: The PeopleSoft application delivers various actions and action reason codes. You should be familiar with the rules associated with the action and take into consideration the benefit statuses associated with in the action reasons when determining which action and reason codes are best for your organization.

Note: To view a complete list of all actions and reasons already defined within the system, generate the Action Reason Table report (PER710).

Positions and Action Reasons

If you're driving part or all of PeopleSoft Human Resources by position, you'll want to enter reasons for changes to position data also (on the Position Data 1 page). For example, you might enter a personnel action of *Position Change* because of a reorganization of your company; a change in position title; a job reclassification; or, when you transfer employees to other positions, you need to change the position numbers (and related data) assigned to them.

To add action reasons pertaining to position change actions, use the action code *POS* (position change).

Global Assignments and Action Reasons

If you send workers on global assignments, you'll probably want to identify reasons for the assignments (on the Home/Host Data page). For example, you might process some assignments that are due to a transfer of skills and others due to a local shortage of skilled personnel. To track assignment types more easily, you'll find it helpful to specify reasons for them.

To set up reasons specific to global assignments, use the action codes *ASG* (assignment) and *ASC* (assignment completion).

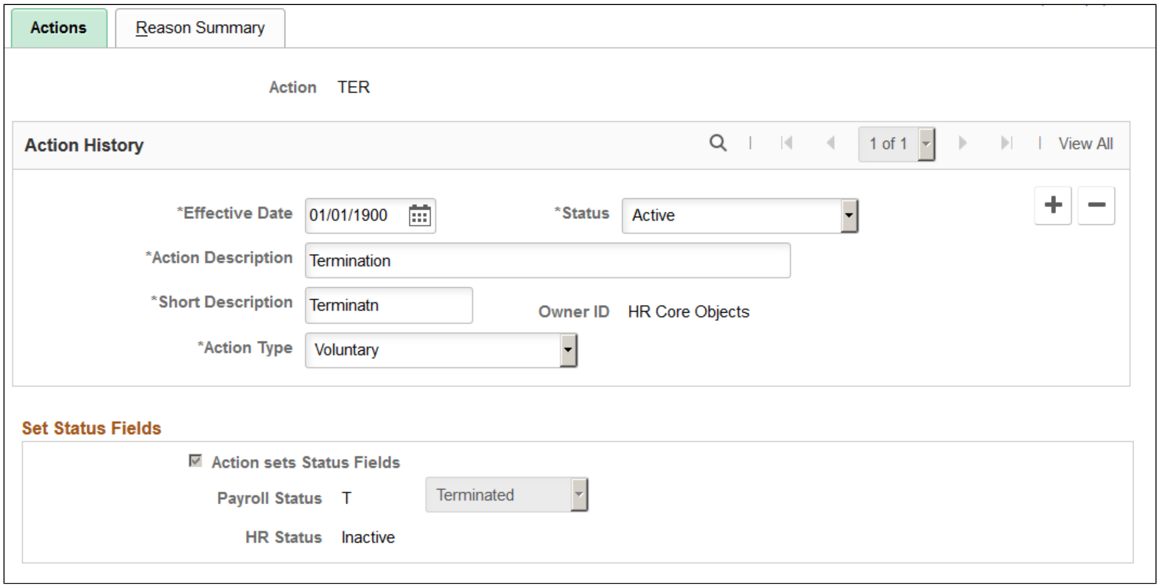
Actions Page

Use the Actions page (ACTION_TBL_GBL) to define or review a personnel action code and its values.

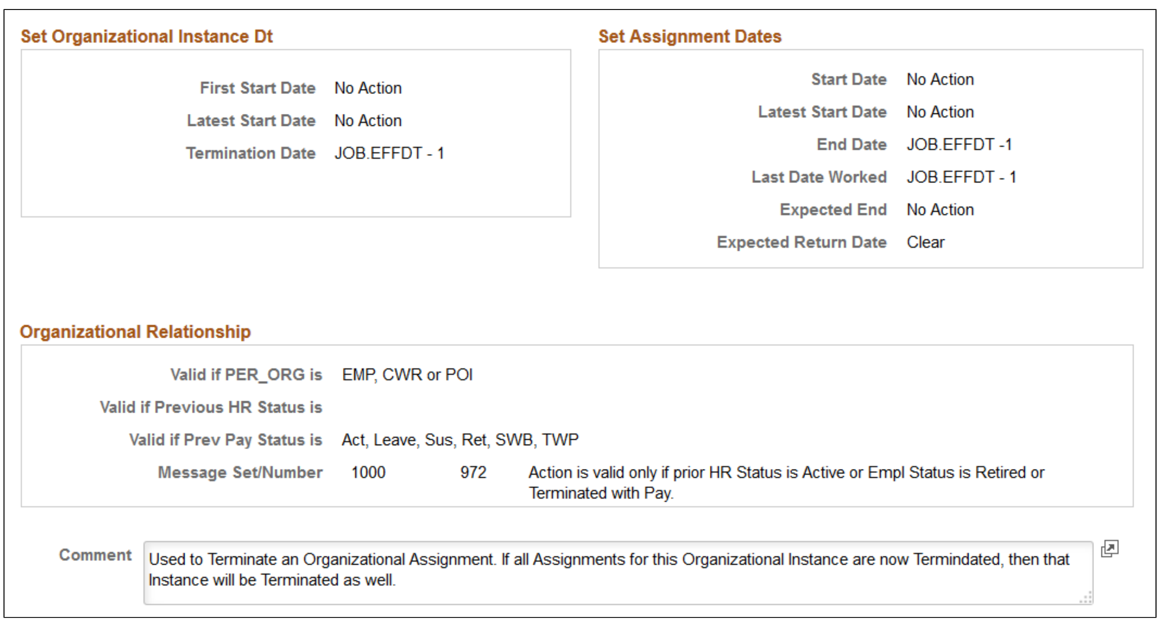
Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Job Actions** > **Actions**

This example illustrates the fields and controls on the Actions page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Actions page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Action Type	Select to indicate if this is a *Voluntary* or *Involuntary* action. The *Voluntary* value is provided by default but you can override this value. When you create an Action Reason code on the Action Reasons Page, the value entered here for the action will be provided as the default value for the reason.

Set Status Fields

Field or Control	***Description***
Action sets Status Fields	Select this check box to identify actions that cause changes to **Status** and **Date** fields for the person receiving this action. When this check box is selected, the **Set Organizational Instance Dt** and **Set Assignment Dates** regions, as well as the other fields in the **Set Status Fields** region, are displayed.
Payroll Status	Select the payroll status (EMPL_STATUS) of the person receiving this action. Values are: *Active, Deceased, Leave With Pay, Leave of Absence, Retired, Retired With Pay, Retired-Pension Administration, Short Work Break, Suspended, Terminated, Terminated Pension Pay Out,* and *Terminated With Pay.*
HR Status	Identifies the status of the person receiving this action for HR purposes.

Set Organizational Instance Dt (Set Organizational Instance Date)

Field or Control	***Description***
First Start Date and**Latest Start Date**	Select the action table value to use when this action causes the job record for a person to be updated. The **First Start Date** is the first date that this instance is active for a person receiving this action. For example, in an employee relationship, this is the Hire Date. The **Latest Start Date** is the latest date that this instance was renewed. For example, in an employee relationship, this is the re-hire date. The HIR or ADD actions modifies both the **First Start Date** and the **Latest Start Date** to the effective date of the Job row. On a Rehire or Renew action, only the Latest Start Date is changed. These dates are only captured on the organizational instance level, not for additional assignments. The values are: *JOB.EFFDT* and *No Action.*
Termination Date	Select the action table value used to determine how to set the termination date for an assignment. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

Set Assignment Dates

Field or Control	***Description***
Start Date	Select the action table value used to determine how to set the date on which an individual assignment starts. The Hire (HIR), Add Contingent Worker (ADD), and Add Person of Interest (POI) actions, as well as the Additional Job (ADL) and Assignment (ASG) actions, set this value The values are: *JOB.EFFDT* and *No Action.*
Latest Start Date	Select the action table value used to determine how to set the date on which an individual assignment is restarted. The Rehire (REH) and Renewal (RNW) actions, as well as all the actions that set the start date, set this value. The values are: *JOB.EFFDT* and *No Action.*
End Date	Select the action table value used to determine when an assignment is stopped. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*
Last Date Worked	Select the action table value used to determine the last date that the person was actively working prior to a termination or a leave action. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*
Expected End	Select whether or not to clear the expected end date on the job record. The values are: *Clear* and *No Action.*
Expected Return Date	Select whether or not to clear the expected return date on the job record. For example, when a person goes on temporary leave. When the person returns from leave, the expected return date should be cleared. The values are: *Clear* and *No Action.*

Organizational Relationship

Field or Control	***Description***
Valid if PER_ORG is	Indicate whether this action is valid only for certain organizational relationships. Values are: *Contingent Worker Only, Contingent Worker or POI, EMP, CWR, or POI, Employee Only, Employee or Contingent Worker,* or *Person of Interest Only.*

Field or Control	***Description***
Valid if Previous HR Status is	Indicate that this action is only valid if the job assignment is in the selected HR status. For example, an action of HIR cannot be entered if the prior HR Status is Active. The values are: *Active* and *Inactive.*
Valid if Prev Pay Status is (Valid if Previous Pay Status is)	Indicate that this action is only valid if the job assignment is in the selected status. For example, a return from leave action can only be entered if the previous pay status in a Leave status. The values are: *P/L – Any Leave, P/L – Disability Leave, S – Suspended,* and *W – Short Work Break.*
Message Set/Number	Choose the **Message Set Number** and **Message Number** to determine the error message used for the **Valid if Previous HR Status is** or **Valid if Prev Pay Status is** settings.

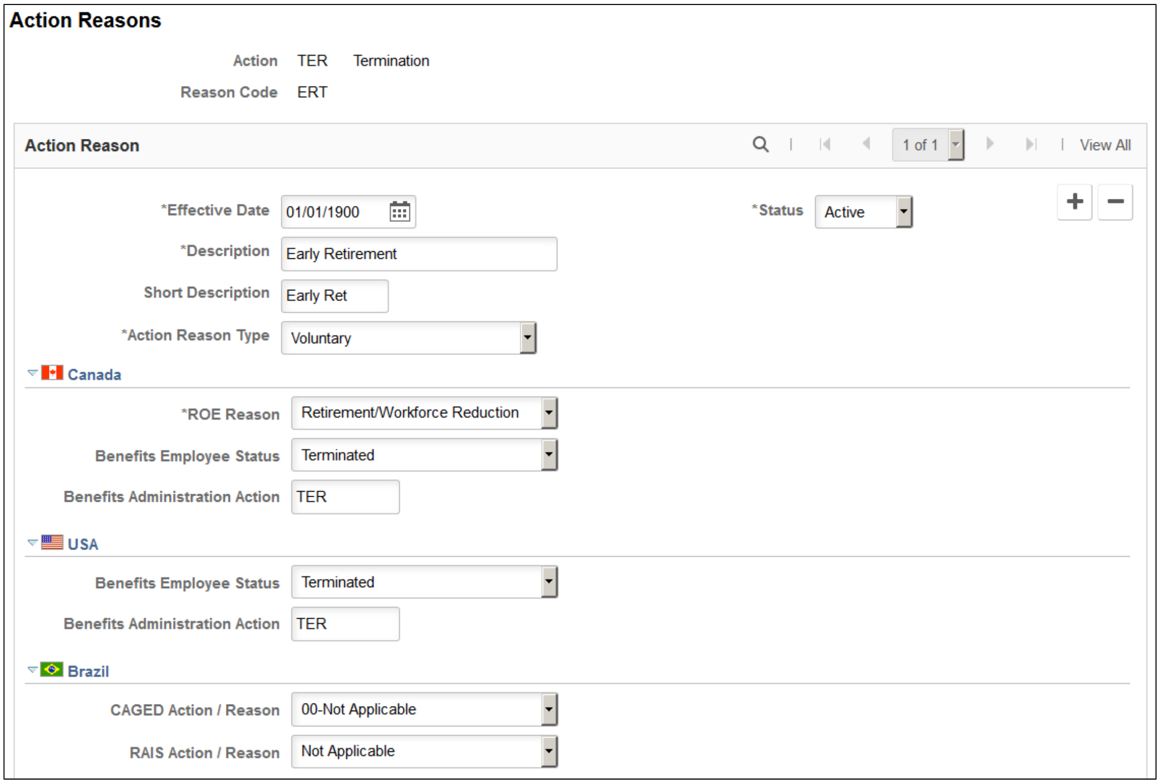
Action Reasons Page

Use the Action Reasons page (ACTRSN_TBL_GBL) to define personnel action reasons or modify existing action reasons.

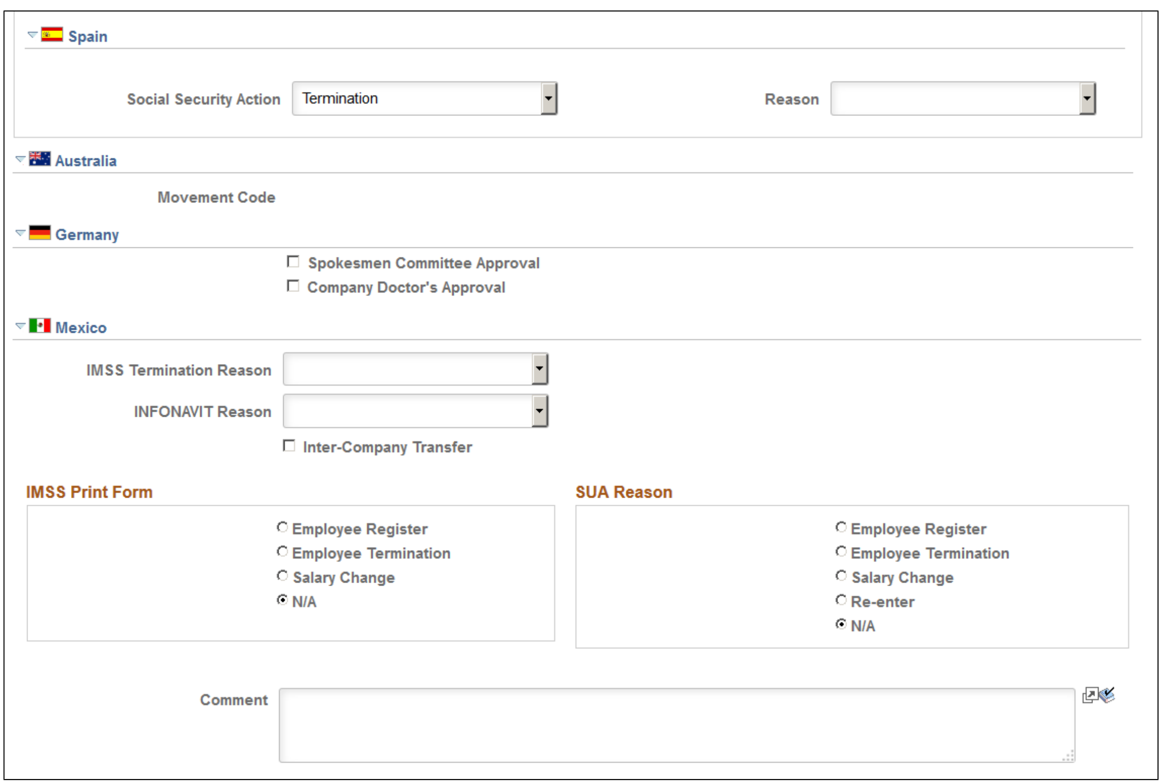
Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Action Reasons** > **Action Reasons**

This example illustrates the fields and controls on the Action Reasons page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Action Reasons page (2 of 2). You can find definitions for the fields and controls later on this page.



Note: Effective-dated fields include the description and status as well as country-specific sections for Canada, USA, Brazil, and Spain. Other fields on this page, including the comments and the sections for Australia, Germany, and Mexico are not effective dated.

Field or Control	***Description***
Action Reason Type	Select to indicate if this is a *Voluntary* or *Involuntary* action reason. The default value for this field is provided from the **Action Type** field on the Actions Page for this action, but you can override this value.

(CAN) Canada

Field or Control	***Description***
Canadian ROE Reason (Canadian record of employment reason)	Select a Canadian ROE reason, such as *Return to School* or *Pregnancy.* Valid values are defined by the Canadian government.
Benefits Employee Status	Select the status associated with this action.
Benefits Administration Action	If a particular action and reason code combination affects benefits in some way, enter the PeopleSoft Benefits Administration event classification for that combination in the Benefits Administration Action field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action.

(USA) United States

Field or Control	***Description***
Benefits Employee Status	Select the status associated with this action.
Benefits Administration Action	If a particular action and reason code combination affects benefits in some way, enter the PeopleSoft Benefits Administration event classification for that combination in the **Benefits Administration Action** field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action.

(BRA) Brazil

Field or Control	***Description***
CAGED Action / Reason (Cadastro Geral de Empregados e Desempregados action/reason)	Enter the type of CAGED entry to report for actions with this reason.
RAIS Action / Reason (Relação Anual de Informações Sociais action/reason)	Enter the type of action to report to RAIS for actions with this reason.

(ESP) Spain

Field or Control	***Description***
Social Security Action	Select the social security action associated with this action reason.

(AUS) Australia

Field or Control	***Description***
Movement Code	Select the appropriate Public Service Merit Protection Commission (PSMPC) movement code for the employment status change.

(DEU) Germany

Field or Control	***Description***
Spokesmen Committee Approval	Select this check box as an action reason, if applicable.
Company Doctor's Approval	Select this check box, if relevant, for this action reason.

(MEX) Mexico

IMSS requires a notification for every hire, termination, and salary rate change. Once you've defined the details, these notifications are generated automatically by the system.

Field or Control	***Description***
IMSS Term	Select the reason for termination. Values are: *Agreement, Collective Termination, Employee Death, Employee Transfer, Inability, Lay-off, Leave, Mental or Physical Disability, N/A, Pension-Off, Retirement, Voluntary Renounce,* and *Work Risk Disability.*
INFONAVIT Reason	Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Values are: *Death, Disability, Disengage, Never Work, Other, Retirement,* and *Transfer.*
Maintain Variable SDI	Select this check box to maintain variable SDI.
Inter-Company Transfer	Select this check box to indicate that the action and reason code combination is valid for processing of inter-company transfers in Global Payroll for Mexico. The Inter-Company Transfer Application Engine process (GPMX_INTERC) triggers for processing only the action and reason code combinations that you indicate by selecting this check box.
IMSS Print Form	Select the reason for a change in a worker's information. This is done to notify IMSS when an person is hired, rehired, terminated, or has a salary change. Values are: *Employee Register, Employee Termination, Salary Change,* and *N/A* (not applicable).
SUA Reason	Select the reason that gets printed on the SUA notification. Values are: *Employee Register, Employee Termination, Salary Change, Re-enter,* and *N/A* (not applicable).

Related Links

PeopleSoft Human Resources Manage Labor Administration

(USF) Defining Award Actions

To set up the (USF) Award Actions tables, use the Award Actions (GVT_AWD_ACTN), and Award Type Table (RUN_FGPER810) components.

This topic discusses how to set up award actions.

Pages Used to Define Award Actions

Page Name	***Definition Name***	***Usage***
Award Actions Page	GVT_AWD_ACTN	Define award codes for monetary and nonmonetary awards types.
Award Type Table Page	PRCSRUNCNTL	Run the Award Type table report (FGPER810).

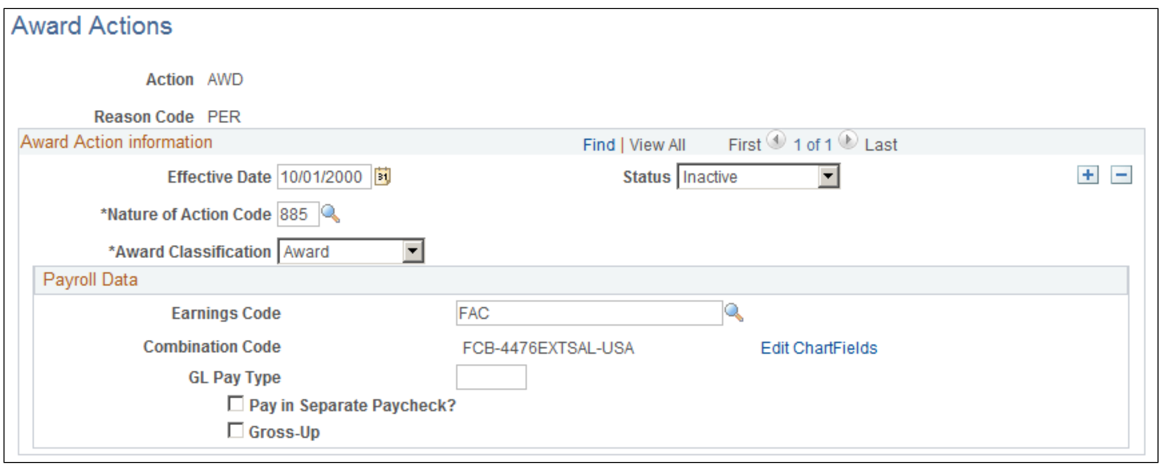
Award Actions Page

Use the Award Actions page (GVT_AWD_ACTN) to define award codes for monetary and nonmonetary awards types.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data USF** > **Define Award Actions USF** > **Define Award Actions USF**

This example illustrates the fields and controls on the Award Actions page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Nature of Action Code	Enter the reason associated with this award action.
Award Classification	Select the award classification, either *Award* or *Bonus.*
Award Code	Enter the NFC-defined code that identifies the bonus or award. The entry in this field becomes the default value on the Award Data page for this action reason and is read only.

Payroll Data

Field or Control	***Description***
Earnings Code	Select an earnings code to associate with this award action.
Combination Code and**Edit ChartFields**	Displays the key that defines a combination of ChartFields. Click the **Edit ChartFields** link to access the ChartFields Details page.
GL Pay Type (general ledger pay type)	Select the pay type to associate with this award action.
Pay in Separate Paycheck?	Select if this award action should be paid in a separate check.
Gross-Up	Select to indicate the award or bonus amount must be grossed-up for payroll purposes.

NFC Populate Amount Indicator

Field or Control	***Description***
Not Applicable or**Populate Amount**	The default selection is **Not Applicable.** Select **Populate Amount** to define a relocation or recruiting bonus that is granted to an employee though a personnel action: • For a relocation bonus, this setting triggers the system to populate the *GVT_NFC_RELBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REL* (relocation). • For a recruiting bonus, this setting triggers the system to populate the *GVT_NFC_RECBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REF* (referral). **Note:** These fields are not visible to the user.

Related Links

Award Data Page

Setting Up Smart HR Templates

To set up Smart HR templates, use the Smart HR Template Record/Field (HR_TBH_RECDEFN), Template Section (HR_TBH_SECDEFN), Smart HR Transaction Type (HR_TBH_TXN_TBL), Copy Smart HR Transaction Type (HR_TBH_COPY_TXN), Smart HR Template Creation (HR_TBH_CREATION), Copy Smart HR Template (HR_TBH_COPY), and Smart HR Category Table (HR_TBH_CTG_TBL) components.

These topics provide an overview of Smart HR Templates, list common elements used to setup up Smart HR templates, and discuss setting up Smart HR templates.

Pages Used to Set Up Smart HR Templates

Page Name	***Definition Name***	***Usage***
Template Record/Field Page	HR_TBH_RECDEFN	Set up and maintain the records and fields to be used in the Smart HR transaction templates. The records/fields that should be available to be included in the templates will be stored in the Template Record Setup Table (HR_TBH_RECDEFN) and Template Field Setup Table (HR_TBH_RECDTL). The Template Record Setup Table contains one row for each table currently included in the core Hire process with at least one enterable field (except for tables with multiple instances, such as phone numbers, email addresses, and so forth, where more than one row exists). It also contains views of the Profile Management tables.
Template Section Page	HR_TBH_SECDEFN	Identify and configure sections, and list and configure the fields contained in a section.
Template Section Field Configuration Page	HR_TBH_SECDTL	Add additional user exit information for field changes and field prompts.
Template Category Table Page	HR_TBH_CTG_TBL	Set up template categories for grouping templates and for row-level security.

Page Name	***Definition Name***	***Usage***
Smart HR Transaction Type - Transaction Type Page	HR_TBH_TXN_TBL	Define template transaction types that identify the function of a template and the application class ID and path to specify the location of the implementation code for the transaction type. Transaction types can also be used to determine which users have security access to a template.
Smart HR Transaction Type - Components Page	HR_TBH_TXN_CMP	Identify which components will be updated when the end user or HR administrator saves the data to HR during the Smart HR Transactions process.
Transaction Component Details Page	HR_TBH_TXN_SEC	Specify label details related to a component. The Manage Hire and Manage Transactions Details pages display the labels you enter on this page for the HR administrator to manage transactions that require attention.
Smart HR Transaction Type - Sections Page	HR_TBH_TXN_SCT	Define which sections should be available to a template when it uses this transaction type. Valid values come from the Template Section table.
Copy Transaction Type Page	HR_TBH_COPY_TXN	Copy a template transaction type.
Smart HR Template Creation - Template Creation Page	HR_TBH_TMPL_HDR	Create and modify templates.
Smart HR Template Creation - Configuration Page	HR_TBH_TMPL_CFG	Set up general options and the search page configuration for a template.
Section Field Label Override Page	HR_TBH_TMPL_FLDL	Change a field label by selecting another text ID for the field.
Section Field Default Value Page	HR_TBH_TMPL_FLDC	Identify a default value for the field that will appear for the end user to assist with data entry for fields that would often use the same value.
“Maintain Text Catalog Page” (Application Fundamentals)	HR_SSTEXT_TEXT	Define text catalog entries, and define the values for context-sensitive keys.

Page Name	*Definition Name*	*Usage*
Smart HR Template Creation - Pages Page	HR_TBH_TMPL_PAG	Set up the page number order and tab names that should appear on the Smart HR Transaction pages.
Define Tab Detail Page	HR_TBHTAB_DTL_SEC	Identify the page names on the Smart HR Transaction pages.
Smart HR Template Creation - Sections Page	HR_TBH_TMPL_SEC	Add and configure template sections.
Template Section Configuration Page	HR_TBH_TMPL_FLDS	Configure the fields for a section within the template.
Smart HR Template Creation - Person Rules Page	HR_TBH_TMPL_PER	Enable or disable Search Match functionality for a template and define options for handling existing person data and employment instances in the database.
Copy Template Page	HR_TBH_COPY	Copy a Smart HR template and make modifications to the new template.

Understanding Smart HR Templates

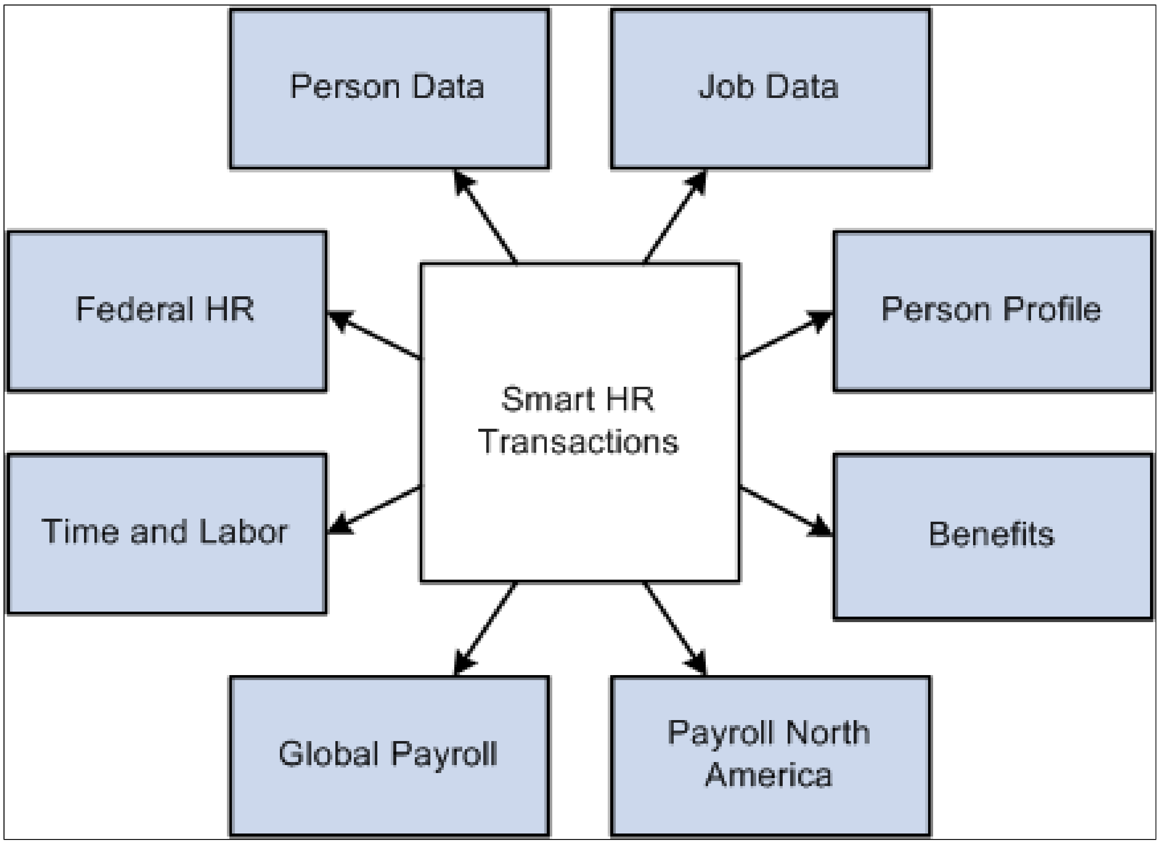
Smart HR templates are a simplified and streamlined approach to completing various transaction processes, such as hiring, updating a person's personal or job data, or managing a person's profile data. Smart HR templates are created and configured by the template administrator, someone who is very familiar with your organization's HR transaction processes. After the template administrator has created and tested templates, line managers or human resources (HR) representatives can use these templates for hiring, managing personal or job data or maintain profile information. Access to the various Smart HR transaction templates is based on the security rules that you establish.

The template administrator determines the following aspects of each transaction template:

- The sections, or logical groupings of fields, that are included in a transaction type and template, as well as the sequence in which the sections appear of the template pages.
- The sequence of fields within a section.
- Default values for fields.
- Hidden fields.
- Display-only fields.
- If data entered by the end user can be directly submitted for processing or must be reviewed by an HR administrator.

The template administrator can test a template by performing a mock transaction, like a hire, without actually applying the transaction to the system.

This diagram shows the integration between the Smart HR template process and other products. Template administrators can create templates that enable the user to enter or update person, job, or profile data. This data populates the person, job, and profile records in the core HR and federal HR systems, and it provides default values for the PeopleSoft Benefits, Global Payroll, Payroll for North America, and Time and Labor applications:



Smart HR Template Security

Implement security for the Smart HR template and transaction components using PeopleTools permission lists and roles. This table lists the role, permission list, and components:

Role	***Permission List***	***Components***
HR Template Setup	HCCPHR3321	HR_TBH_RECDEFN HR_TBH_SECDEFN HR_TBH_TXN_TBL HR_TBH_COPY_TXN

Note: The template setup components have no row-level security.

Implement security for using the Smart HR templates through the existing Human Capital Management row-level security. Smart HR templates use the following fields for security: **Template ID, Organizational Relationship** *(Employee* or *Contingent Worker),* **Transaction Type, Country,** and **Category.**

See Understanding Smart HR Templates.

See “Understanding PeopleSoft Security” (Application Fundamentals)

Delivered Smart HR Template Sections

The fields available for templates are grouped into sections, like group boxes. For example, you may have a Work Location - Job Fields section that includes fields to enter a company, department, and location code. You can determine which sections and the order in which the sections should be presented to the end user when creating a Smart HR template. Sections and their fields are delivered as system data. Sections are maintained in the Template Section component **(Set Up HCM > Product Related > Workforce Administration > Smart HR Templates > Smart HR Template Section).** These delivered sections can be modified within your templates to suit your organization's needs for hiring.

The following table lists the delivered Personal Data sections used for template creation:

Section Number	***Section Name***	***Countries with Country Specific Sections***
10	Name	BEL, BRA, CHE, CHN, DEU, ENG, ESP, FRA, HKG, ITA, JPN, MEX, and NLD
20	Birth Information	
40	Data Protection	
50	Gender	
60	Education	
70	Person Marital Status	
80	Language	
85	Person Student Status	
90	Alternate ID	

Section Number	***Section Name***	***Countries with Country Specific Sections***
100 – 108	National ID	AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, IRL, ITA, JPN, MEX, MYS, NLD, SGP, THA, and USA
120 – 121	Address	AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, ITA, JPN, MEX, MYS, NLD, NZL, SGP, and USA GBL (global address)
125–128	IM Chat	
130 – 133	Personal Phone	
135 – 136	E-mail Address	
140	Ethnic Group	AUS, CHN, MYS, NZL, SGP, and THA
145	Religion	AUS, CHN, MYS, NZL, SGP, and THA
147	Person Hukou Data – China	CHN
148	Person Working Life – China	CHN
150	Person Smoker Status	CAN, JPN, and USA
210	General Registration – Brazil (Registro Geral)	BRA
211	CTPS – Carteira de Trabalho e Previdencia Social	BRA
212	Voter Registration – Brazil	BRA
213	Military Registration – Brazil	BRA
214	PIS/PASEP	BRA

Section Number	***Section Name***	***Countries with Country Specific Sections***
220	Diversity	CAN
221	Health Care	CAN
230	Guardianship	CHE
231	Place of Origin	CHE
240	HR Responsibility	DEU
241	Military Status	DEU
242	Nationality	DEU
260	Personal Data – France	FRA
270	Diversity	GBR
280	Diversity	IND
290	Military Status	ITA
300	Honseki Prefecture	JPN
310	Personal Data – Mexico	MEX
320	Diversity	USA
330	Personal Data – United States	USA

The following table lists the delivered Job Data sections used for template creation:

Section Number	***Section Name***	***Countries with Country Specific Sections***
400	Work Location – Job Indicator	

Section Number	***Section Name***	***Countries with Country Specific Sections***
410	Work Location – Position Data	
420	Work Location – Expected Job End Date	
430	Work Location – Job Fields	
431	Work Location – Spain	ESP
432	Work Location – Japan	JPN
435	Work Location – Military	
440	Job Information – Job Code	
450	Job Information – Reporting Information	
460	Job Information – Status	
470	Job Information – Employee Classification	
480	Job Information – Shifts	
490	Job Information – Standard Hours	
500	Job Information – Contract	
505	Job Information – Military	
510	Job Information	AUS, BEL, BRA, DEU, ESP, FRA, GBR, ITA, MEX, MYS, NLD, and USA
511	Job Information – Australian Higher Education	AUS
520	Job Labor – Bargaining Unit and Labor Agreement	

Section Number	***Section Name***	***Countries with Country Specific Sections***
530	Job Labor – Employee Categories	
540	Job Labor – Union Code	
550	Job Labor – Exemptions	
560	Job Labor	DEU, ESP, FRA, IND, and ITA
570	Payroll – Payroll System	
580	Job – Absence System (Payroll)	
590	Payroll – Payroll Information	
600	Job – Global Payroll/Absence Information	
610	Payroll – Balance Group Number	AUS, HKG, MYS, NZL, and SGP
620	Job – Salary Plan	
625	Military (Salary Plan)	
630	Job Compensation – Payroll Currency and Frequency	
640	Job Compensation – Auto Calc Premium	
650	Job Compensation – Pay Components	
660	Employment Information – Original Start Date	
670	Employment Information – Organizational Assignment Data	
675	Employment Information – Military	

Section Number	***Section Name***	***Countries with Country Specific Sections***
680	Employment Information – Additional Data	
690	Employment Information	BEL, BRA, CAN, JPN, NLD, and USA
690	Festive Advance	MYS and SGP
691	Employment Information – E & G	CAN and USA
700	Benefit Program – Benefit Record Number	
710	Benefit Program – Benefit Status	
720	Benefit Program – Ben Admin Eligibility	
730	Benefit Program – Participation	
740	Benefits Affordable Care Act Eligibility	USA
740	Time Reporter Status	
750	Time Reporter Type	
760	Time Reporter IDs	
770	Time Reporter Type – Rule Elements	

(USF) The following table lists the delivered Federal sections used for template creation:

Section Number	***Section Name***	***Industry Specific Section Type***
10	Data Control Dates & Action	Federal
20	Data Control Codes	Federal
30	Data Control PAR Request	Federal

Section Number	***Section Name***	***Industry Specific Section Type***
40	Data Control PAR Remarks	Federal
41	Data Control PAR Remarks	Federal
42	Data Control PAR Remarks	Federal
43	Data Control PAR Remarks	Federal
44	Data Control PAR Remarks	Federal
50	Tracking Data	Federal
60	Name	Federal
70	Gender and Other Personal Data	Federal
80	Citizenship Status	Federal
90	National ID	Federal
100	Additional Birth Information	Federal
110	Home Address	Federal
111	Mailing Address	Federal
121	Personal Phone Number 01	Federal
122	Personal Phone Number 02	Federal
123	Personal Phone Number 03	Federal
124	Personal Phone Number 04	Federal
130	Veterans Information	Federal
140	Marital Information	Federal

Section Number	***Section Name***	***Industry Specific Section Type***
150	Education Details	Federal
160	Position Number	Federal
170	Job Data	Federal
180	Position Data	Federal
190	Compensation	Federal
200	Compensation - Quoted Pay	Federal
210	Other Pay Information	Federal
220	Accounting Information	Federal
230	Dates	Federal
240	Expiration Dates	Federal
250	Appointment Data	Federal
260	Service Computation Dates	Federal
270	Service Conversion Dates	Federal
280	Within-Grade Increase Data	Federal
290	Union Data	Federal
300	Permanent Data RIF	Federal
310	Probation Dates	Federal
320	Retained Grade Expires	Federal
330	Non-Pay Data	Federal

Section Number	***Section Name***	***Industry Specific Section Type***
340	Security Information	Federal
350	Benefits System	Federal
360	Benefits Control	Federal
370	Benefits Administration Eligibility	Federal
380	FEHB Eligibility	Federal
390	FEHB Date	Federal
400	NFC Benefits Coverage	Federal
410	FEGLI Data	Federal
420	Retirement Data	Federal
430	FICA Status	Federal
440	NFC Military Service Deposit	Federal
450	Time and Labor - Reporter Status	Federal
460	Time and Labor - Reporter Type	Federal
470	Time and Labor - Reporter Ids	Federal
480	Time and Labor - Rule Elements	Federal

The following table lists the delivered Manage Profile sections used for template creation:

Section Number	***Section Name***	***Countries with Country Specific Sections***
805	JPM Competencies	
806	JPM Responsibilities	

Section Number	***Section Name***	***Countries with Country Specific Sections***
810	JPM Honors and Awards	FRA
811	JPM Language Skills	
812	JPM Licenses and Certifications	
813	JPM Memberships	
814	JPM Tests	
815	JPM School Education	
816	JPM Degrees	AUS, DEU, and JPN
817	JPM Areas of Study	
818	JPM Special Projects	E&G
819	JPM Current Location	
820	JPM Location Preferences	
821	JPM Geographic Preferences	
822	JPM International Preferences	
823	JPM Travel Preferences	

As the template administrator, you can use the section label name listed, or create a text catalog entry for those fields in which you want to change the label.

Required and Recommended Sections within a Hire Template

These sections are required when creating a hire template:

- NAME_01_*xxx* (Names) - where *xxx* is the country code.
- BIRTH_INFO (Birth Information)
- GENDER (Gender)

- JOB_PAYROLL_SYSTEM (Payroll System)

Note: The Name, Birth Information, and Gender sections are sequentially listed before the National ID section. Oracle highly recommends that you keep this order in the PeopleSoft Smart HR template for the National ID validations to work properly for certain countries.

Oracle recommends that these sections be included in the PeopleSoft Smart HR hire template:

- WORK_LOC_JOB_FLDS (Work Location - Job fields)
- JOB_ABSENCE_SYSTEM (Absence System)
- JOB_PAYROLL_INFO (Payroll Information)
- JOB_COMP_PAY_CMPNT (Job Compensation - Pay Components) or JOB_SALARY_PLAN (Job - Salary Plan)
- BEN_PROG_BEN_STAT (Benefit Status)

Multiple Instances of an Element in a Template

The Template Record Setup table contains one row for each table currently included in the core hire process with at least one enterable field. However, there are some tables with multiple instances, such as phone numbers, email, addresses, and so forth, where more than one row exists. The system supports the use of these multiple elements in hiring templates. This way you are able to maintain more than one address section in a hiring template for different countries or multiple pay elements.

Note: If you need to have multiple instances of information in a template, such as names, addresses, or compensation, you need to specify a unique record alias for each additional instance.
For example, to add multiple pay components, rather than adding multiple copies of the same compensation section in a template, you must first create a new record and record alias, such as COMPENSATION1, and then add the fields from the original compensation record to your newly created record.
In addition, each template section must use a unique record alias. For example, if you need two address sections in your hiring template, one for addresses in Australia and another section for addresses in Brazil, selecting ADDRESS_01_AUS and ADDRESS_01_BRA can cause errors since both template sections use the ADDRESSES_01 record alias. In this example you should use a different address alias selection, such as ADDRESS_01_AUS and ADDRESS_02_BRA.
An alternative to creating multiple sections with different record instances, the section on the template can be specified as a grid section. On the grid section, the record instances will automatically be added behind the scenes and will correspond to the row number.

Troubleshooting Templates

During a Smart HR transaction of a hire, if a hire transaction for a person uses a past effective date and the hire fails, check the **Default Benefit Program** and default **Pay Group** values for the organization and make sure they are the correct. When the benefit system is Base Benefits or Benefits Administration, the benefits code invoked during a hire requires a default benefit program to be set on the Pay Group Table.

1. Check the **Default Benefit Program** value on the Pay Group table and make sure it has the correct value.

2. Check the **Pay Group** value on the Company table and make sure it has the correct default Pay Group value.

Common Elements Used to Set Up Smart HR Templates

Field or Control	***Description***
Template	A pre-configured template that enables end users to enter a subset of the data required for a transaction, such as a hire, update to personal data, or update to a profile. Other data is pre-entered by the template administrator during the template creation process.
End user	For the Smart HR Template process, the end user is typically a line manager or HR (Human Resources) representative in the field. This person is usually not familiar with the details of the hiring process. Whenever complex issues arise, the process is handed over to a centralized HR administrator.
HR administrator	The HR administrator is somebody who knows the hiring process very well and can easily deal with any level of complexity. This person reviews the data entered by end users and takes over the hiring process whenever errors occur or issues arise.
Template administrator	The person in your organization who knows the hiring process very well (may be an HR administrator). The person assigned this role sets up and maintains hiring templates to be made available to end users.
Implementer	For the Smart HR Template process, the implementer is typically an IT (Information Technology) specialist who works closely with the HR administrator and template administrator to review the delivered template records/fields and sections and modifies them, if necessary.
Template section (or section)	The fields available for the templates will be grouped into sections. For example, the Work Location section will include the following fields (all on the Job record): **Regulatory Region, Company, Business Unit, Department, Department Entry Date, Location,** and **Establishment ID.** Sections are the building blocks for creating templates, not the individual records/fields. PeopleSoft delivers these sections as system data, but the implementer can modify them, delete them, or add new sections.
Template page (or pages)	The dynamically generated data entry page visible to the end user, consisting of one or more template sections. The template administrator decides whether the sections are displayed in one long page or divided into smaller pages.

Field or Control	***Description***
Template Transaction Type	The template administrator assigns each template to a template transaction type. Template transaction types identify the function of a template and the application class ID and path to specify the location of the implementation code for the transaction type. Transaction types can also be used to determine which users have security access to a template.
Person/Job Indicator	The template administrator identifies if a transaction type will include changes to personal data, job data, both, or neither.
Template category	The template administrator assigns each template to a category. The category provides row-level security for a template and can be used to group templates. A category may represent a specific department, location, business unit, region, and so forth.
Auto-updates	Determines whether data entered by the end user can be directly submitted for processing (auto-updating is turned on) or will need to be reviewed by an HR administrator (auto-updating is turned off). This auto-update functionality is set by the template administrator (the end user is not able to change it).
Search match parameters	The template administrator can associate a search match rule with a template to determine if the person already exists in the system. This search is done in the background and the results are displayed using the Search Match Results page.

Template Record/Field Page

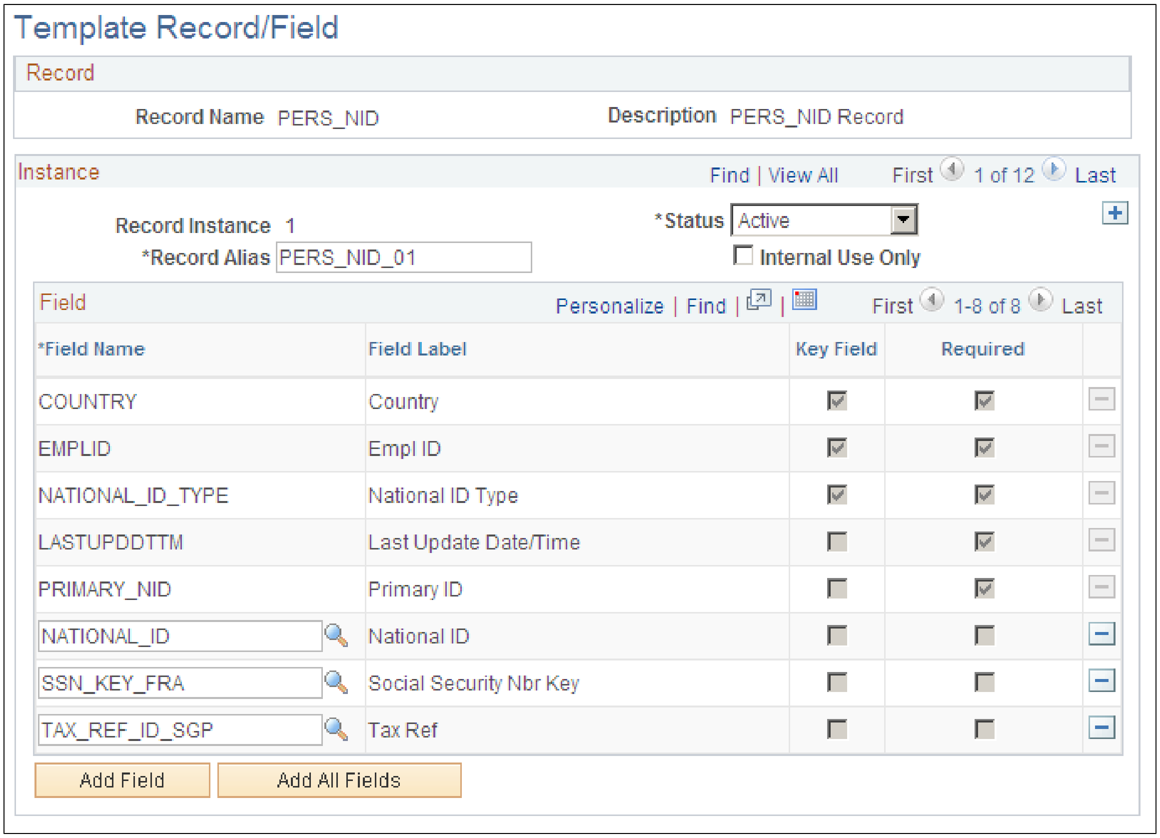
Use the Template Record/Field page (HR_TBH_RECDEFN) to set up and maintain the records and fields to be used in the Smart HR templates.

The records/fields that should be available to be included in the templates will be stored in the Template Record Setup Table (HR_TBH_RECDEFN) and Template Field Setup Table (HR_TBH_RECDTL). The Template Record Setup Table contains one row for each table currently included in the core Hire process with at least one enterable field (except for tables with multiple instances, such as phone numbers, email addresses, and so forth, where more than one row exists). It also contains views of the Profile Management tables.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Record/Field** > **Template Record/Field**

This example illustrates the fields and controls on the Template Record/Field page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Record Name	Indicate the name of the table to be included. (Prompted from the same field in the PeopleTools Record Definition table.)
Record Instance	Displays the instance number of the record. Defaults to 1. Use for records with more than one instance, such as phone numbers, email addresses, and so forth.
Record Name Alias	Enter the alternative name of the table to be included. Defaults to the **Record Name** value. This field enables the implementer to differentiate between two different instances of the same record. For example, business address (ADDRESSES_1) from mailing address (ADDRESSES_2). This is the prompt shown for the record when adding a new record/field to a section.
Internal Use Only	Select this check box to designate fields that are used in the Smart HR process but are not passed to the Services/CI.
Key Field	This check box is selected (in PeopleCode) if the field is defined as a key field at the system level (in the PeopleTools Record Field table PSRECFIELD). This field cannot be changed by the Implementer (display-only).

Field or Control	***Description***
Required	This check box is selected by default (in PeopleCode) and is based on the PeopleTools Record Field table PSRECFIELD. This field cannot be changed by the implementer (display-only).

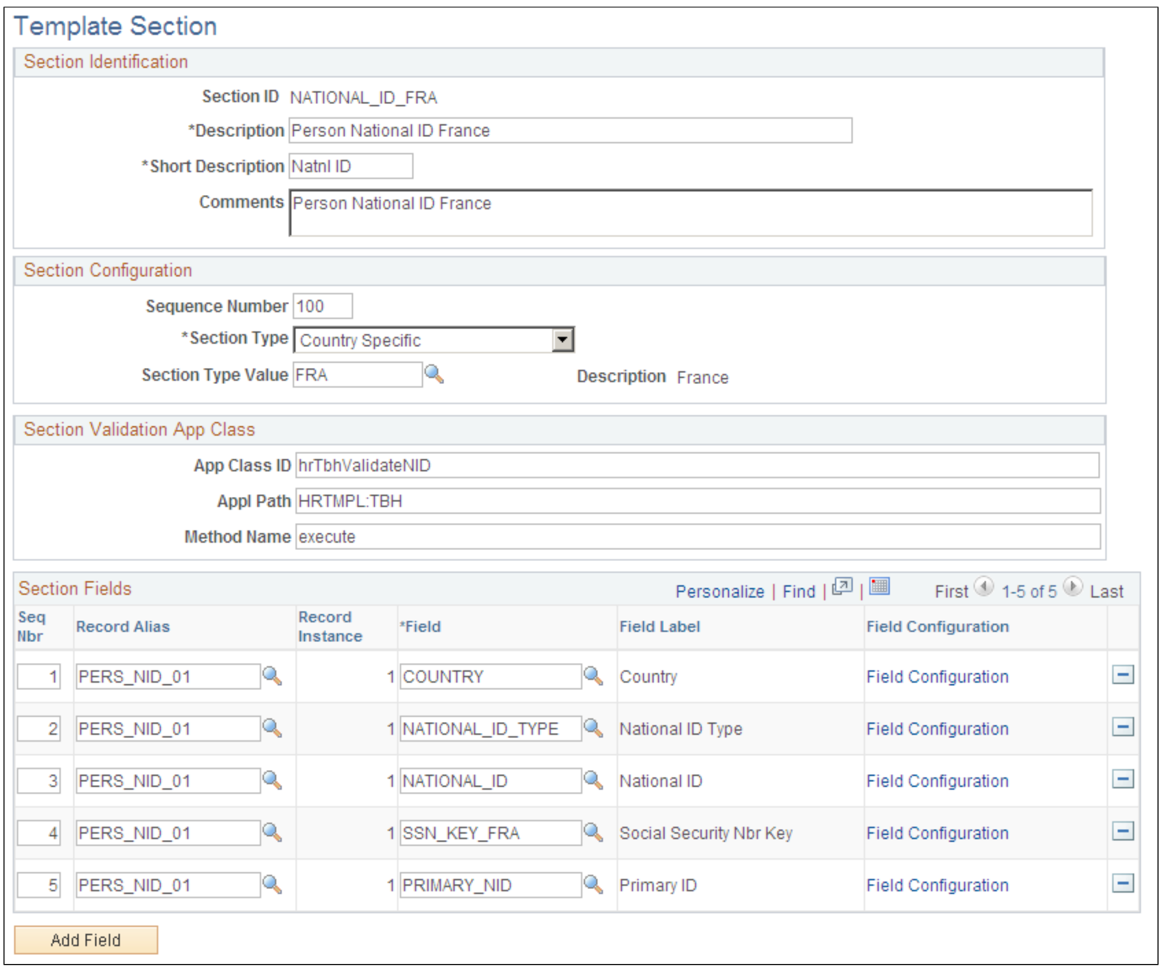
Template Section Page

Use the Template Section page (HR_TBH_SECDEFN) to identify and configure sections, and list and configure the fields contained in a section.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Section** > **Template Section**

This example illustrates the fields and controls on the Template Section page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Sequence Number	Enter the number to determine the order of sections on the end user data entry page.
Section Type	Specify a type that defines the section. Valid values are *General, Country, Name, Address,* and *Federal.* **Note:** (USF) U.S. Federal customers will only see National Finance Center (NFC) interface fields if the database is federalized and Payroll Interface is selected on the HR Installation table. See "Setting Up Implementation Defaults" (Application Fundamentals)
Section Type Value	Enter the value for the section type you specified. For *Name* sections, this field stores the name format code. For the *Country* and *Address* sections, this field stores the appropriate country code. The field is empty for *Federal* and *General* sections. For *JPM* sections, the category type is stored here.
Add Field	Click this button to add additional fields in the **Section Fields** grid area.

Section Validation App Class

A user-exit is provided for each section for validation that might be required by your organization. These are implemented as application class methods routines and appear in the **App Class ID, App Class Path,** and **Method Name** fields. There are three section validation methods delivered as system data: National IDs, Addresses, and Names.

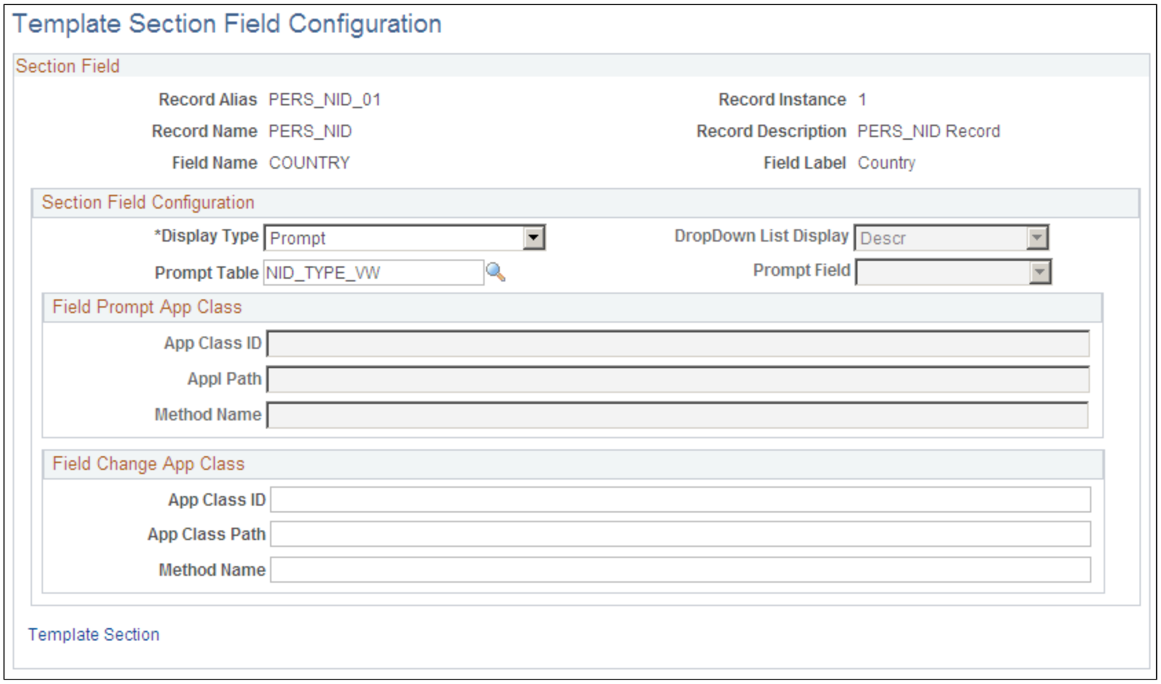
Template Section Field Configuration Page

Use the Template Section Field Configuration page (HR_TBH_SECDTL) to add additional user exit information for field changes and field prompts.

Navigation:

Click the **Field Configuration** link on the Template Section page.

This example illustrates the fields and controls on the Template Section Field Configuration page. You can find definitions for the fields and controls later on this page.



Section Field Configuration

Field or Control	***Description***
Display Type, DropDown List Display, Prompt Table, and **Prompt Field**	Select how a field type should appear on the template to an end user and from which table it should retrieve valid values. The **Display Type** value options depend upon the field selected. For example, a field may or may not require a prompt table, it may use a date field, require a yes and no response, or needs to display a push button. The prompt table fields are disabled for all but the fields with a prompt table.

Field Change App Class

The Field Change App Class provides a user exit for field change code to be added. Some delivered section fields include field change code. For example, the **Company** field on the Work Location - Job Fields section has field change code that builds prompt lists for other fields in the section, such as **Location** and **Establishment ID.**

Note: Oracle recommends that any validation methods added to the PeopleSoft application at implementation be stored in a customer-created application class.

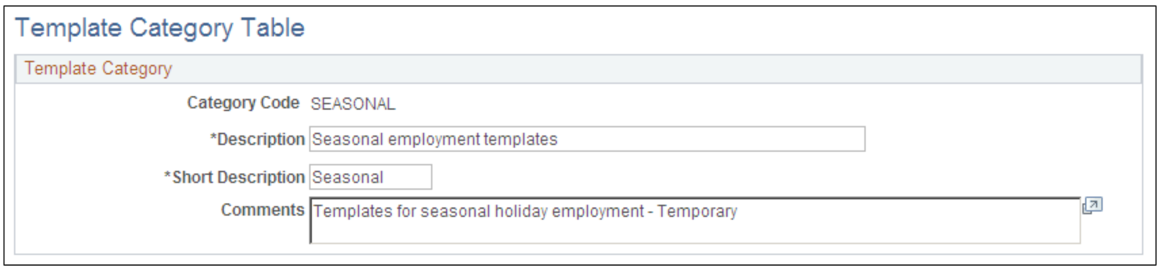
Template Category Table Page

Use the Template Category Table page (HR_TBH_CTG_TBL) to set up template categories for grouping templates and for row-level security.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Category Table** > **Template Category Table**

This example illustrates the fields and controls on the Template Category Table page. You can find definitions for the fields and controls later on this page.



When you create your templates, you will need to assign each template to a category. Template categories:

- Groups templates.

  Categories are helpful when a template administrator is trying to narrow their search results when looking for a particular template. On the Template Creation page, you can perform an advance search for existing templates by category, as well as by other defined fields.

- Provide row-level security for a template.

  End users will only see templates for which they have security access.

  Note: To set up row-level security for end users, you will need to enable the security set (TBHTMPL) and security access types for Smart HR Templates and set up security for the end user's permission list.

Related Links

"Understanding PeopleSoft Security" (Application Fundamentals)

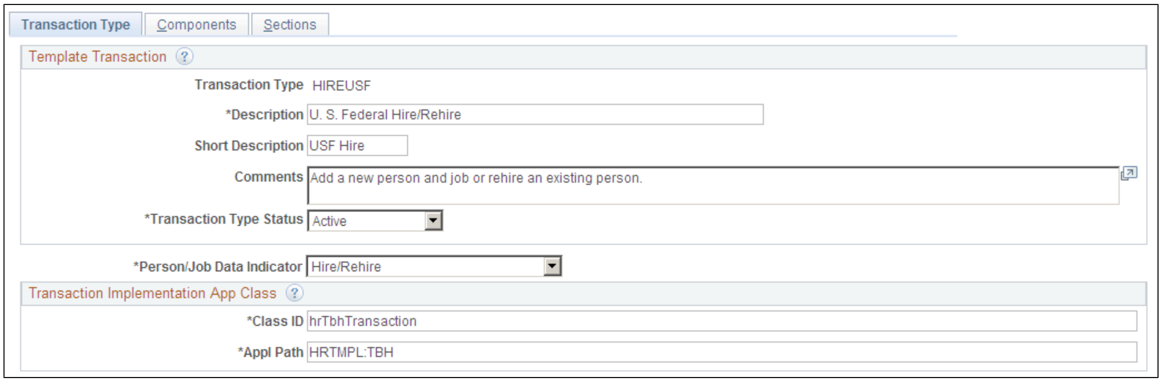
Smart HR Transaction Type - Transaction Type Page

Use the Smart HR Transaction Type - Transaction Type page (HR_TBH_TXN_TBL) to define transaction types for your Smart HR templates.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Transaction Type** > **Transaction Type**

This example illustrates the fields and controls on the Smart HR Transaction Type - Transaction Type page. You can find definitions for the fields and controls later on this page.



Note: You can use transaction types when determining which users have security access to a template.

Field or Control	***Description***
Transaction Type Status	Defaults to *Test.* Valid values are *Active, Inactive,* and *Test.* You must change the status to *Active* in order for the transaction type to be available for selection on a Smart HR template. You can set it to *Inactive* once a transaction type is no longer needed. **Note:** Existing active templates that use a transaction type that has since been changed to inactive will still be valid. However, you cannot create new templates using a transaction type with an *Inactive* status.
Person/Job Data Indicator	Indicate if the transaction type will include changes to personal data, job data, both, or neither. Valid values are *Hire/Rehire, Neither, Update Job, Update Person,* and *Update Person and Job.*
U.S. Federal Transaction Type	(USF) Select this check box to indicate that this is for a U.S. Federal transaction. When you select a transaction type in the Smart HR Template Creation component that has been specified as U.S. Federal, the U.S. Federal Template check box on the Configuration page of the template will be selected automatically as display only. This check box is only available when the **Federal** check box has been enabled on the Installation table.
Class ID and **Path**	Enter the application class ID and path to specify the location of the implementation code for the transaction type.

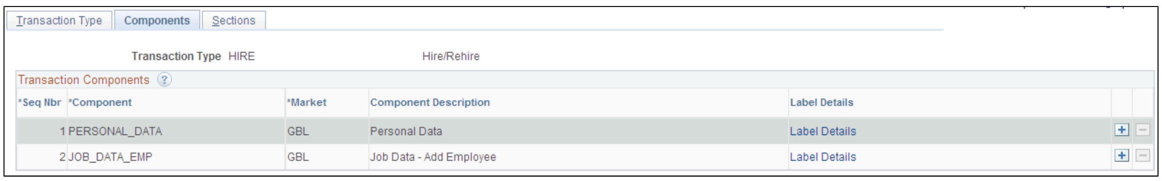
Smart HR Transaction Type - Components Page

Use the Smart HR Transaction Type - Components page (HR_TBH_TXN_CMP) to identify which components will be updated when the end user or HR administrator saves the data to HR during the Smart HR Transactions process.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Transaction Type** > **Components**

This example illustrates the fields and controls on the Smart HR Transaction Type - Components page. You can find definitions for the fields and controls later on this page.



Identify the HR or other components that should be updated by a template. These components will be updated upon saving the data to HR during the Smart HR Transactions process.

Field or Control	***Description***
Seq Nbr (sequence number)	Indicates the order in which the system will access the components. The first sequence number must start with 1 and all numbers must be consecutive, without gaps.

Field or Control	Description
Component	Define at least one component for a transaction type. You can include up to 10 components. The system automatically provides Personal Data or Job Data components by default based on the value you entered in the **Person/Job Data Indicator** field and the **U.S. Federal Transaction Type** check box field selection on the Transaction Type page. These components cannot be changed or deleted unless you change either of the previously mentioned field values, and then they will be replaced with the new default components that correspond to that indicator. Any existing non-defaulted components will be re-sequenced so that they follow the newly defaulted components. When the **Person/Job Data Indicator** value is *Neither,* the system does not provide any components by default. **Note:** The system will issue an error message if you add a Personal Data or Job Data-related component manually. This list identifies the Personal Data or Job Data-related components that you cannot include manually: • PERSONAL_DATA • PERSONAL_DATA_ADD • JOB_DATA • JOB_DATA_EMP • JOB_DATA_CONCUR • JOB_DATA_CURRENT • JOB_DATA_CWR • JOB_DATA_POI • JOB_DATA_CWR_SRCH • JOB_DATA_EMP_SRCH • EE_HIRE • EE_HR_PROC • EE_1ST_AUTH • EE_2ND_AUTH • EE_ADD_ORG_ASGN • EE_APPROVAL • EE_CANCELLATION • EE_CONC_HIRE

Field or Control	Description
	• EE_CORRECTION
Market	Identify the market for the component you selected.
Label Details	Select this link to access the Transaction Component Details page and add label details for the selected component.

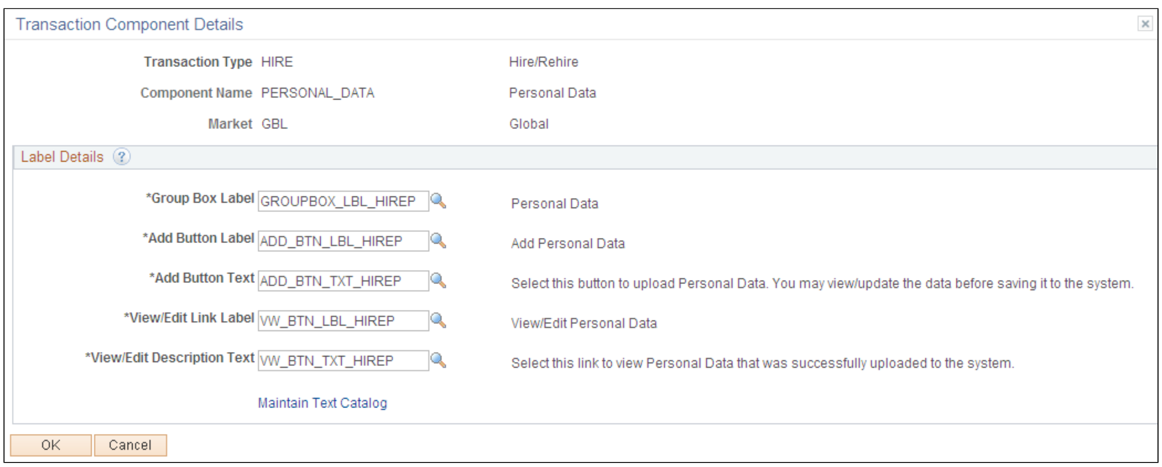
Transaction Component Details Page

Use the Transaction Component Details page (HR_TBH_TXN_SEC) to specify label details related to a component.

Navigation:

Click the **Label Details** link from the Smart HR Transaction Type - Components page.

This example illustrates the fields and controls on the Transaction Component Details page. You can find definitions for the fields and controls later on this page.



When the HR administrator is required to review or complete a Smart HR transaction, he or she will access the transaction using the Manage Hire or Manage Transaction Details pages. Each component associated with a transaction will appear on these pages as a group box, with corresponding links and buttons to either view, edit, or add information to the component.

Use the Transaction Component Details page to configure the group-box, add button, and view/edit labels and text for the component you selected. For each field, select labels and text IDs from the Text Catalogue specific to your business processes. Valid values for Smart HR templates are text IDs that have *Human Resources (HHR)* as the object owner and a sub ID of *TBH*.

Field or Control	Description
Group Box Label	Identify a header for the group box that identifies the component you will update or view.

Field or Control	***Description***
Add Button Label and **Add Button Text**	Enter text information related to the **Add** button that appears on the page for the HR administrator to add information to the person's Smart HR transaction. The system displays the **Add** button when no data for the respective component has been saved to the system. Select a text ID that introduces the button in the **Add Button Text** field, such as text that says to select the button to add Personal Data. Select text that will appear on the button in the **Add Button Label** field, such as *Add Personal Data.*
View/Edit Link Label and **View/Edit Description Text**	Enter text information related to viewing and editing data that was added during the Smart HR transaction. The system displays the view and edit field labels when data was successfully uploaded to the system during the Smart HR transaction. Although the data was saved successfully during the Smart HR transaction process, the HR administrator can select the link to review and update the user's entry. Select a text ID that introduces the link in the **View/Edit Description Text** field, such as text that says to select the link to view Personal Data. Select text that will appear as a link in the **View/Edit Link Label** field, such as View or Edit Personal Update.
Maintain Text Catalog	Select this link to access the Maintain Text Catalog page to add or update a text message.

Related Links

"Configuring the Text Catalog" (Application Fundamentals)

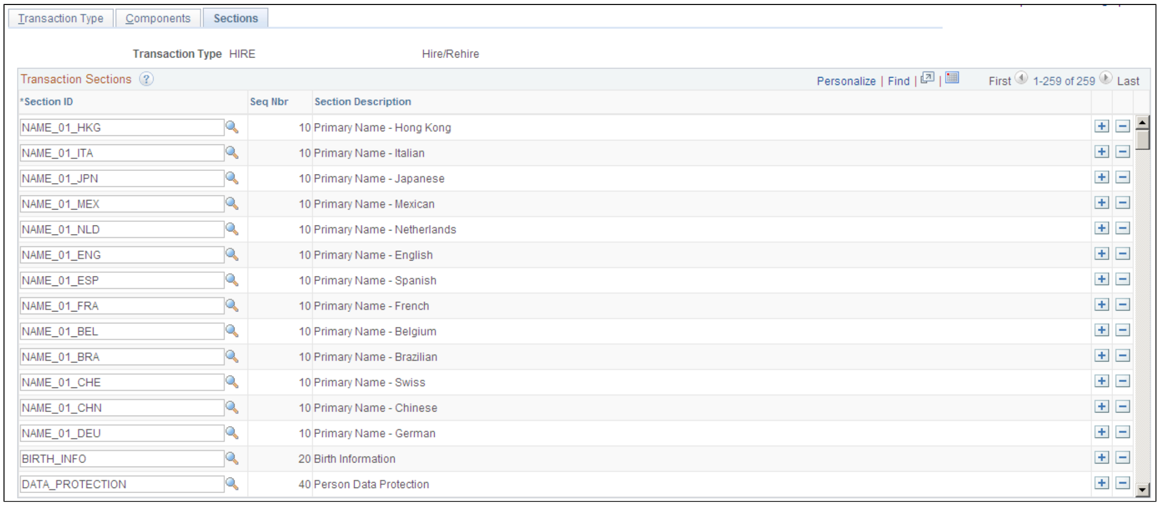
Smart HR Transaction Type - Sections Page

Use the Smart HR Transaction Type - Sections page (HR_TBH_TXN_SCT) to define which sections should be available to a template when it uses this transaction type.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Transaction Type** > **Sections**

This example illustrates the fields and controls on the Smart HR Transaction Type - Sections page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Section ID	Identify sections that are part of this transaction type. At least one section must be defined for a transaction type. Valid values are defined on the Template Section Page. **Note:** Personal data sections are required for all transaction types, even if there are no updates to Personal Data, so that a person can be found in the system using the Search Match process. These should be the sections which include data typically used in Search Match (defined in the Search/Match Rules and Search/Match Parameters components) such as name, address, national ID, birth date and gender. Templates associated with this transaction type can contain only those sections you define here. For example, if for addresses you associate only the *Person Address - Canada* section to this transaction type, you will not be able to associate other person address sections, such as *Person Address - United States,* to the templates that use this transaction type. Use the **Load/Reload Sections** button on the Smart HR Template Creation - Sections Page to have the system populate the template with all the sections defined for the transaction type. You can delete those sections that are not applicable to a template but you cannot add sections that are not defined for the transaction type.
Seq Nbr (sequence number) and **Section Description**	Displays the sequence number and description defined on the Template Section Page.

Copy Transaction Type Page

Use the Copy Transaction Type page (HR_TBH_COPY_TXN) to copy a template transaction type.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Copy Smart HR Transaction Type** > **Copy Transaction Type**

This example illustrates the fields and controls on the Copy Transaction Type page. You can find definitions for the fields and controls later on this page.

When you access the Copy Transaction Type, select an existing transaction type you want to copy. Enter the new transaction type information and click **Save.** The system will open the Smart HR Transaction Type - Transaction Type Page where you can update the appropriate information for the new transaction type.

Smart HR Template Creation - Template Creation Page

Use the Smart HR Template Creation - Template Creation page (HR_TBH_TMPL_HDR) to create and modify templates.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Creation** > **Template Creation**

This example illustrates the fields and controls on the Smart HR Template Creation - Template Creation page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Template	Enter a template name that defines this template.

Field or Control	***Description***
Status	Select a status. The default option for this field is *Test* when creating a new template. You can change the value to *Active* when it's time to be published, or *Inactive* when the template is no longer necessary. Only active templates are available to the end user.
Effective Date	Determine the effective date of a template. The default value for this field is today's date.

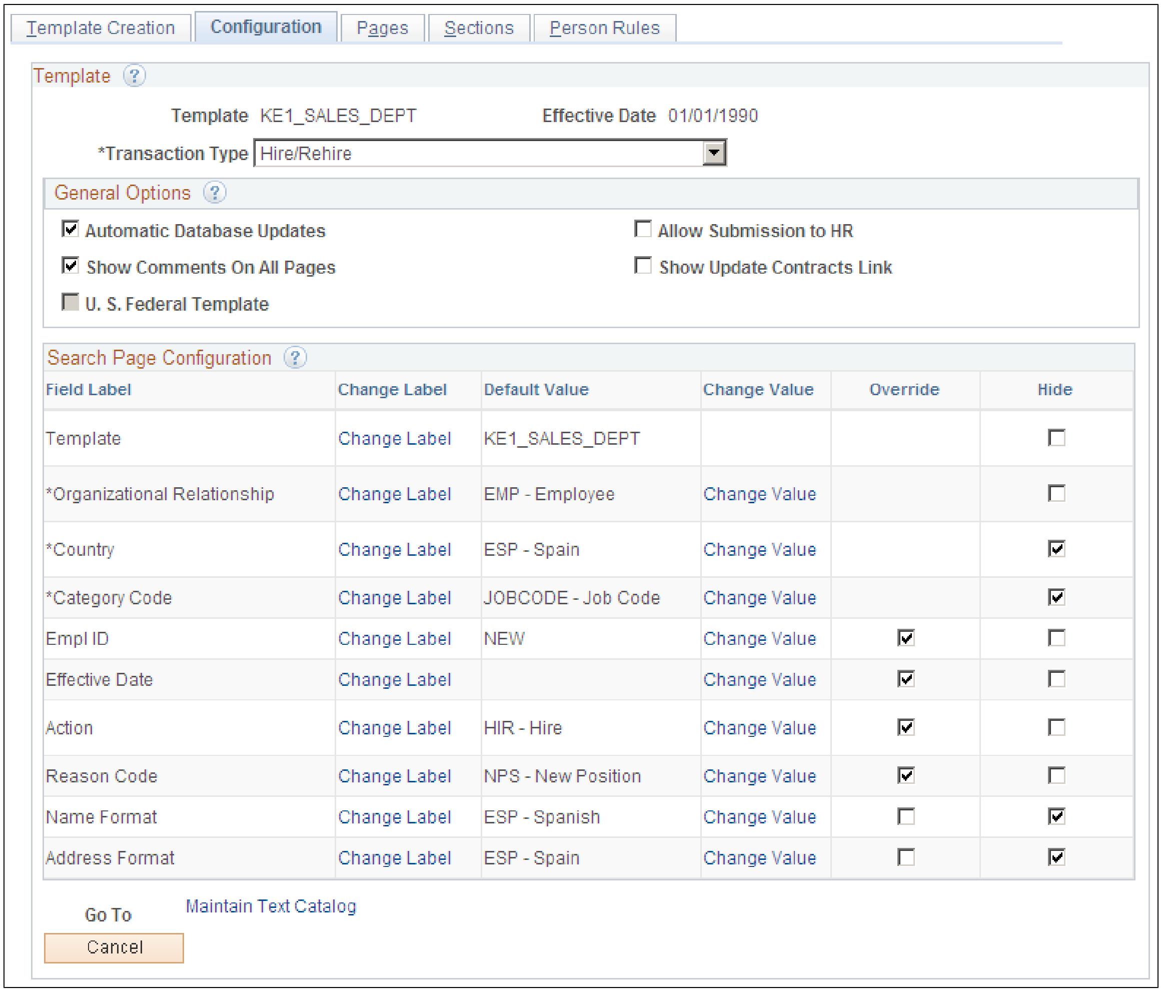
Smart HR Template Creation - Configuration Page

Use the Smart HR Template Creation - Configuration page (HR_TBH_TMPL_CFG) to set up general options and the search page configuration for a template.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Creation** > **Configuration**

This example illustrates the fields and controls on the Smart HR Template Creation - Configuration page. You can find definitions for the fields and controls later on this page.



The system uses **Transaction Type, Template ID, Org Relationship, Country,** and **Category Code** fields as part of row-level security. Use these fields to determine to which templates end users will have access.

Field or Control	***Description***
Transaction Type	Select a transaction type that will identify how the template will be used and determines which components will be updated. For example, a transaction type of *Change Job Data* may update the Job Data component only, while a *Hire/ Rehire* type will update both Job Data and Personal Data. The transaction type also defines which sections will be available on the Sections page when creating a template. This information is defined on the Smart HR Transaction Type - Sections Page. When creating or working with a Smart HR transaction, the user can use the **Transaction Type** field as a filter to search for a specific template or transaction. When you change a transaction type, the system will clear the **Action** and **Reason Code** fields, if previously populated, and display a warning message to indicate that the sections for the template will need to be updated to ensure that the sections are valid for the transaction type.
Automatic Database Updates	Select this check box to have the data entered by the end user automatically update the database. **Note:** When ACA eligibility is associated with a hire template, the hire is saved successfully, and the regulatory region associated with the new employee is associated with the country code USA, then the transaction will update the system and HR will raise the *ACAEligibility* event. If the submission of the transaction is unsuccessful, the transaction will be sent to the HR administrator for final processing. Deselect this check box to have the data entered by the end user sent to an HR administrator for final processing.
Allow Submission to HR	Select this check box if the end user does not have all the required data, such as a National ID, and needs to submit the transaction request to HR to complete. This check box is only available when the **Automatic Database Updates** check box is selected. If **Automatic Database Updates** is selected, the following applies: • The **Submit to HR** button appears on the Smart HR Transactions or Smart HR for Managers pages. This enables the end user to submit incomplete data to HR without entering all the required fields (although first name and last name are required). When the end user clicks this button, the transaction request is sent to HR in *HR Action Required* status for HR to complete final processing. • The **Save and Submit** button appears on the Smart HR Transactions or Smart HR for Managers pages. When the end user clicks this button, data is automatically updated to the database (if no errors are encountered).

Field or Control	*Description*
Show Comments On All Pages	Select to have a **Comments** edit box appear at the bottom of each page of the Smart HR Transactions or Smart HR for Managers component when an end user performs a Smart HR transaction. Deselect to have the **Comments** edit box appear at the bottom of only the last page of the Smart HR Transactions or Smart HR for Managers component when an end user performs a Smart HR transaction. If there is only a single page, the **Comments** box will appear on that page.
Show Update Contracts Link	Select to have the **Update Contracts** link to the Contracts component appear on the Confirmation page after performing a Smart HR transaction. This enables users to update contract information for a person. This link appears on the Confirmation page when **Automatic Database Updates** is selected on the template and the transaction is saved successfully. **Note:** Users of the template must have access to the Contract Data component.
U.S. Federal Template	(USF) Displays this check box as selected when the transaction type is defined as a U.S. Federal transaction type. This enables you to see the standard U.S Federal (USF) sections. This check box is only available when the **Federal** check box has been enabled on the Installation table. **Note:** Do not use a U.S. Federal-defined transaction type when you are creating templates for U.S. Federal contingent workers.

Search Page Configuration (Fields)

Displays the fields available to the end user on the Enter Transaction Details page of the Smart HR Transactions or Smart HR for Managers component.

Note: See the following section on how to select the field labels, determine whether the end user should be able to override a default value, or if the field should be hidden from the user.

Field or Control	*Description*
Template	Displays the template ID you entered for this template.

Field or Control	***Description***
Organizational Relationship	Select an organizational relationship of the worker. The default option for this field is *Employee.* The other available option is *Contingent Worker.* **Note:** *Person of Interest* is not an option.
Country	Enter a default country code for the template. • The country you select impacts country defaults and what sections appear on the template. • (USF) This field defaults to *USA* for U.S. Federal installations.
Category Code	Select a category code for template grouping and as part of the row-level security for this template. A category may represent a specific department, location, business unit, region, and so forth.
Empl ID (employee ID)	Accept the default value of *NEW* to have the system automatically assign the next ID or leave the field blank to have the end user manually enter the ID.

Field or Control	*Description*
Effective Date	Click the **Change Value** link to access the Section Field Default Value page and specify a fixed or default effective date of a Smart HR transaction, if applicable. Note the following: • Some business processes require a fixed job effective date, such as in the case of seasonal hiring. In this case, enter the effective date and do not select the **Override** check box. This will prevent the user from updating the provided fixed date. • For a default effective date that the user can override, enter the date and select the **Override** check box. The system will provide this default date as the Job Effective Date, but the user can change the job effective date as needed. • To have the system use the current date and the Job Effective Date value, leave the **Effective Date** field blank. **Note:** Usually you will select the **Override** check box for this field and set the default value to blank. When left blank, the **Job Effective Date** field for the hire will default to the current system date. If the **Override** check box is selected, the end user can update this information to provide the actual transaction date.
Action	Enter the action of adding this employment instance. When using a hire or rehire transaction type, values for an employee are *Hire* and *Rehire,* while values for adding a contingent worker are *Add* and *Renewal.* For non-hiring transaction that update job data, all valid actions will be available except the ones listed for hires and rehires. When using a personal or profile data transaction type that does not involve a change to job data, this row will be unavailable for entry.
Reason Code	Determine if you want to provide a default reason code, which is associated with the action. When using a personal or profile data transaction type that does not involve a change to job data, this row will be unavailable for entry.

Field or Control	*Description*
Format Using	Specify a name format that may be used during the Smart HR transaction. The name format that you select impacts the actual transaction page. You can hide this field from the end user if you do not want the end user to select a different name format. If you enable the end user to choose another name format, you must include at least two different name sections on the Sections page.
Address Country	Specify an country address format that may be used during the Smart HR transaction process. The country address format that you select impacts the actual transaction page. You may hide this field from the end user if you do not want the end user to select a different address format. If you enable the end user to choose another address format, you must include at least two different address sections on the Sections page.
Maintain Text Catalog link	Click the **Maintain Text Catalog** link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change or create labels.

Search Page Configuration (Columns)

Determine how you want to display each field to the end user on the Enter Transaction Details page of the Smart HR Transactions or Smart HR for Managers component. Select the field label and select whether the end user should be able to override a default value, or if the field should be hidden from the user.

Field or Control	*Description*
Field Label and **Change Label**	Click this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label.
Default Value and **Change Value**	Click the **Change Value** link to open the Section Field Default Value page and define a default value for the field. The value you select displays in the **Default Value** field.
Override	Select this check box to enable the end user to change the default value when performing a Smart HR transaction. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the **Hide** check box so the end user has access to the field to edit the value.

Field or Control	***Description***
Hide	Select this check box to hide this field and the default value from the end user when performing a Smart HR transaction. When you select this check box, the system deselects the **Override** check box. The end use will not be able to change the default value since the field is hidden.

Related Links

"Configuring the Text Catalog" (Application Fundamentals)

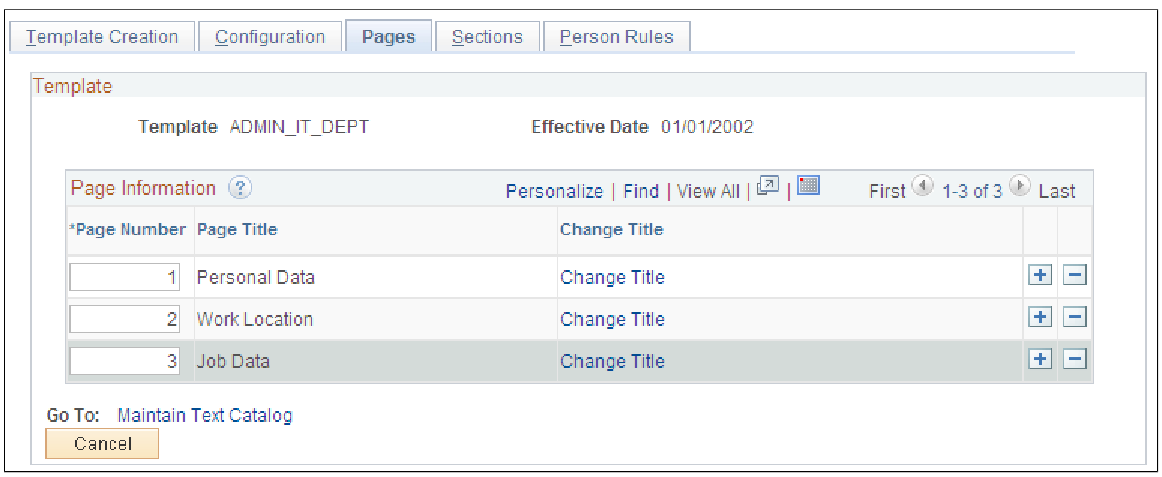
Smart HR Template Creation - Pages Page

Use the Pages page (HR_TBH_TMPL_PAG) to set up the page number order and tab names that should appear on the Smart HR Transactions or Smart HR for Managers pages.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Creation** > **Pages**

This example illustrates the fields and controls on the Pages page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Page Number	Enter a number that will define the page tab order on the Enter Transaction Information page. On the Sections page, you will assign sections to one of these page numbers. This will group sections together or separate them onto different tabbed pages. The system will display these tab names when the end user or HR administrator is entering a transaction using the Smart HR Transactions - Enter Transaction Information page. For example, you may want to group all compensation and payroll information-related sections and fields within a page called Salary Data. You can have all the sections appear on one page, by entering only one page number and label, or you can group the sections on different pages, by creating numerous page numbers and labels.
Change Title	Click this link to access the Define Tab Detail page and define how the tab label should appear on the Enter Transaction Information page during the Smart HR transaction process.
Maintain Text Catalog	Click the **Maintain Text Catalog** link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change or create labels.

Related Links

"Configuring the Text Catalog" (Application Fundamentals)

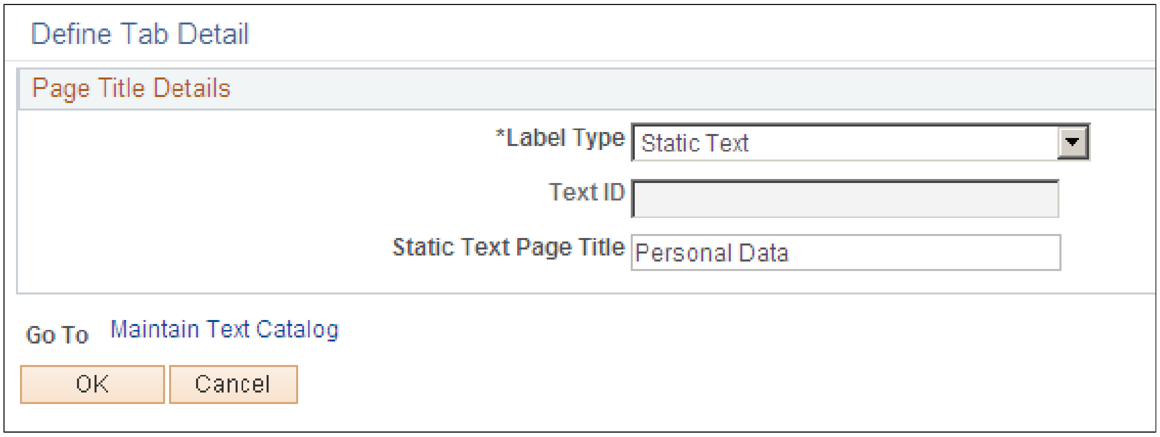
Define Tab Detail Page

Use the Define Tab Detail page (HR_TBHTAB_DTL_SEC) to identify the tab names in the Smart HR Transactions or Smart HR for Managers component.

Navigation:

Click the **Change Title** link on the Pages page.

This example illustrates the fields and controls on the Define Tab Detail page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Label Type	Select the type of label that you will use. Values are *Static Text* and *Text Catalog*.
Text ID	Select the text ID from the Text Catalog if you have selected *Text Catalog* in the **Label Type** field.
Static Text Page Title	Enter the tab label name if you have selected *Static Text* in the **Label Type** field.
Maintain Text Catalog	Click the **Maintain Text Catalog** link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to add or change labels.

Related Links

“Configuring the Text Catalog” (Application Fundamentals)

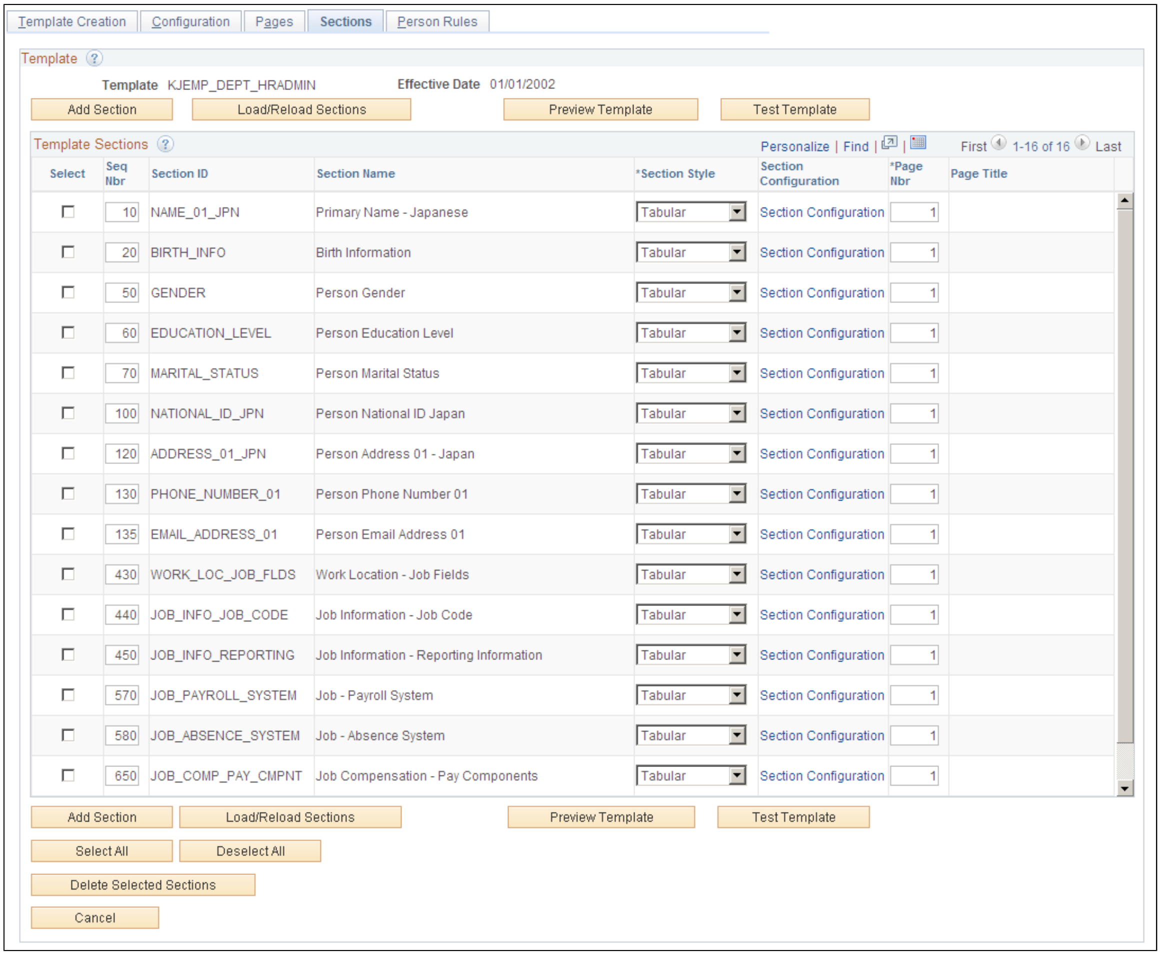
Smart HR Template Creation - Sections Page

Use the Smart HR Template Creation - Sections page (HR_TBH_TMPL_SEC) to add and configure template sections.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Creation** > **Sections**

This example illustrates the fields and controls on the Smart HR Template Creation - Sections page. You can find definitions for the fields and controls later on this page.



The template administrator uses the Sections page to define which sections will appear in the template for the end user.

The template administrator has access to all commercial fields and U.S. Federal fields which can be entered as part of the Smart HR transaction process in the Personal Data, Job Data, and profile components. The administrator organizes the fields into sections, ranging from one field in a section to ten or more fields in a section, and determines which sections are hidden from the end user during the Smart HR transaction process for each template.

Note: If a position number is selected on the template definition it will not populate values from Position Management. The administrator must hide fields that are populated by position number because they are overridden at the time the position number is loaded in Job Data and defaults are automatically entered. See the PeopleSoft Human Resources Manage Positions documentation for a list of fields that are provided by default into Job Data (from Position Data—this does not include what may also be defaulted in the job code).

Field or Control	***Description***
Add Section	Click this button to add a new row for another section.

Field or Control	Description
Load/Reload Sections	Click this button to add all viable sections to the template. The system looks at the values that were entered for the transaction type, country, name format, address format, and at the U.S. Federal flag to determine which sections to load. The following actions occur when the load process adds or removes sections: • If a section is already present, it is not overwritten. • If you change the transaction type on a template, existing sections that are no longer valid are deleted and new sections corresponding to the new transaction type are loaded. • If you change the country on a template, existing country-specfic sections are deleted and new country sections are loaded. • If you change the name format or address format on a template, existing name and address format-specific sections are deleted and new sections are loaded.
Select All and **Deselect All**	Click the **Select All** button to easily select all the sections on this page for easy deletion or deselect all section rows to avoid deletion.
Delete Selected Sections	Click this button to have the system delete all selected section rows from this template.
Preview Template	Click this button to open a new browser window to preview the template. Preview mode displays each template page and the sections on those pages.
Test Template	Click this button to validate if the template is set up correctly. **Note:** The template administrator is able to test the template only if **Automatic Database Updates** is selected on the Configuration page. Test mode is not available if **Automatic Database Updates** is deselected since the CI/Service is not called. The Template Administrator clicks this button and the Smart HR Transactions - Enter Transaction Details pages displays in a new browser. The administrator then enters a person's data as an end-user would and then clicks the **Test Template** button on the last Smart HR Transactions or Smart HR for Managers page. If the template is set up correctly, the Test Confirmation page appears stating that your template configuration is successful. If the template is not set up correctly, the Test Confirmation page appears with a link to view the errors that the template encountered. **Note:** Testing a template does not update any of the components associated with the template transaction's type.

Template Sections

Field or Control	***Description***
Seq Nbr (sequence number)	Enter a sequential number to reorder sections. The lower numbered section will appear first on a page for the end user. Sequence numbers come from the Template Section Page, but can be overridden here.
Section Style	Indicate whether the section should be displayed in *Tabular* format or *Grid* format. The Grid format is for multi-row sections such as Profile Management items, addresses, phone numbers, emails, and so forth.
Section Configuration	Select this link to open the Template Section Configuration page and use the Text Catalog to update fields values within a section.
Page Nbr (page number) and **Page Title**	Assign sections to a page number you defined on the Pages page. The page title will automatically display from either the Text Catalog value or static text you entered Define Tab Detail page.

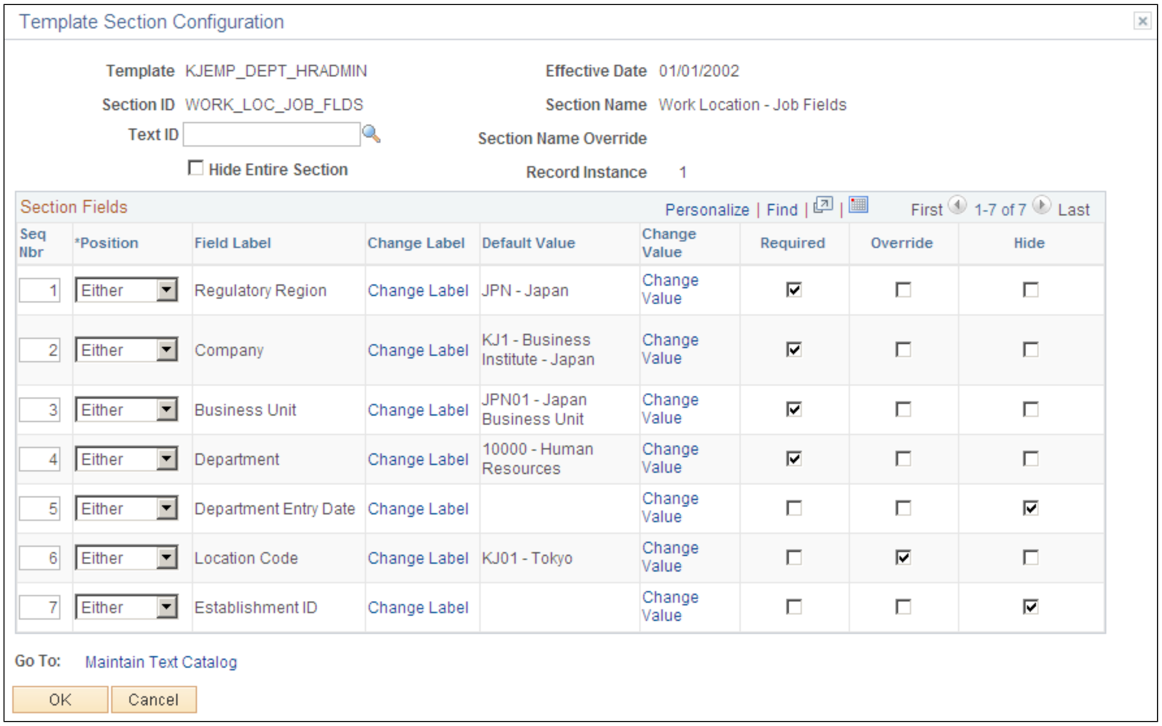
Template Section Configuration Page

Use the Template Section Configuration page (HR_TBH_TMPL_FLDS) to configure the fields for a section within the template.

Navigation:

Click the **Section Configuration** link on the Sections page.

This example illustrates the fields and controls on the Template Section Configuration page. You can find definitions for the fields and controls later on this page.



The template administrator uses the Template Section Configuration page to determine which fields will appear in a section and determine if the field should be required, have a default value provided, and if the end user can change any values.

Field or Control	***Description***
Text ID and**Section Name Override**	Enter a different text ID to if you want to change the group box header on the Smart HR Transactions or Smart HR for Managers page. The new name displays in the **Section Name Override** field.
Hide Entire Section	Select this check box to hide this section from the end user when entering the Smart HR transaction.

Section Fields

Field or Control	***Description***
Seq Nbr (sequence number)	Enter a sequential number to reorder the fields in this section. The sequence number is defined on the Template Section Page but can be overridden here.

Field or Control	***Description***
Position	Enter the location that the field should appear within the section. Values are *Either, Left,* and *Right.* By selecting *Either,* the system will place the field in the next logical order location, either left or right.
Field Label and **Change Label**	Click the **Change Label** this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label.
Default Value and **Change Value**	Click the **Change Value** link to open the Section Field Default Value page and define a default value for the field. The system displays this value in the **Default Value** field.
Required	Select this check box if the end user is required to enter a value in the field.
Override	Select this check box to enable the end user to change the default value when performing a Smart HR transaction. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the **Hide** check box so the end user has access to the field to edit the value.
Hide	Select this check box to hide this field and default value from the end user when performing a Smart HR transaction. When you select this check box, the system deselects the **Override** check box. The end use will not be able to change the default value since the field is hidden.
Maintain Text Catalog	Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label sections.

Related Links

Understanding Smart HR Templates

"Configuring the Text Catalog" (Application Fundamentals)

Smart HR Template Creation - Person Rules Page

Use the Smart HR Template Creation - Person Rules page (HR_TBH_TMPL_PER) to enable or disable Search Match functionality for a template and define options for handling existing person data and employment instances in the database.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Smart HR Template Creation** > **Person Rules**

This example illustrates the fields and controls on the Smart HR Template Creation - Person Rules page. You can find definitions for the fields and controls later on this page.

Search for Existing Person

Use these fields to enable or disable Search Match.

Field or Control	***Description***
Use Search Match To Find Existing Persons	Select whether the Smart HR process should use the Search Match functionality. If you select: • *Yes* - Search Match will run before the transaction can be saved or submitted, regardless if **Automatic Database Updates** is selected for this template on the Configuration page. Selecting the **Save and Submit** button during the transaction will trigger the Search Match process behind the scenes. • *No* - the system will hide all other fields on this page and the Search/Match process will not run. After the end user clicks **Save and Submit,** the system will display the confirmation page.

For templates with a transaction type where the **Person/Job Data Indicator** field value is *not* equal to *Hire/Rehire,* the **Use Search Match To Find Existing Persons** field is automatically set to *Yes* and is grayed out so it cannot be changed. These transaction type templates require a person to already be in the system. Only the **Search for Existing Person** group box fields display on the page.

Note: When the **Person/Job Data Indicator** field for a template's transaction type is set to *Update Job* or *Update Person and Job* and the template is configured for automatic database updates, the target person must have only one active job in the system. If not, the transaction will be routed to the HR Administrator to update the person model.

See Smart HR Transaction Type - Transaction Type Page.

Field or Control	***Description***
Search Parameter	Enter a search parameter, which contains a set of one or more search rules. The search parameters are what the users select prior to performing a search to determine the search fields that they are permitted to search on. This field appears when you select *Yes* in the **Use Search Match To Find Existing Persons** field.
Search Result Code	Enter a search result code, which specifies the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. This field appears when you select *Yes* in the **Use Search Match To Find Existing Persons** field.

See "Understanding Search/Match" (Application Fundamentals)

Person Exists in the System

Field or Control	***Description***
End-User Can Decide What Action to Take	Determine whether the end user decides what action to take when Search/Match is activated. When you select *Yes,* the page displays the **End-User Can Access the Person Organization Summary** field and the **Actions the End-User Can Take If No Active Organizational Instance Is Found** group box. When you select *No,* the page displays the **Action to Take if Only One Inactive Employment Instance Is Found** and **Action to Take if More than One Inactive Employment Instance (or None) is Found** group boxes.

Field or Control	***Description***
End-User Can Access the Person Organization Summary	Determine whether the end user can view more information about a person by selecting either *Yes* or *No.* When you select *Yes,* a **Per Org Summary** link is made available to the user to view organization details about a person. The **End-User Can Access the Person Organization Summary** field is available when you select *Yes* in the **End-User Can Decide What Action to Take** field.

Note: Depending on the **Organizational Relationship** value defined on the Configuration page of the Template, the field text will vary. An *Employee* relationship displays the text Employment Instance, where as a *Contingent Worker* relationship displays the wording Contingent Worker Instance. This applies to every instance of this wording on the Person Rules page.

Actions the End-User Can Take If No Active Organizational Instance

When the template administrator selects *Yes* in the **End-User Can Decide What Action to Take** field, the page displays this group box.

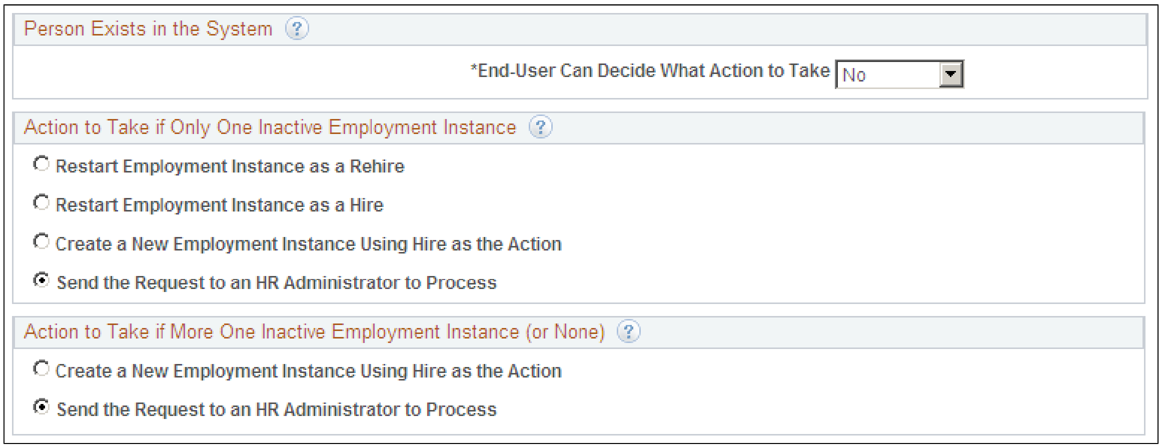
Select one or more check boxes to enable functionality for the end user for the template. This group box appears when you select *Yes* in the **End-User Can Decide What Action to Take** field. Field selection options are:

- **Select an Existing Employment Instance as a Rehire.**
- **Select an Existing Employment Instance as a Hire.**
- **Create a New Employment Instance Using Hire as the Action.**
- **Send the Request to an HR Administrator to Process.**

Action to Take if Only One Inactive Employment Instance

When the template administrator selects *No* in the **End-User Can Decide What Action to Take** field, the page presents a set of different group boxes for inactive employment instance matches.

This example illustrates the fields and controls on the Person Rules page where the end user cannot decide what action to take when a person exists in the system. You can find definitions for the fields and controls later on this page.



To define what action should occur if an inactive matching person is found during the transaction, select one of the options in this group box. Values are:

- **Restart Employment Instance as a Rehire.**
- **Restart Employment Instance as a Hire.**
- **Create a New Employment Instance Using Hire as the Action.**
- **Send the Request to an HR Administrator to Process.**

Action to Take if More than One Inactive Employment Instance (or None)

Select one option the end user can perform during a template transaction when more than one inactive employment instance is found. This group box appears when you select *No* in the **End-User Can Decide What Action to Take** field. Values are:

- **Create a New Employment Instance Using Hire as the Action.**
- **Send the Request to an HR Administrator to Process.**

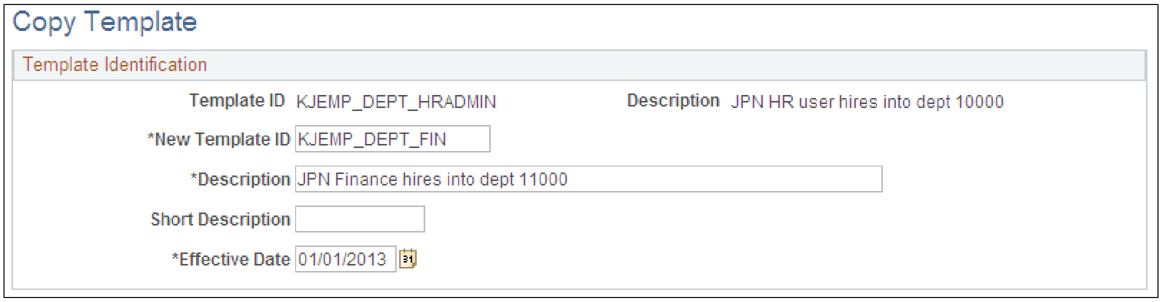
Copy Template Page

Use the Copy Template page (HR_TBH_COPY) to copy a Smart HR template and make modifications to the new template.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Smart HR Template** > **Copy Smart HR Template** > **Copy Template**

This example illustrates the fields and controls on the Copy Template page. You can find definitions for the fields and controls later on this page.



Enter the new template information and click **Save.** The system will open the Smart HR Template Creation - Template Creation Page where you can update the appropriate information.

Country Changes

If you copy a country template and save it for another country, only the related country sections appear on the page. The original country sections and their defaults do not display. For example, if a template for France (FRA) is copied and you change the country for the new template to Spain (ESP), the FRA sections are removed; the ESP sections appear, are blank, and ready for input.

Note: You will need to access the Sections page and select the **Load/Reload Sections** button to update the template with the related country sections and delete the original country sections and their defaults.

Defining Roles for Hire Notifications

To set up the hire notification roles table, use the Hire Notification (HR_HIRE_NOTIF) component.

This topic provides an overview of hire notifications and discusses how to define which roles will receive hire notifications.

Pages Used to Define Roles for Hire Related Notifications

Page Name	***Definition Name***	***Usage***
Hire Notifications Page	HR_HIRE_NOTIF	Define which roles in Human Resources will receive hire related notifications.

Understanding Hire Notifications

When a recruiter or user submits a hire request, the system uses the Hire Notification component to identify who should receive notification when someone is ready to be hired or there are errors in publishing the hire to HR.

Hire notification setup needs to be done for the administrator to receive email notifications that a person is ready to be hired or that errors occurred while processing the hire. The Hire Notifications page uses role queries to define who should receive notification of hire requests and errors. The delivered role query is ROLE_HIRE_NOTIF, however, you can define other role queries and add them on the Hire Notifications page.

The system enables hire notification emails:

1. Whenever a new hire request comes through the recruiting process.
2. Whenever there is an error in the push of profile data to HR once the applicant or person is hired.

The administrator can access the Manage Hires page to view pending hires and the status of each hire request to be processed.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

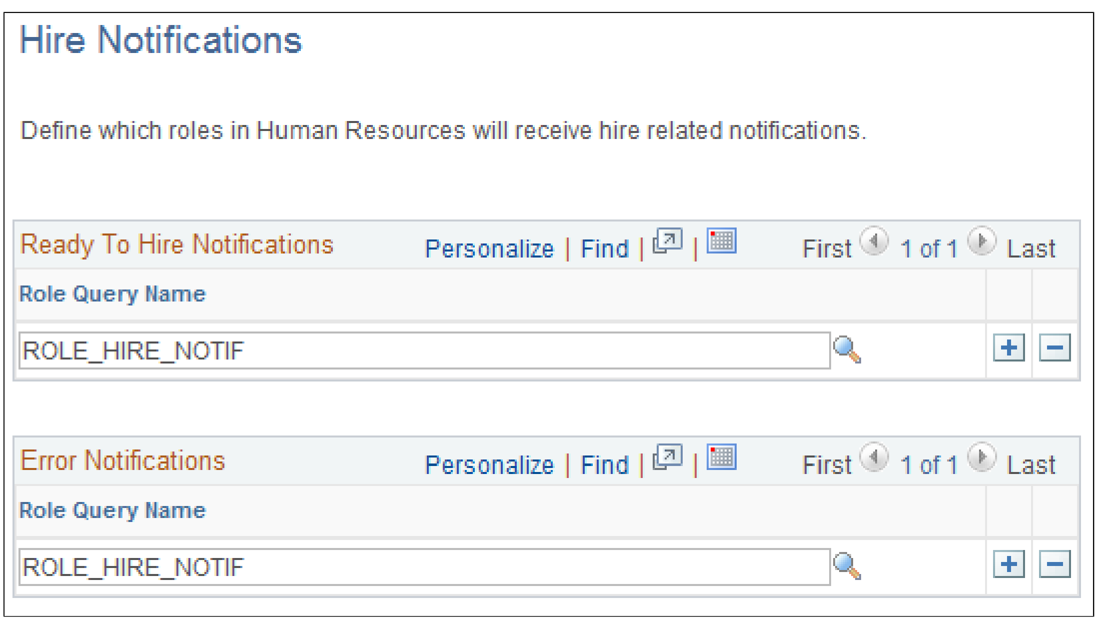
Hire Notifications Page

Use the Hire Notifications page (HR_HIRE_NOTIF) to define which roles in Human Resources will receive hire related notifications.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Hire Notification** > **Hire Notifications**

This example illustrates the fields and controls on the Hire Notifications page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Ready To Hire Notifications	Enter any role query names that should receive a notification that a person is ready to be hired. The system comes with the delivered role query ROLE_HIRE_NOTIF.
Error Notifications	Enter any role query names that should receive a notification when there is an error in the push of profile data to HR. The system comes with the delivered role query ROLE_HIRE_NOTIF.

You can define a query by navigating to **Reporting Tools** > **Query** > **Query Manager.**

Defining Employee Identification

To set up the employee identification tables, use the Supporting Documents (SUPPORT_DOC_TABLE), Visa/Permits (VISA_PERMIT_TABLE), and Driver's License Type (DRIVE_LIC_TBL) components.

This topic discusses how to define visas and work permits.

Pages Used to Define Employee Identification

Page Name	Definition Name	Usage
Supporting Documents Page	SUPPORT_DOC_TABLE	Set up codes for the types of documents required to obtain visas and permits for employees and their dependents, such as birth certificates, letters of employment, and marriage certificates.
Visa/Permits Page	VISA_PERMIT_TABLE	Define visas, work permits, and associated supporting documents that governments require for noncitizens to work in the countries where your organization does business.
Driver's License Type Page	DRIVE_LIC_TBL	Enter the types of licenses that you are tracking.

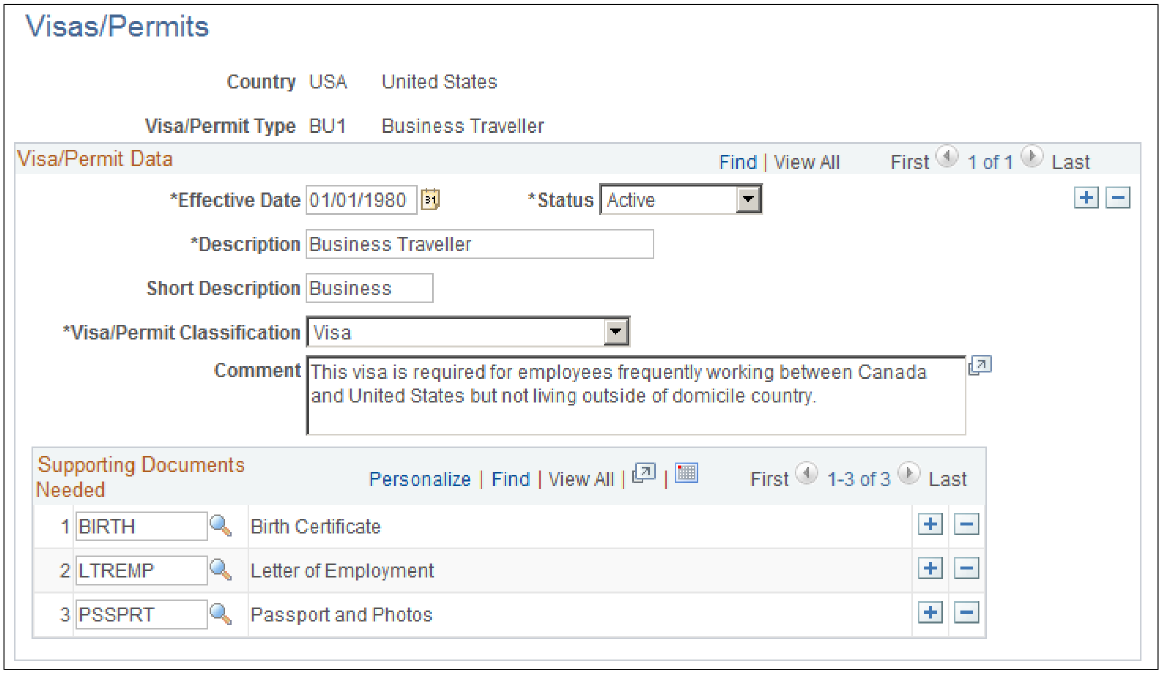
Visa/Permits Page

Use the Visa/Permits page (VISA_PERMIT_TABLE) to define visas, work permits, and associated supporting documents that governments require for noncitizens to work in the countries where your organization does business.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Visas/Permits** > **Visa/Permits**

This example illustrates the fields and controls on the Visa/Permits page. You can find definitions for the fields and controls later on this page.



You must have previously defined the visa or permit classifications on the Supporting Documents Table page.

Field or Control	***Description***
Visa/Permit Classification	Select the appropriate visa or permit classification, if applicable.
Supporting Documents Needed	Select the appropriate supporting documents needed to obtain the visa or permit.

Setting Up Remote Worker Configurations

With remote work becoming more common for many organizations, the Fluid Remote Worker functionality in Human Resources enables you to track jobs, positions, and workers that are allowed to work remotely. This information is also useful for U.S. customers that may base local or state tax based on a person's typical work location.

Remote Worker functionality uses the following frameworks to deliver a robust method of recording and tracking remote work:

- Configurable Search
- Activity Guide Composer
- Acknowledgement Framework

- Questionnaire Framework
- Attachments/Notes
- Approvals

To configure Fluid Remote Worker installation settings and capabilities, use the Remote Worker Configuration (HR_RW_CONFIG) component.

These videos provide an overview of the Fluid Remote Worker feature:

Video: Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker

Video: PeopleSoft Remote Worker

This topic lists prerequisites to using the Remote Worker feature and discusses configuring the Fluid Remote Worker functionality.

Related Links

"Setting Up Search Configuration" (Application Fundamentals)
"Understanding the Activity Guide Composer" (Enterprise Components)
"Understanding the Acknowledgement Framework" (Enterprise Components)
"Understanding Questionnaire Framework" (Enterprise Components)
"Configuring Attachments in Fluid Framework" (Application Fundamentals)
"Configuring Attachments" (Application Fundamentals)
"Understanding the Approval Framework Feature" (Approval Framework)
"Understanding Approvals" (Application Fundamentals)

Pages Used to Set Up Remote Worker Configurations

Page Name	***Definition Name***	***Usage***
Remote Worker Configuration Page	HR_RW_CONFIG	Define Remote Worker settings by regulatory region, including identifying approval options and reasons for working remote.

Remote Worker Prerequisites

Before you can use the Fluid Remote Worker functionality for your employees and contingent workers, you must:

1. Define the remote worker configurations for each regulatory region that allows remote work on the Remote Worker Configuration Page.
2. Assign remote worker roles to the users.

   Perform the following to grant access to the tiles and pages on the following home pages:

Access	***Role***	***Comments***
Employee Self Service home page > “Remote Worker Tile (for Employees)” (PeopleSoft eProfile)	*Fluid Remote Worker Employee*	The tile will only appear on the Employee Self Service home page when at least one of the following is in place: • The employee's job or position has been designated as eligible for telework. • The Remote Worker Configuration settings override the position or job telework eligibility.
Manager Self Service home page > “Remote Worker Tile (for Managers)” (PeopleSoft eProfile Manager Desktop)	*Fluid Remote Worker Manager*	
Workforce Administrator home page > Remote Worker Tile (for Administrators)	*Fluid Remote Worker Admin*	

Note: When granting the manager or administrator roles, the corresponding tiles will automatically appear on the correlating home page.

3. (Optional) Identify jobs and positions eligible for remote work arrangements.

   When the telework option is selected for either the job or position, the Employee Self Service home page will display the Remote Worker tile when the employee has the *Fluid Remote Worker Employee* role.

   Select the **Available for Telework** option on the following pages:

   - To indicate that a job is available for remote work: Job Code Table - “Job Code Profile Page” (Application Fundamentals), USA section.
   - To indicate that a position is available for remote work: (Classic) “Position Data - Specific Information Page” (PeopleSoft Human Resources Manage Positions) or (Fluid) “Manage/Create Position - Position Data Page” (PeopleSoft Human Resources Manage Positions).

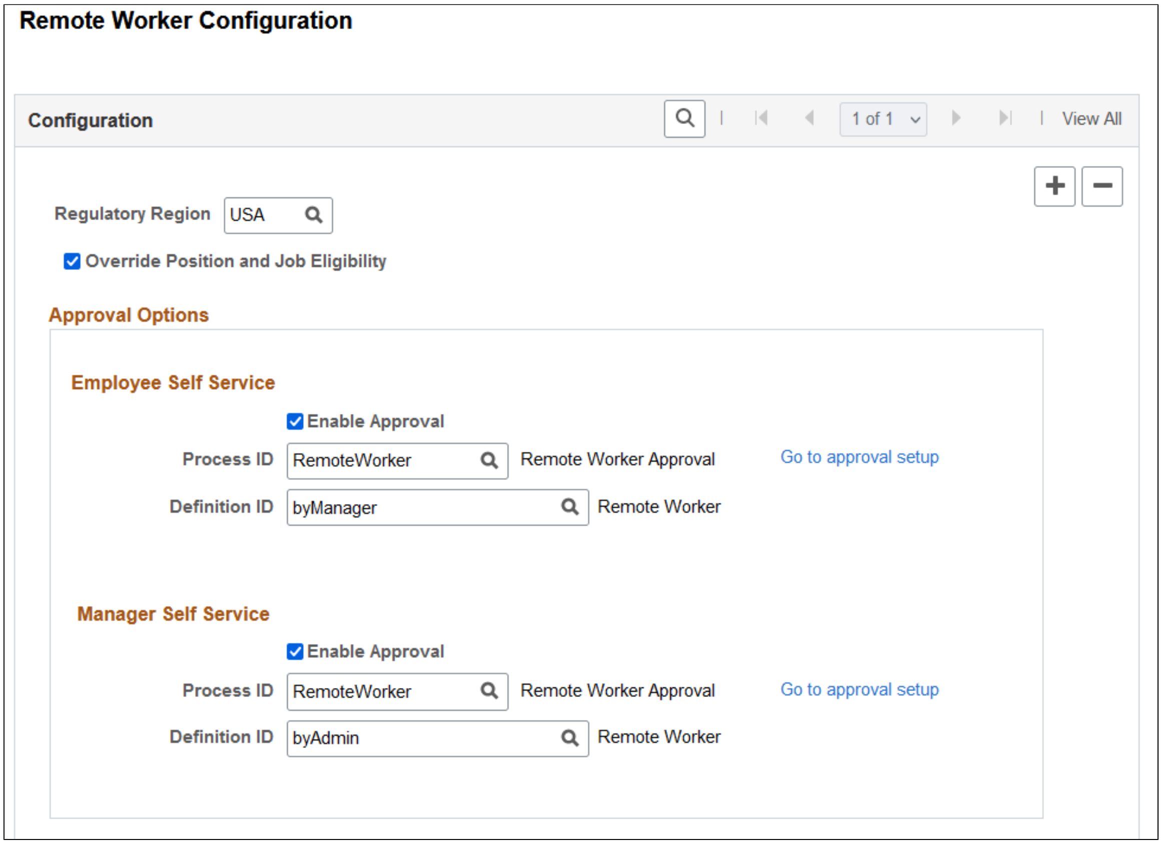
Remote Worker Configuration Page

Use the Remote Worker Configuration page (HR_RW_CONFIG) to define Remote Worker settings by regulatory region, including identifying approval options and reasons for working remote.

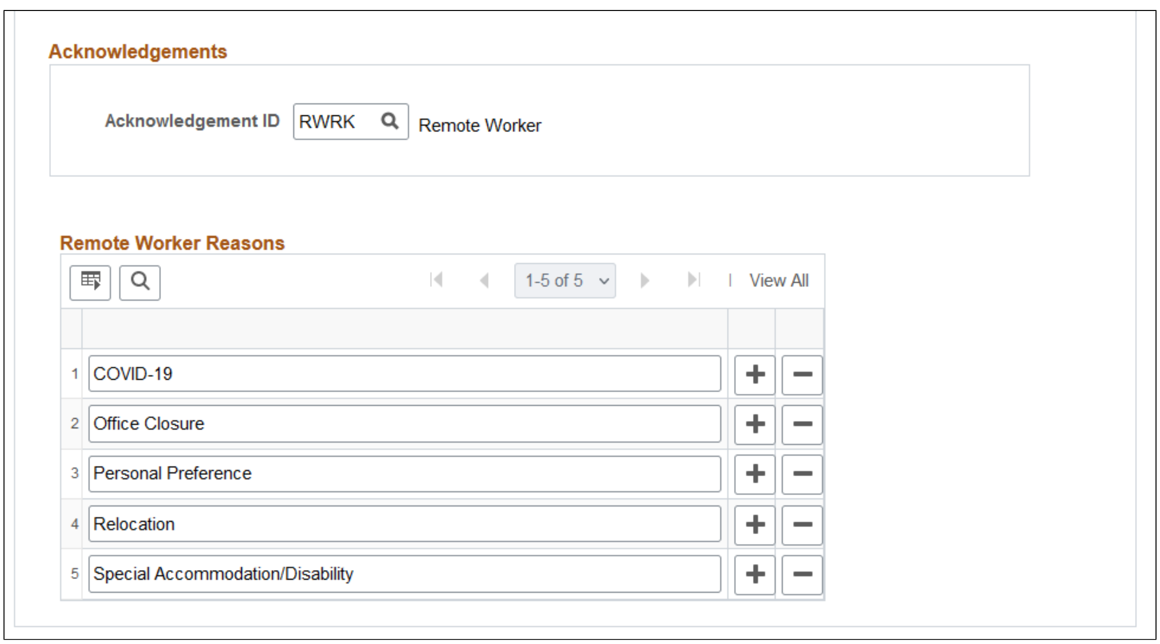
Navigation:

Set Up HCM > **Install** > **Product Specific** > **Remote Worker Configuration** > **Remote Worker Configuration**

This example illustrates the fields and controls on the Remote Worker Configuration page (1 of 2).



This example illustrates the fields and controls on the Remote Worker Configuration page (2 of 2).



Field or Control	***Description***
Regulatory Region	Enter the regulatory region to which these remote worker settings apply. To add additional regulatory regions, insert a new row.
Override Position and Job Eligibility check box	Select this check box to enable the Remote Worker tile on the Employee Self Service home page for employees that have the *Fluid Remote Worker Employee* role, even if their job or position is not defined to allow telework. When you deselect this option, the employee tile will only appear for those whose job or position are eligible for telework.

Approval Options

Use this section to configure approval related information for Fluid Remote Worker. You can indicate if approval is needed for the employee (**Employee Self Service**) or manager (**Manager Self Service**) to submit a remote work request.

Note: Approvals need to be enabled to use this functionality.

Field or Control	***Description***
Enable Approval	Select to require approvals for the following: • An employee submits a remote worker request from the **Employee Self Service** - Remote Worker tile and pages. • A manager submits a remote worker request for an employee from the **Manager Self Service** - Remote Worker Manager tile and pages.

Field or Control	*Description*
Process ID	The **Process ID** field is required if you have enabled the approval option. Associate the approval process ID that should be used when making an employee request (**Employee Self Service**) or making a request on behalf of the employee (**Manager Self Service**). When you enable the approval check box, the process ID will prepopulated with the *RemoteWorker* transaction, but you can override this. **Note:** You can associate the same process ID for the employee or manager approval options. If you enter your own approval process definition ID for creating a new row or for updating existing data, you will also need to update the Approval Process definition (“Defining the Setup Process Definitions Component” (Approval Framework)), the Page Composer setup (“Understanding Page Composer” (Enterprise Components)), and Mobile Approvals options.
Go to approval setup	Click this link to open a new browser window and access the approval setup “Register Transactions Page” (Approval Framework). You can then view or update the existing registered approval transaction setup for the process ID you entered. When no ID is entered, the system will direct you to the Register Transactions search page where you can review all transaction registries.
Definition ID	Enter the definition ID to be used to process the approval for either the employee or manager.

On the submission of a transaction, the approval chain will appear on the following pages:

- Remote Worker Confirmation Page
- Remote Worker Request Page, through the **Approval Chain** column and link.

  Status values on this page reflect the statuses as applicable for approvals.
- Pending Approvals - Remote Worker Page

Acknowledgements

Field or Control	*Description*
Acknowledgement ID	Enter the ID containing the message catalog entry for remote worker acknowledgement. You create acknowledgement IDs on the “Acknowledgement Configuration Page” (Enterprise Components). See also “(Employee) Remote Worker Request - Acknowledgement Page” (PeopleSoft eProfile).

Remote Worker Reasons

Enter the valid reasons a person may be allowed to work remote.

Setting Up Military Rank Structure

To set up military rank structure tables, use the Military Service Components (MIL_SVC_COMPONENT), Military Component Categories (MIL_CMP_CAT_DEFN), Military Service (MIL_SERVICE_DEFN), Military Worn Rank Types (MIL_WRN_TYPE_DEFN), and Military Skill Grades (MIL_SKL_GRD_DEFN) components.

These topics provide an overview of and setting up military ranking structure.

Pages Used to Set Up Military Rank Structure

Page Name	*Definition Name*	*Usage*
Service Components Page	MIL_SVC_CMP_DEFN	Enter military service types (Regular, Active Reserve, Inactive Reserve or Emergency Reserve, or Guard, for example).
Component Categories Page	MIL_CMP_CAT_DEFN	Create military component type categories that further define service components (Supplemental, Weekend Training, or Permanent, for example).
Military Service - Service Definition Page	MIL_SERVICE_DEFN	Define military service details by associating service components and categories to a military service and country.

Page Name	***Definition Name***	***Usage***
Military Service - Service Ranks Page	MIL_SERVICE_RANKS	Define service ranks that you will later associate with military service members. Identify the hierarchy and structure of the ranks within a specified military service.
Salary Grades - Military Ranks Page	MIL_RANK_GRADE_SEC	Select the salary plans and grades that fit the pay attributes of a rank.
Worn Rank Types Page	MIL_WRN_TYPE_DEFN	Identify rank insignias that a service member is allowed to wear on his uniform while serving in a particular post.
Skill Grades Page	MIL_SKL_GRD_DEFN	Create skill grade levels for which a service member can be evaluated. Skill grades, along with ranks, may be components of someone's pay and relevant in some payroll processing systems.

Understanding Military Ranking Structure

In a military organization, rank defines the hierarchy and organization of its personnel and represents seniority and command. Rank is also an attribute used to drive pay and is used in force planning, reporting, movement, and assignments. Once military functionality is enabled on the Installation table and the military tables set up in the PeopleSoft Human Resources system, you can associate military service and rank with jobs and positions or track the movement of service members between active (or inactive) duty, reserve call-ups, and so forth in Job Data.

PeopleSoft Human Resources provides the Military Service table to track the various services, ranks, and hierarchical structures for a country (for example, the U.S. has four services that have different ranks and structures). Within this table, military organizations can use sequence numbers and the National Atlantic Treaty Organization (NATO) rank codes to define a service structure's order for ranks. Rank structure is also broken down according to the following rank categories: Officers (OF), Other Ranks (OR), and Warrant Officers (WO). Within each of the three rank categories, ranks are graded numerically, as shown in this table:

Rank Category	***Numerical Grade***	***Details***
Officers	OF-01 to OF-10	

Rank Category	***Numerical Grade***	***Details***
Other Ranks	OR–01 to OR–09	Other Ranks may include a sub-categorization of Non-Commissioned Officer or Enlisted personnel. These sub-categorizations vary by country. For NATO purposes, rank grades OR-05 to OR-09 inclusive are considered to be Non-Commissioned Officers.
Warrant Officers	1 to 4	Typically represent a hierarchy between non-commissioned officers and commissioned officers.

Military organizations use the general salary plan tables to set up the general salary structures, for example Officers, Warrant Officers, Enlisted salary and other structures. Once salary plans and grades are established in the system, an organization can assign different salary grades to a rank for the purpose of calculating pay and seniority. When an individual is assigned a rank in Job Data, only those salary grades associated with their rank or worn rank are eligible pay structures.

Recording Rank Changes in Profile Management

PeopleSoft delivers the *RANK* content type to integrate a person's job with the Manage Profile feature. A profile integration update service, when set up accordingly in the Event Manager, updates a person's profile in Manage Profiles from Job Data when there's a rank change.

See “Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles).

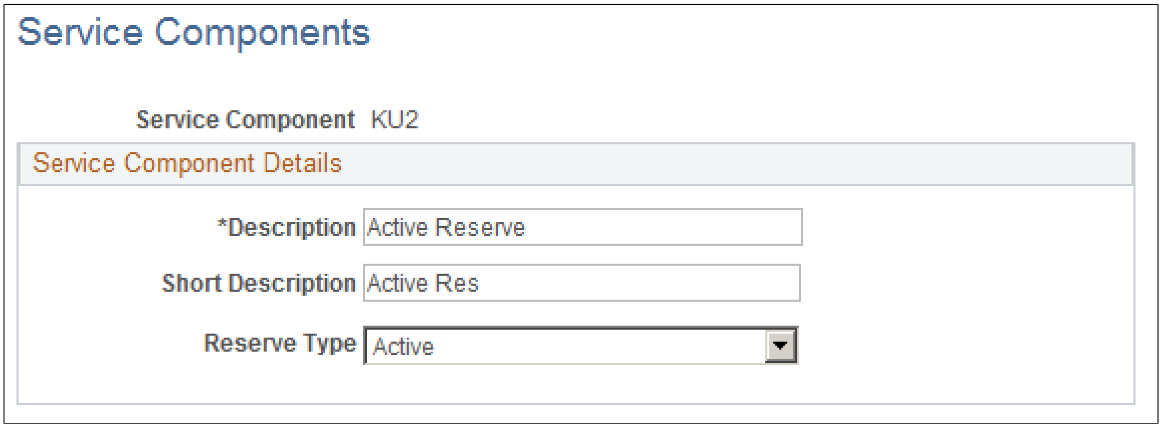
Service Components Page

Use the Service Components page (MIL_SVC_CMP_DEFN) to enter military service types (Regular, Active Reserve, Inactive Reserve or Emergency Reserve, or Guard, for example).

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Service Components** > **Service Components**

This example illustrates the fields and controls on the Service Components page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Reserve Type	Identify if this service component is part of a military reserve force. Valid values are *Active, Inactive,* or *Not Applicable.*

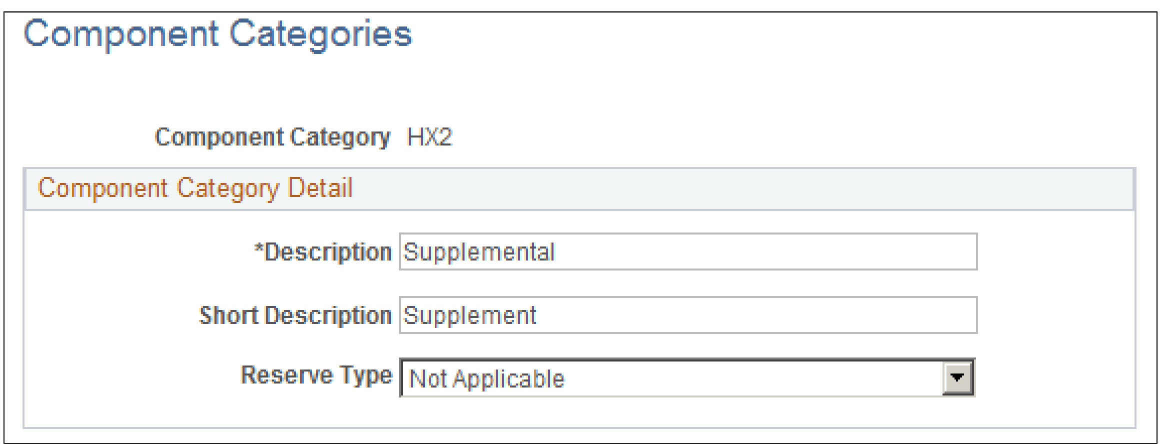
Component Categories Page

Use the Component Categories page (MIL_CMP_CAT_DEFN) to create military component type categories that further define service components (Supplemental, Weekend Training, or Permanent, for example).

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Component Categories** > **Component Categories**

This example illustrates the fields and controls on the Component Categories page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Reserve Type	Identify if this service component category is part of a military reserve force. Valid values are *Active, Inactive,* or *Not Applicable.*

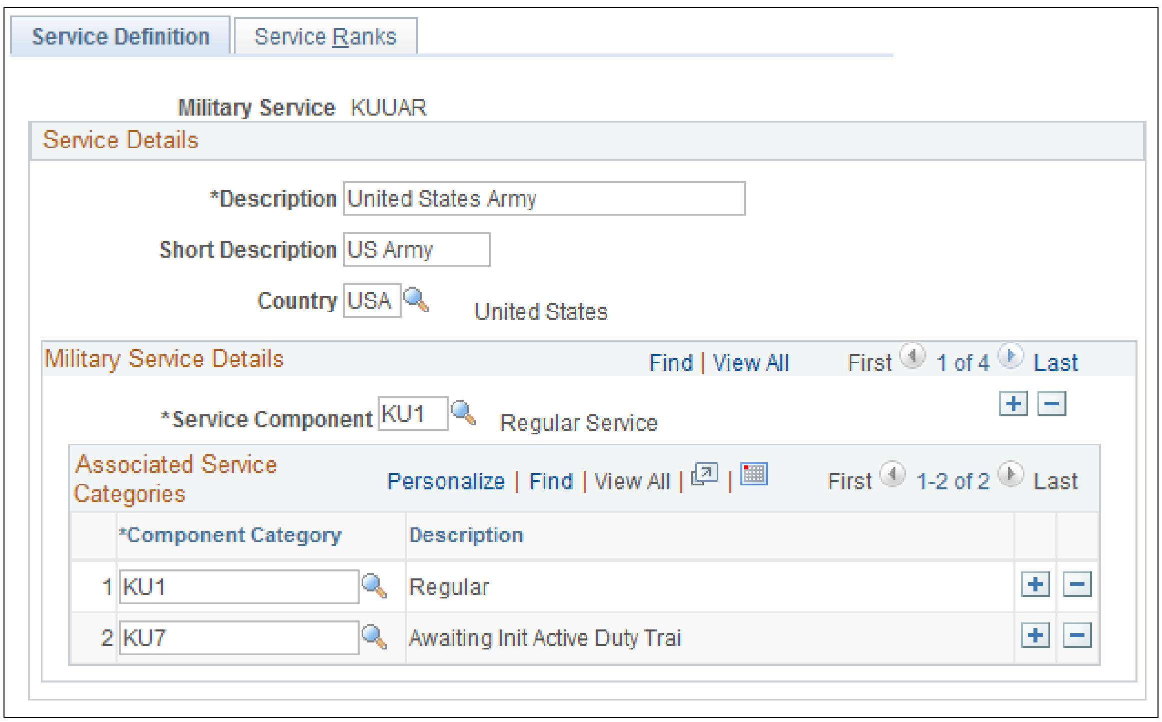
Military Service - Service Definition Page

Use the Service Definition page (MIL_SERVICE_DEFN) to define military service details by associating service components and categories to a military service and country.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Service** > **Service Definition**

This example illustrates the fields and controls on the Service Definition page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Country	Enter the country to which this military service applies.
Service Component	Select one or multiple service components related to this military service. When a user associates a military service with a position or military service member, only those service components associated with that military service are available to the user.

Field or Control	***Description***
Component Category	Associate service categories to service components. When a user associates a service component with a military service member, only those component categories associated with that service component are available to the user.

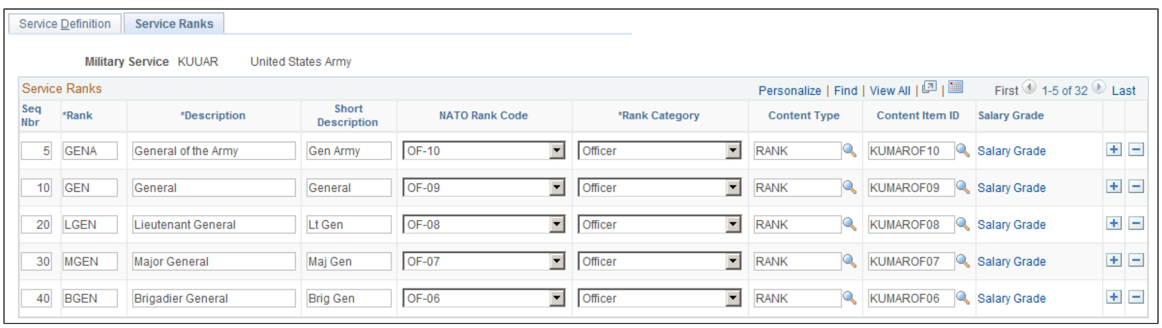
Military Service - Service Ranks Page

Use the Service Ranks page (MIL_SERVICE_RANKS) to define service ranks that you will later associate with military service members. Identify the hierarchy and structure of the ranks within a specified military service.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Service** > **Service Ranks**

This example illustrates the fields and controls on the Service Ranks page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Seq Nbr (sequence number)	Specify the overall rank sort order to specify the military's hierarchical structure. This field enables users to sort rank codes where these service ranks have the same NATO ranks, such as the OF-1 (1st and 2nd Lieutenant ranks). This field also enables you to specify individual rank order sequences for military services that are not part of the NATO structure and hierarchy.
Rank	Define rank code designations specific to this military service.
NATO Rank Code	Select the NATO code associated with this rank, if available. Valid values are provided using translate values. This field is optional since it does not apply to all militaries, such as the US Warrant Officer rank categories. The system displays a warning message upon saving if the NATO rank code is blank and the **Military Rank Category** is *Officer* or *Other Ranks.*

Field or Control	***Description***
Rank Category	Categorizing ranks based on NATO's definitions. Valid values are *Officer, Other Ranks,* and *Warrant Officer.*
Content Type	Enter the content type that defines the rank (for example, rank, competency, degree). The PeopleSoft system delivers the content type *RANK* to record ranks. When a military service member's rank is updated in Job Data, the system will update that person's profile, if an organization has set up the Event Manager accordingly. See “Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles).
Content Item ID	Select a content item that further defines the RANK content type. The system uses this information to manage a person's job profile. See .“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)
Salary Grade	Click to access the Salary Grades - Military Ranks page and define which salary plans and grades fit the pay attributes of this respective rank code.

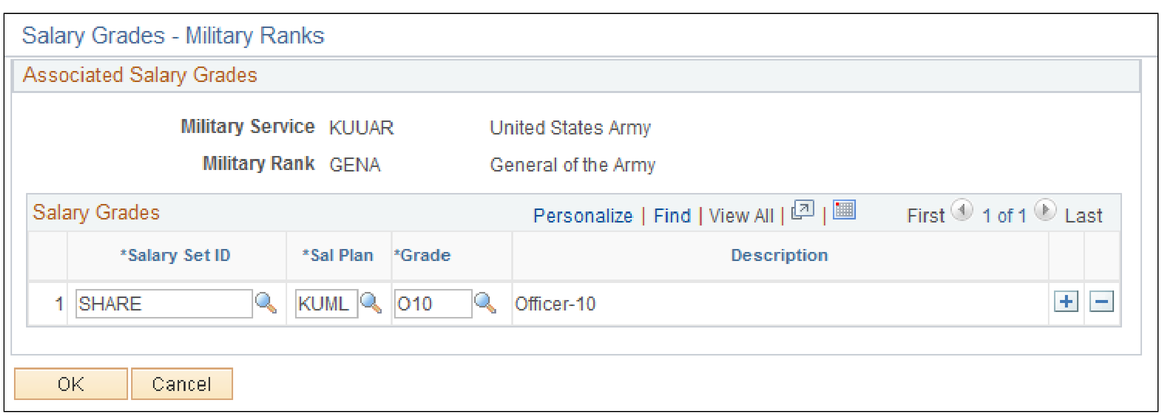
Salary Grades - Military Ranks Page

Use the Salary Grades - Military Ranks page (MIL_RANK_GRADE_SEC) to select the salary plans and grades that fit the pay attributes of a rank.

Navigation:

Select the **Salary Grade** link on the Service Ranks page.

This example illustrates the fields and controls on the Salary Grades - Military Ranks page. You can find definitions for the fields and controls later on this page.



When a rank is associated with a service member, the system returns only those salary plans and grades that are applicable to the rank, as defined on this page.

Setting Up Military Rank Change Notification and Documentation

To set up military rank change notification and documentation tables, use the Military Processing Definition (MIL_RANK_CHNG_PROC), Military Rank Change Status (MIL_RANK_CHNG_STAT), Military Rank Change Template (MIL_RANK_CHNG_TMPL), and Clone Military Rank Template (MIL_RNK_CLONE_TMPL) components.

These topics provide an overview of and setting the military change rank and notification process.

Pages Used to Set Up the Military Rank Change and Notification Process

Page Name	***Definition Name***	***Usage***
Military Processing Definition Page	MIL_RANK_CHNG_PROC	Define military rank change processing rules. Determine the service member unit commander, who will be used as the final approver in the rank change approval process. Use this page to turn on the approval process and enable prenotification of a rank change.
Rank Change Status MIL Page	MIL_RANK_CHNG_STAT	Specify the allowable Action table values for change rank processing. Only those action and disposition status combinations defined here are available for military rank change templates and requests.
Military Rank Change Template - Template Definition Page	MIL_TMPL_DEFN	Create a military rank change template definition. Define the template name, description, and any comments that will help to describe when this template should be used.

Page Name	*Definition Name*	*Usage*
Military Rank Change Template - Template Change Control Page	MIL_TMPL_CHNG_CNTL	Enter military rank change control criteria. This page enables you to define default specific personnel action and reason values as well as the rank change status values (New, Amendment, Cancel by Command, Cancel by Admin) to be associated with the template. Enter default values for the authorizing organization's business unit and department as well as the position or user role that should be used when determining the responsible career manager. The system will use these values to populate the Military Rank Change page fields in the Military Rank Change component.
Military Rank Change Template - Notifications Page	MIL_TMPL_NOTIFY	Specify the stakeholder notification details such as default roles that should be associated with a template and indicate when to start the approval and notification process.
Clone Military Rank Template Page	MIL_RNK_CLONE_TMPL	Clone a military rank change template by identifying an existing a rank change template to copy and entering the new template ID you wish to create.

Understanding the Military Change Rank and Notification Process

The Military Rank Change process enables you to track the various states of military service member rank changes, notify stakeholders that are involved in the process using Approval Framework, and generate official documentation. If your organization has elected to require approval processing using the Rank Change process, then upon completion of the last approval, and when the date of the rank change arrives, the system will insert a new row into the service member's Job Data to reflect the rank change using the component interface CI_JOB_DATA.

Since rank change requests often happen months in advance of the actual approval process, the system enables you to record military rank change requests, amendments, and cancellations without having enter this information in Job Data. When approval processing is enabled, the system will send out rank change transaction notifications on a predefined date to stakeholders; stakeholders can be identified as either reviewers or approvers. Approvers will then access the self service pages to approve or deny the request.

The PeopleSoft HR application delivers several setup tables to support the rank change approval and notification process. These tables are available through these components:

- Military Processing Definition

  Use this component to identify the method used to access the employee-manager reporting structure for determining the unit commander with final approval. Also, this is the location you can enable the approval and prenotification process. When the approval process is not enabled in this component, the rank changes will automatically be applied to Job Data without requiring approvals when the Rank Change Application Date arrives.

- Military Rank Change Status

  Use this component to specify a subset of valid actions and related statuses that can be used in a rank change request, since the final rank change promotion or demotion will be written to Job Data and requires an **Action** value. You can also opt to include this action and status for prenotification or whether to apply it to Job Data. Here, the system can also calculate the Early Promotion Date that's written to the Job Data row. Only the actions specified in this component will appear as a rank change option.

- Military Rank Change Template and Clone Military Rank Template

  Use these components to create templates that enable users to default as much data as possible into the Military Rank Change component for a service member rank change request. This ensures that entering data is a quick and easy process. Use the cloning component to copy an existing template to streamline the template creation process.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Related Links

Managing Military Rank Change Requests

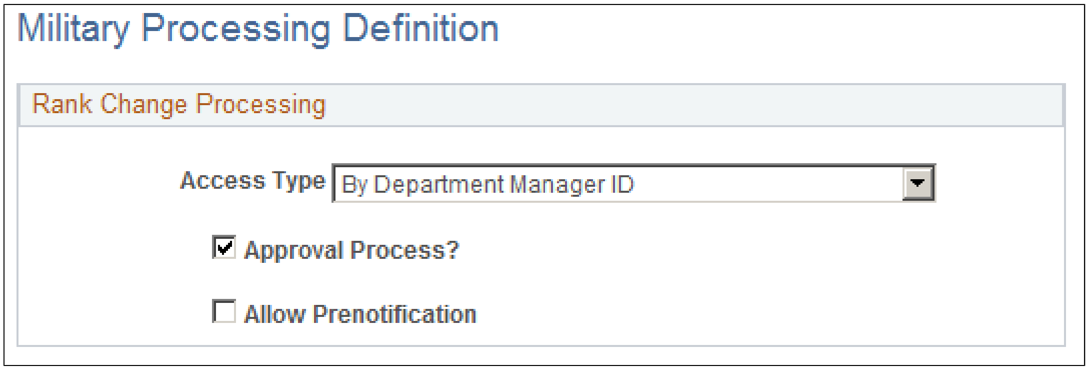
Military Processing Definition Page

Use the Military Processing Definition page (MIL_RANK_CHNG_PROC) to define military rank change processing rules. Determine the service member unit commander, who will be used as the final approver in the rank change approval process. Use this page to turn on the approval process and enable prenotification of a rank change.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Processing Definition** > **Military Processing Definition**

This example illustrates the fields and controls on the Military Processing Definition page. You can find definitions for the fields and controls later on this page.



Use this page to identify how the system will determine the unit commander role for the approval and workflow notification process. When using the approval process, the unit commander is the final approver. You will also use this page to identify if you want the system to require approvals for rank change or use the prenotification process.

Field or Control	***Description***
Access Type	Select the access type that best fits how the unit commander structure for your organization is determined. This is the final approver for a service member's rank change. Valid values are *By Department Manager ID, By Dept Security Tree* (by department security tree), *By Group ID, By Part Posn Mgmt Dept Mgr ID* (by partial position management department manager ID), *By Part Posn Mgmt Supervisor* (by partial position management supervisor), *By Reports To Position,* and *By Supervisor ID.* See “Setting Up Access to Direct Reports Data” (Application Fundamentals), “Configuring Direct Reports Functionality” (Application Fundamentals).
Approval Process?	Select this check box if the unit commander approval is needed to process a new or amended rank change and have the system apply these changes to Job Data. If approval is not required to process the rank change and update Job Data on the specified date, deselect this check box.

Field or Control	*Description*
Allow Prenotification	Select this check box to enable the Prenotification process and have the system notify stakeholders in advance of a rank change being made to Job Data. This function provides stakeholders with another opportunity to review the service member's rank change before Job Data is updated. Coordination with the career manager and manual intervention would be required at this point to stop the system from processing the rank change. The actual prenotification date is defined on the Stakeholder page of the Military Rank Change component for the person receiving the rank change. **Note:** If the **Application Date** field on the Military Rank Change page of the Military Rank Change component is not populated, the prenotification date on the Stakeholder page will not be populated and therefore not picked up by the prenotification process. Prenotification messages operate independently of Approval Framework, and it does not register an Approval Framework event. You can access the Prenotification for Mil Rank (MIL_NOTIFY_AE) Application Engine process by navigating to **PeopleTools** > **Process Scheduler** > **System Process Requests.**

See Military Rank Change - Stakeholder Page.

Rank Change Status MIL Page

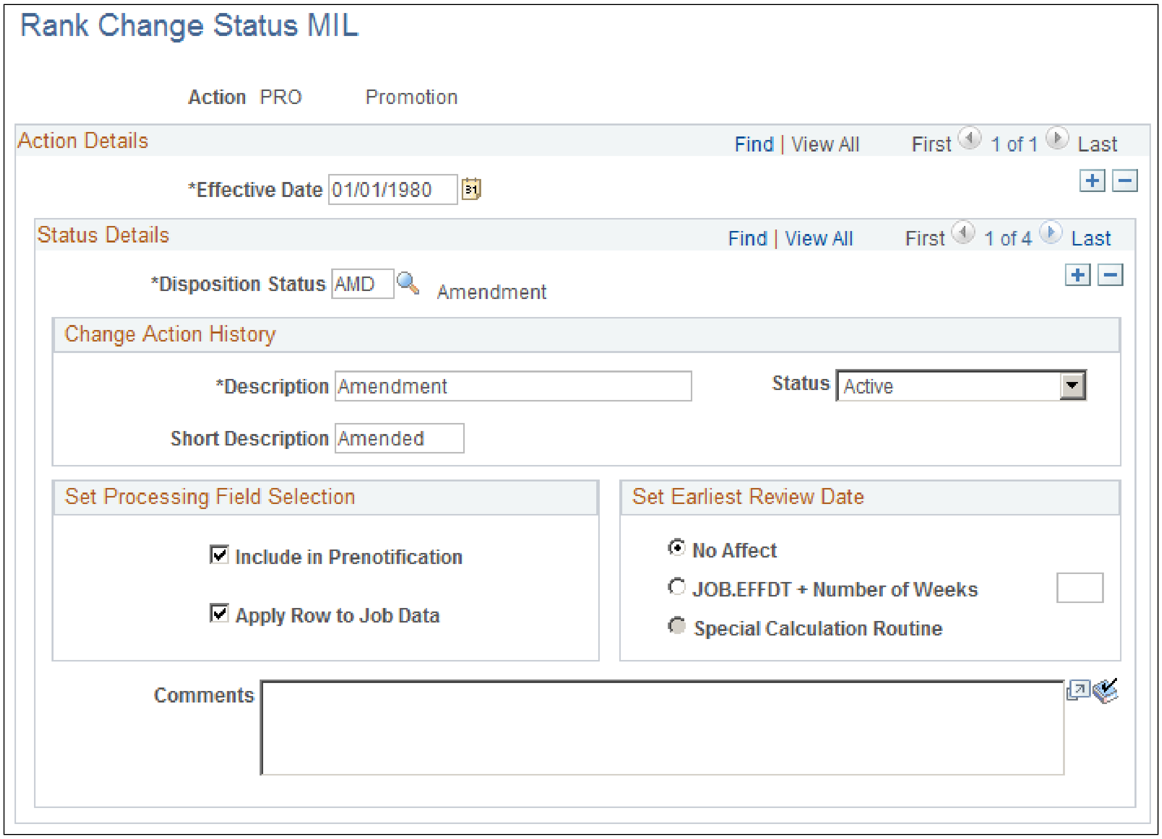
Use the Rank Change Status MIL page (MIL_RANK_CHNG_STAT) to specify the allowable Action table values for change rank processing.

Only those action and disposition status combinations defined here are available for military rank change templates and requests.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Rank Change Status** > **Rank Change Status MIL**

This example illustrates the fields and controls on the Rank Change Status MIL page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Action	Select a value from the Action table that can be used for military rank change requests.
Disposition Status	Enter the disposition statuses eligible for this action type. Only those action and rank change disposition status combinations defined here are available for selection in the **Action** and **Disposition Status** fields on the Template Change Control page for military rank change templates or Military Rank Change page to record a service member's rank change request. Valid values are *AMD* (Amendment), *CNA* (Cancel by Administrator), *CNC* (Cancel by Command), and *NEW* (new).

Change Action History

Identify the rank change status descriptions that the system will display to a user during the Rank Change process. You can also activate or inactivate a specific disposition status for the action.

Set Processing Field Selection

Use this section when configuring prenotification and the push of rank change requests to Job Data for an action and disposition status combination.

Field or Control	***Description***
Include In Prenotification	Select this check box to generate a prenotification for stakeholders when a person has this action and disposition status combination. If this check box is not selected, prenotification will not be generated for stakeholders. **Note:** Prenotification must be enabled on the Military Processing Definition page in order for prenotification to occur.
Apply Row to Job Data	Select this check box to have the system push the rank change request to Job Data. If this check box is not selected, the system will not apply the rank change to Job Data. For example, a cancellation of a rank change request would not need to be recorded in Job Data, and therefore would have this check box deselected.

Set Earliest Review Date

Use this section to determine how the system should calculate the **Early Promotion Date** field value on the Job Data - Employment Information page use after the rank change row has been inserted into Job Data.

Field or Control	***Description***
No Affect	Select this if there is no impact to the earliest review date when the Job Data row is inserted. This is the default value selection.
JOB.EFFDT + Number of Weeks (job effective date plus number of weeks)	Select this option to calculate a review date using the effective-date of the rank change row in Job Data plus the number of weeks specified here. If this option is selected, you must also enter the number of weeks (up to a 3-digit number) in the edit box after this field. The system uses this date to populate the **Early Promotion Date** on the Job Data - Employment Information page. In the case of a demotion or reversal, you may need to enter a negative number. **Note:** To use this option, you must enter an **Application Date** value on the Military Rank Change page.

Field or Control	Description
Special Calculation Routine	Select this option if your organization has created their own customized calculations. The PeopleSoft application does not deliver calculations for this field.

Military Rank Change Template - Template Definition Page

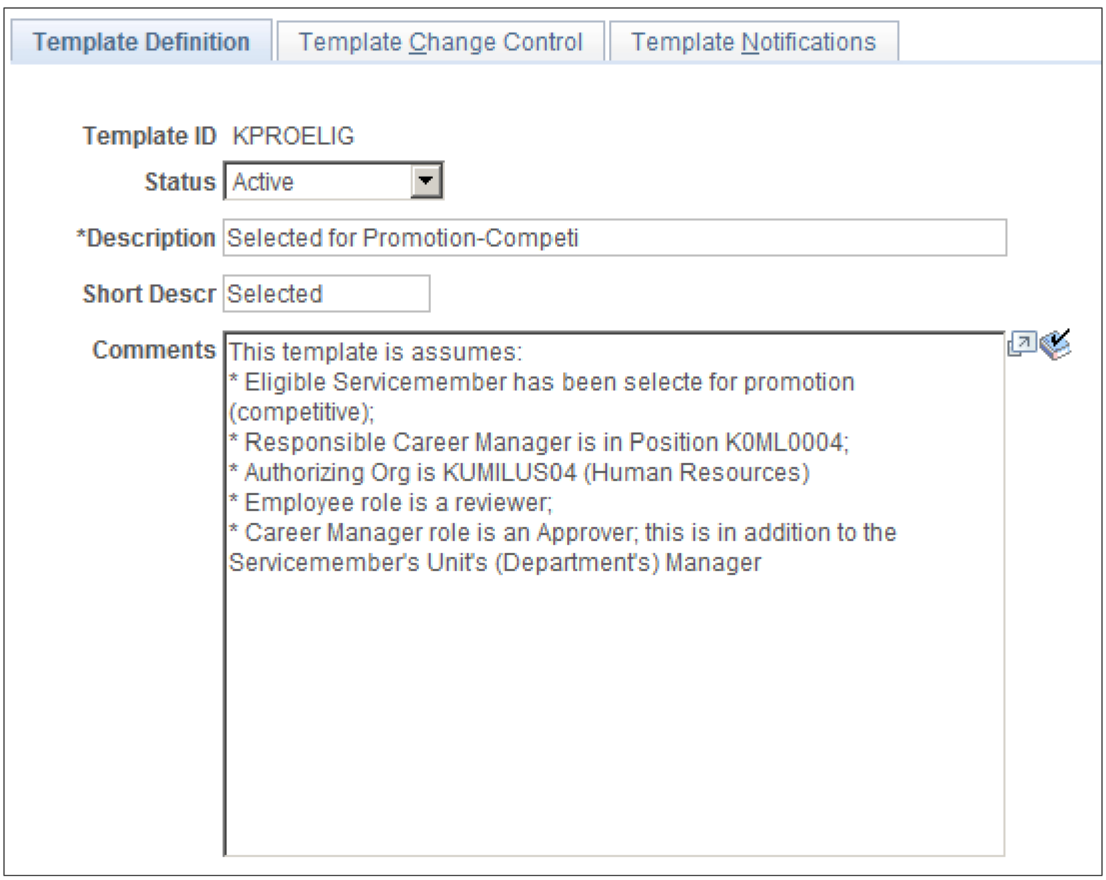
Use the Template Definition page (MIL_TMPL_DEFN) to create a military rank change template definition.

Define the template name, description, and any comments that will help to describe when this template should be used.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Rank Change Template** > **Template Definition**

This example illustrates the fields and controls on the Military Rank Change Template - Template Definition page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Template ID	Enter an ID (up to 15-characters) to uniquely identify this template.

Military Rank Change Template - Template Change Control Page

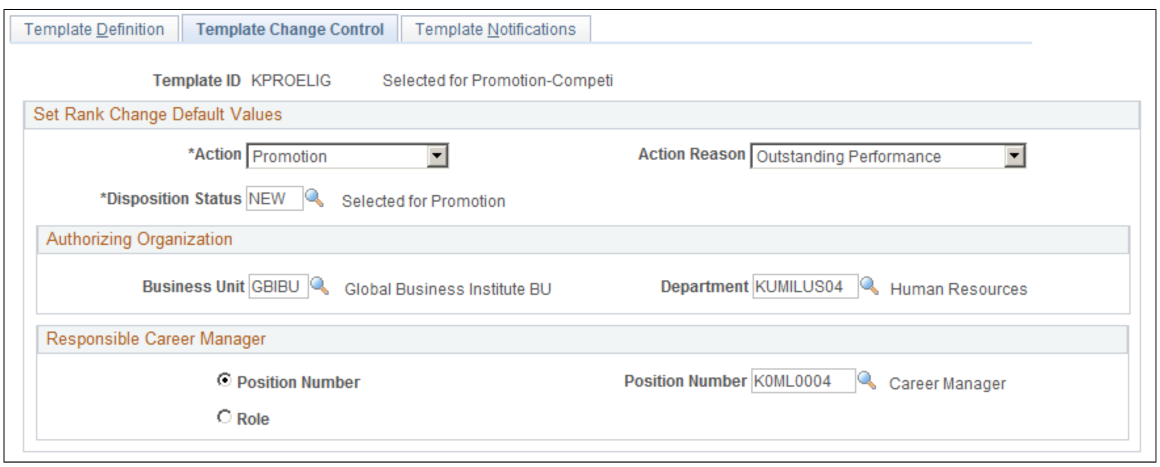
Use the Military Rank Change Template - Template Change Control page (MIL_TMPL_CHNG_CNTL) to enter military rank change control criteria.

This page enables you to define default specific personnel action and reason values as well as the rank change status values (New, Amendment, Cancel by Command, Cancel by Admin) to be associated with the template. Enter default values for the authorizing organization's business unit and department as well as the position or user role that should be used when determining the responsible career manager. The system will use these values to populate the Military Rank Change page fields in the Military Rank Change component.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Rank Change Template** > **Template Change Control**

This example illustrates the fields and controls on the Military Rank Change Template - Template Change Control page. You can find definitions for the fields and controls later on this page.



Use this page to define default values the system will use to populate fields in the Military Rank Change component when creating a rank change request. The only required fields for defaulting are **Action, Disposition Status,** and the **Responsible Career Manager** selection.

Field or Control	***Description***
Action	Select a default action value. Valid actions for rank changes are defined on the Rank Change Status MIL page.

Field or Control	***Description***
Reason	Select a default reason that will be associated with the action, if applicable. Valid reasons for actions are defined in the Action Reasons table.
Disposition Status	Select the disposition status that will be provided by default when using this template. Valid values are defined on the Rank Change Status MIL page for an action.
Business Unit and**Department**	Enter the authorizing organization's business unit and department for this template.

Responsible Career Manager

Use this selection to specify how the default career manager is derived. The system uses this information for notification purposes.

Field or Control	***Description***
Position Number and**Position Number**	Select this option if the career manager is decided by position. When you select this option, the **Position Number** field becomes available and you can enter the position number associated with the career manager for defaulting purposes or leave it blank.
Role and**Role Name**	Select this option if the career manager is decided by a role. When you select this option, the **Role Name** field becomes available and you can enter the name of the role associated with the career manager user ID for defaulting purposes or leave it blank.

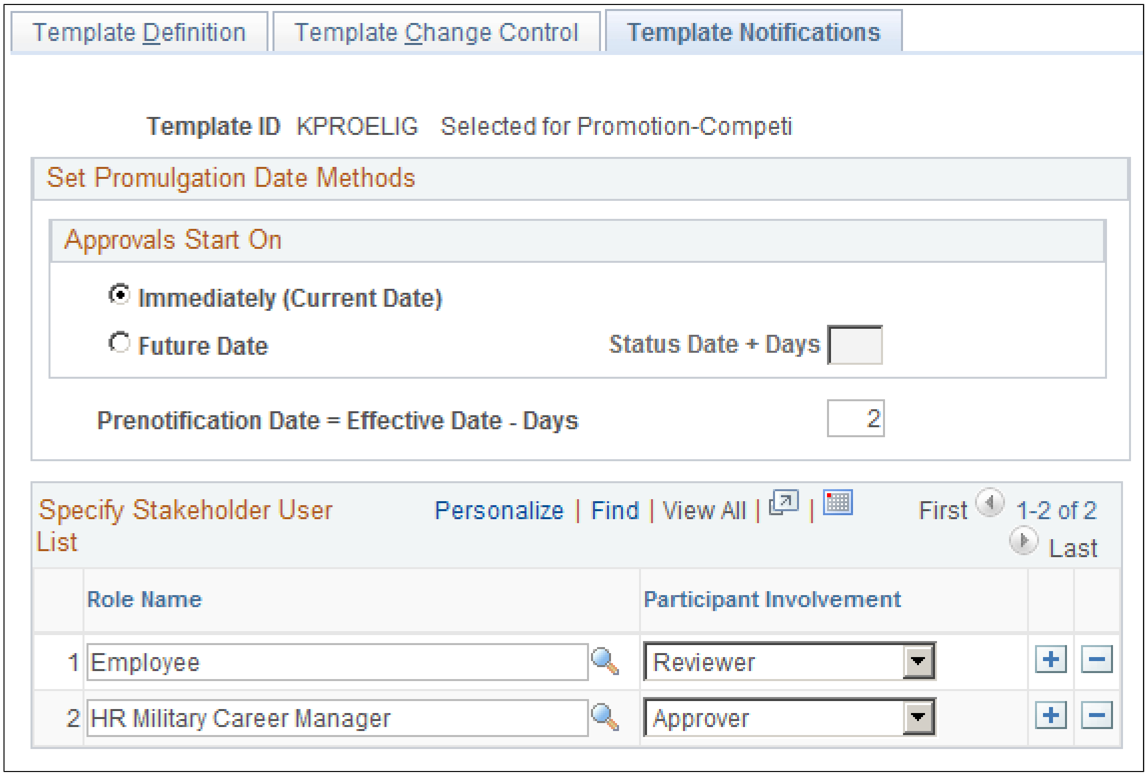
Military Rank Change Template - Notifications Page

Use the Template Notifications page (MIL_TMPL_NOTIFY) to specify the stakeholder notification details such as default roles that should be associated with a template and indicate when to start the approval and notification process.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Military Rank Change Template** > **Template Notifications**

This example illustrates the fields and controls on the Military Rank Change Template - Template Notifications page. You can find definitions for the fields and controls later on this page.



Use this page of the template to configure for an immediate start of the approval process (when the rank change request is saved) or configure the approval process to start on a future date, to be calculated by the system. This page also enables the user to associate a prenotification date, which is essentially a final notification to stakeholder that the rank change is being applied to Job Data.

Field or Control	***Description***
Immediately (Current Date)	Select this method to have the system populate the **Start Approvals On** field in the Military Rank Change component with the system date. This will start the approval process upon saving the request in the Military Rank Change component.

Field or Control	*Description*
Future Date and **Status Date + Days**	Select this method to have the system populate the **Start Approvals On** field in the Military Rank Change component with a future date based on the **Status Date** field value in the Military Rank Change component. When you select this option, the **Status Date + Days** field becomes available. Enter the number of days (up to two digits) the system should wait before sending out the approval notices. For example, you create a template indicating that approvals should be sent out on a future date. You enter 14 in the **Status Date + Days** field. Later, the HR manager enters a request for an employee rank using this template with a **Status Date** value of September 1. The system automatically populates the **Start Approvals On** field with the date of *September 15* on the Stakeholder page of the Military Rank Change component, 14 days after the status date of this request. The HR manager can accept this default value or override this value with another date.
Prenotification Date = Effective Date - Days	Enter the number of days prior to the rank change being applied to the person's Job Data record that the stakeholders should be notified of the change being made in the system. The system calculates the prenotification date using the **Application Date** value on the Military Rank Change page in the Military Rank Change component minus the number of days entered in this field. The system then enters this date in the **Prenotification Date** field on the Stakeholder page of the Military Rank Change component. The HR manager can accept this default value or override this value with another date when creating the rank change request. **Note:** Prenotification must be enabled on the Military Processing Definition page in order for prenotification to be performed.
Role Name	Identify the roles, or stakeholders, that should be notified in the rank change notification process.
Participant Involvement	Identify the level of involvement of the stakeholder. Values are *Approver* or *Reviewer*.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

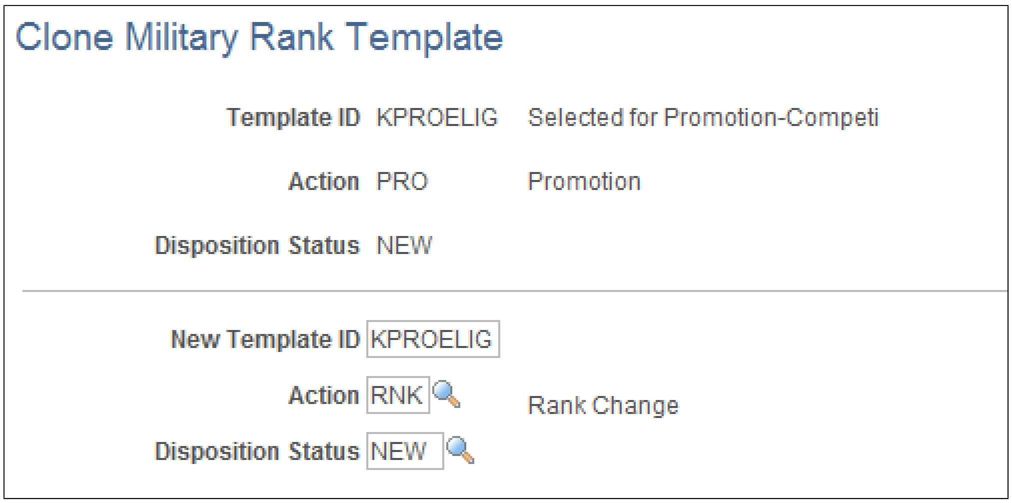
Clone Military Rank Template Page

Use the Clone Military Rank Template page (MIL_RNK_CLONE_TMPL) to clone a military rank change template by identifying an existing a rank change template to copy and entering the new template ID you wish to create.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data MIL** > **Clone Military Rank Template** > **Clone Military Rank Template**

This example illustrates the fields and controls on the Clone Military Rank Template page. You can find definitions for the fields and controls later on this page.



Use this page to copy an existing military rank template by selecting the existing template and then enter the new template ID, action, and disposition status. After saving, the system will open the Military Rank Change Template component, where you can then update fields related to this template.

Defining Additional Employment Setup Data

To set up the additional employment setup data tables, use the Ethnic Groups (ETHNIC_GROUP_GBL), Non-Employee Provider (NEE_PROVIDER_TBL), Religions (RELIGION_TBL_GBL), Supervisor Levels (SUPVSR_LVL_TBL), Temporary Duties (TEMP_DUTIES_TBL), Volunteer Organizations (VOLUNTEER_ORG_TBL), and Employee Labor Classification (EMPL_CLASS_TABLE) components.

These topics provide and overview of supervisor levels and discuss how to define ethnic groups.

Pages Used to Define Additional Employment Data

Page Name	***Definition Name***	***Usage***
Ethnic Groups Page	ETHNIC_GROUP_TBL	Define ethnic groups. Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.
Non-Employee Provider Page	NEE_PROVIDER_TBL	Define the provider, agency, or employer of a contingent worker. Link this information to a worker on the Employment Information page or Contract Data page.
Religions Page	RELIGION_TBL	Define religions.
Supervisor Levels Page	SUPVSR_LVL_TBL	Add and modify supervisor level data.
Temporary Duties Page	TEMP_DUTIES_TBL	Define or modify duty types for temporary assignments. This field only appears on the Job Code page of Job Data when the action is Temporary Assignment (TAS) and the Installation table has **Auto Job Suspend** selected. The value can indicate what type of duties are included in the assignment.
Volunteer Organizations Page	VOLUNTEER_ORG_TABL	Add volunteer organization data that your company recognizes or sponsors.
Employee Labor Classification Page	EMPL_CLASS_TABLE	Set up employee classes to further categorize your workforce. Employee classes are assigned on the Job Data - Job Information page (JOB_DATA_JOBCODE). (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification for workers. If your organization submits this report, you must use the required employee classes for the report to work correctly.

Understanding Supervisor Levels

Supervisor levels are a class of position such as Division Manager and Section Chief. They represent levels of some managerial or supervisory significance that bear responsibility for work above a certain level in order to achieve the organization's management goals.

The concept of employees' supervisor level is a central one in some places, such as Japanese companies' human resources management. It may or may not be related to an employee's "job." Companies usually use supervisor level as another type of employee identifier. Companies that do not use capability grades (or Job Management) may still require the tracking of supervisor levels. Many companies pay employees a component of pay related to their supervisor level.

Supervisor levels usually combine with departments to define positions or posts within an organization, as shown in this sequence of three tables:

Table 1: Supervisor Levels

This table lists the supervisor levels and their descriptions.

Supervisor Level	***Description***
01	Director
02	Senior Manager

Table 2: Departments

This table lists the department IDs and their descriptions.

Department ID	***Description***
100	Development
102	Development Section One
200	Sales
210	Sales - West Division

Table 3: Position, Supervisor Level, and Departments

This table lists the positions or posts and their corresponding supervisor levels and department IDs.

Position or Post	***Supervisor Level***	***Department ID***
Director of Development	01	100
Senior Manager of Development Section One	02	102
Director of Sales	01	200
Senior Manager of Sales - West Division	02	210

When you create or update employee Job records, you can enter the supervisor levels that you set up in the Supervisor Level table on the Job Information page. And, because supervisor level is an employee identifier just like job code, position, or manager level, it appears throughout the system. You can view it or enter it on many of the pages on which you can also view or enter job codes, positions, and manager levels. You can also view it on Job Summary and throughout the Plan Careers and Successions and Track Global Assignments business processes.

Ethnic Groups Page

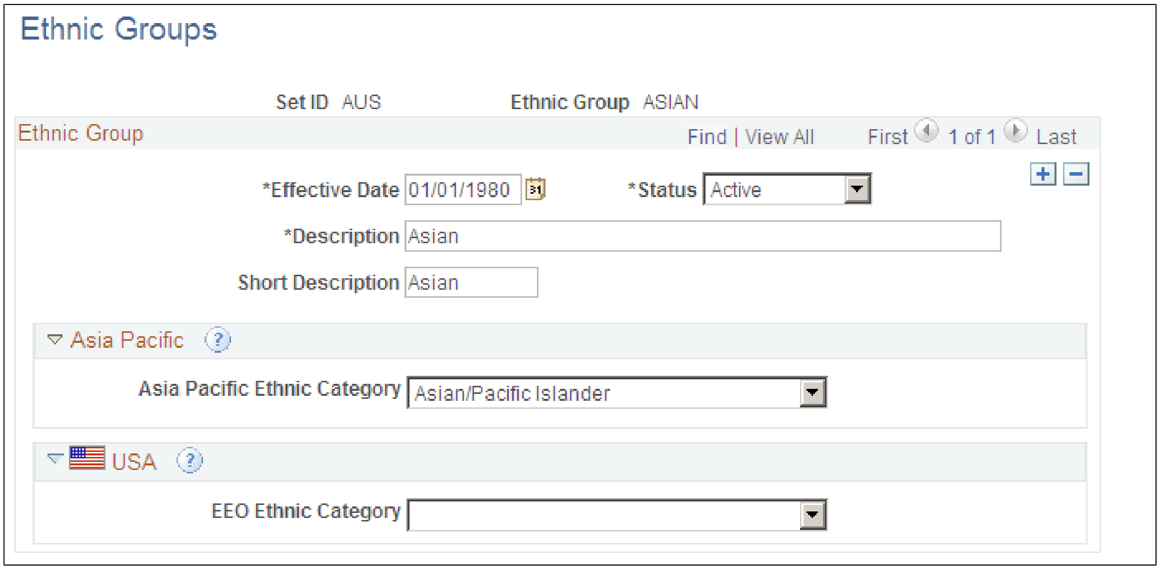
Use the Ethnic Groups page (ETHNIC_GROUP_TBL) to define ethnic groups.

Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Ethnic Groups** > **Ethnic Groups**

This example illustrates the fields and controls on the Ethnic Groups page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Asia Pacific Ethnic Category	Select a category if the ethnic group is for Australia, New Zealand, Malaysia, Hong Kong, or Singapore. Valid values are: • *Aboriginal Origin* • *Aboriginal/Torres Strait Islnd* • *American Indian/Alaskan Native* • *Asian/Pacific Islander* • *Black* • *Chinese* • *Eurasian* • *Hispanic* • *Indian* • *Irianese* • *Malay* • *Maori* • *Not Applicable* • *Pacific Islander* • *Torres Strait Islander Origin* • *White*

Field or Control	***Description***
EEO Ethnic Category	(USA) Select the category for this ethnic group. You may select one or more categories for each ethnic group. Values include: • *American Indian/Alaska Native* • *Asian* • *Black/African American* • *Hispanic/Latino* • *Native Hawaiian/Oth Pac Island* (other Pacific Island) • *Not Specified* • *White* **Note:** If the **Two-Question Format (Ethnicity)** check box is selected in the **USA Parameters** section of the “Country Specific Page” (Application Fundamentals), these categories (and not the individual ethnic groups that belong to these categories) are shown to USA self-service users who are entering their ethnic data.

Setting Up Security Clearance Types

To set up the security clearance types, use the Security Clearance Type (SEC_CLR_TYP_TBL) component.

This topic discusses how to define security clearance types.

Page Used to Set Up Security Clearance Types

Page Name	***Definition Name***	***Usage***
Security Clearance Type Page	SEC_CLR_TYP_TBL	Define security clearance types.

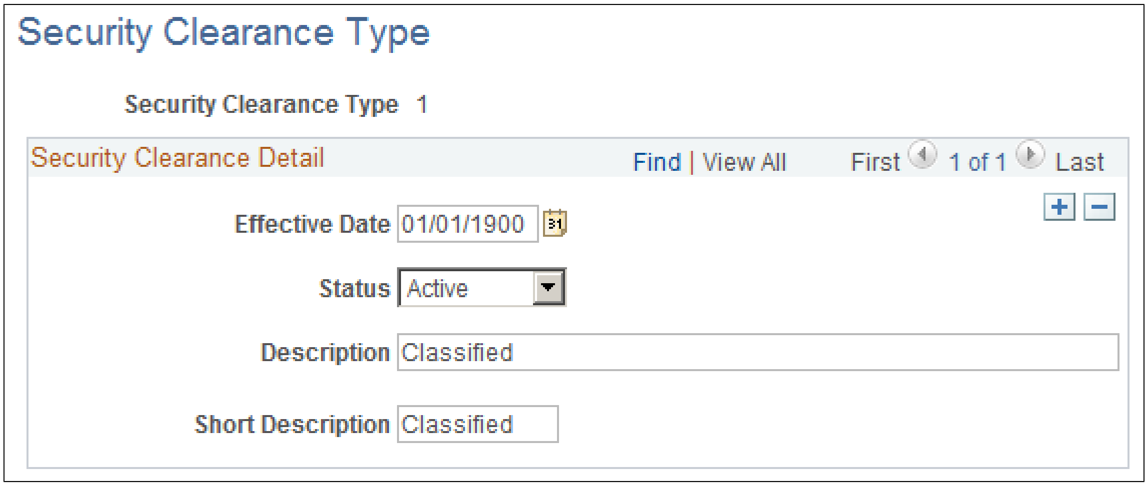
Security Clearance Type Page

Use the Security Clearance Type page (SEC_CLR_TYP_TBL) to define security clearance types.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Security Clearance Type** > **Security Clearance Type**

This example illustrates the fields and controls on the Security Clearance Type page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Effective Date	The date the security clearance type becomes effective.
Status	Provide the status of the security clearance. Valid values are *Active* or *Inactive.*
Description	Provide the long description of the security clearance type.
Short Description	Provide the short description of the security clearance type.

Creating Checklists

To set up the checklists tables, use the Checklist Items (CHKLST_ITEM_TBL), Checklist (CHECKLIST_TABLE), and Dynamic Link (DL_LINK_TBL) components.

These topics provide an overview of checklists and discuss how to set up standard checklists.

Pages Used to Create Checklists

Page Name	***Definition Name***	***Usage***
Checklist Dynamic Link Page	DL_LINK_TBL	Set up links to PeopleSoft pages so that the links can be associated with checklist items.
Checklist Items Page	CHKLST_ITEM_TABLE	Create items to include in checklists.

Page Name	***Definition Name***	***Usage***
Checklist Page	CHECKLIST_TABLE	Create checklists for the various types of processing you do in the Administer Workforce business process.

Understanding Checklists

PeopleSoft HR enables you to make checklists to help you remember all the details associated with adding workers or handling other PeopleSoft HCM tasks.

Use standard checklists as they are or use them as the basis for creating new checklists for particular workers. Make the items as general or specific as you want them to appear in checklists. For example, to gather health records, you could set up one code for all health data. Or, you might want to create separate items for all the elements of health records, such as physical exams, immunizations, and tests.

To make a checklist:

1. Define links to PeopleSoft pages that you may want to associate with a checklist item using the Dynamic Link page.
2. Create checklist items using the Checklist Items page.
3. Create a checklist by adding items to a checklist using the Checklist page.

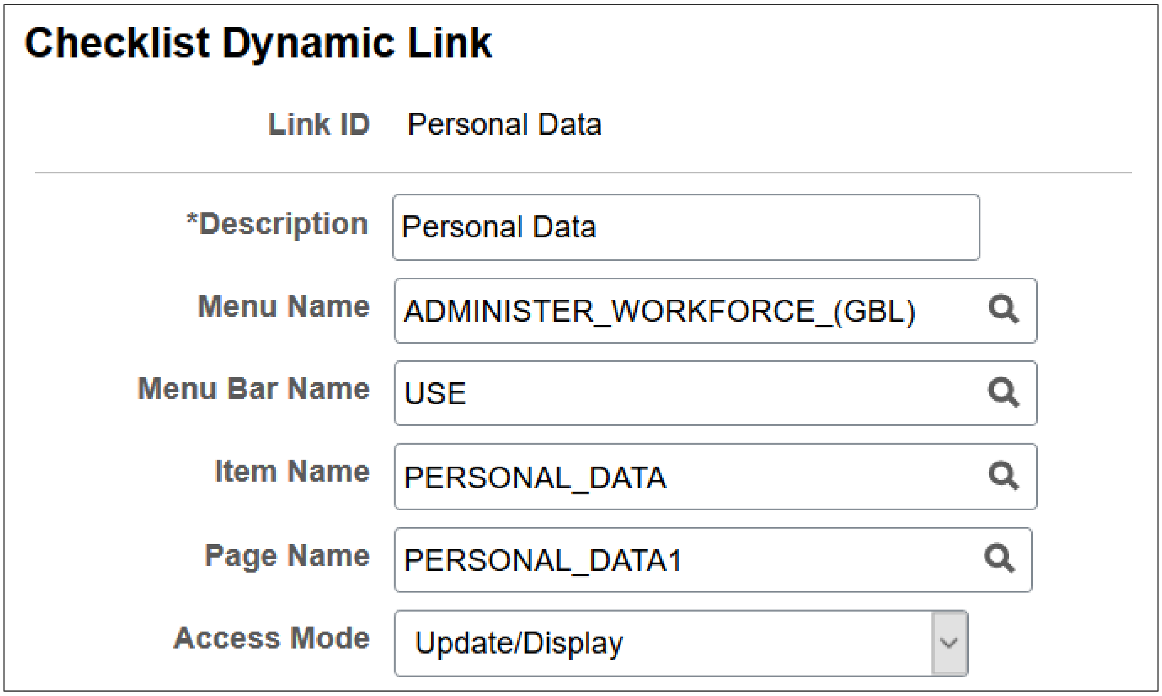
Checklist Dynamic Link Page

Use the Checklist Dynamic Link page (DL_LINK_TBL) to set up links to PeopleSoft pages so that the links can be associated with checklist items.

Navigation:

Set Up HCM > **Common Definitions** > **Checklists** > **Checklist Dynamic Link**

This example illustrates the Checklist Dynamic Link page.



Enter a description, and then use the remaining fields to identify the page that is the link target.

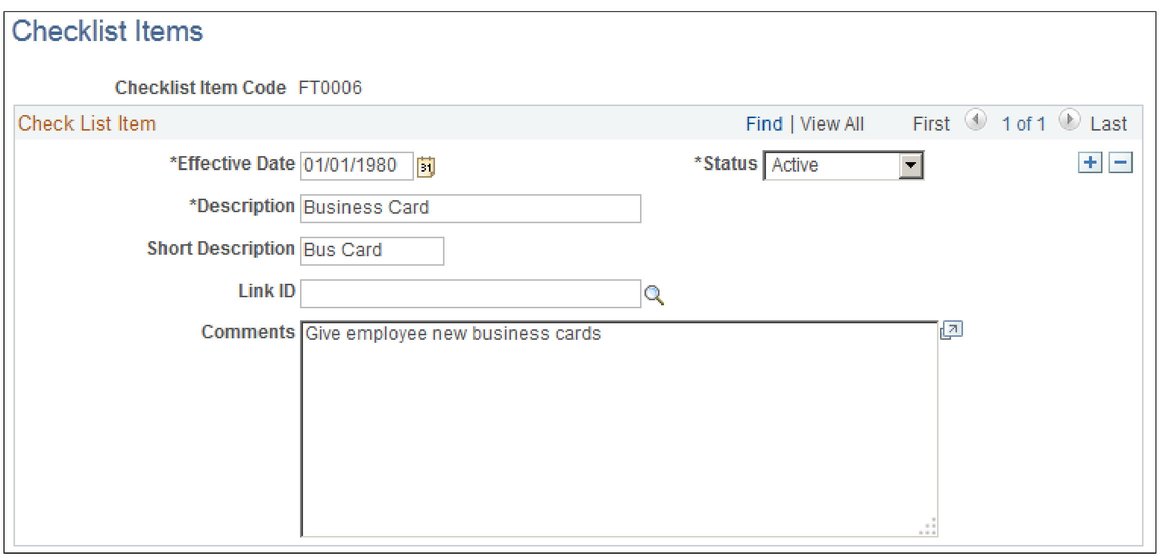
Checklist Items Page

Use the Checklist Items page (CHKLST_ITEM_TABLE) to create checklists for the various types of processing you do in the Administer Workforce business process.

Navigation:

Set Up HCM > **Common Definitions** > **Checklists** > **Checklist Items**

This example illustrates the Checklist Items page.



Field or Control	*Description*
Link ID	If the task is performed on a PeopleSoft page, select the dynamic link for the page where the task is performed.

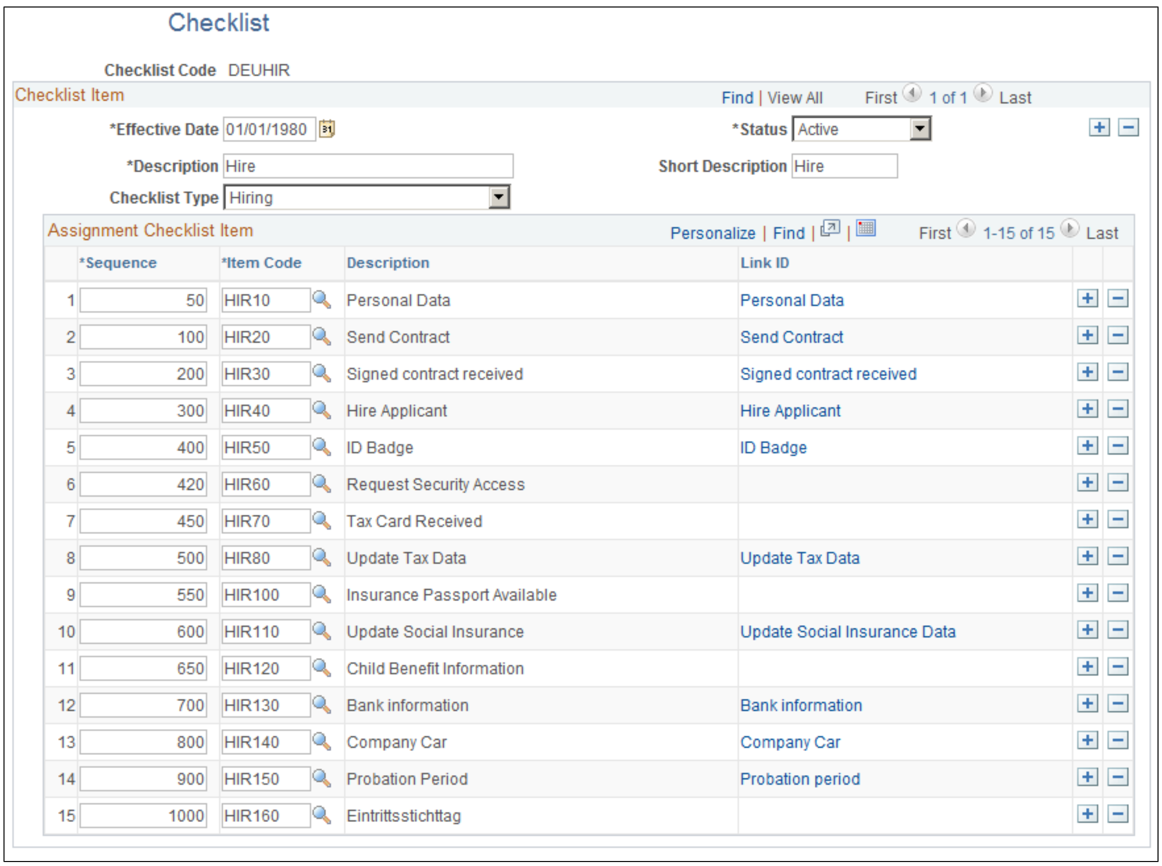
Checklist Page

Use the Checklist page (CHECKLIST_TABLE) to create checklists.

Navigation:

Set Up HCM > **Common Definitions** > **Checklists** > **Checklist**

This example illustrates the Checklist page.



	*Sequence	*Item Code	Description	Link ID
1	50	HIR10	Personal Data	Personal Data
2	100	HIR20	Send Contract	Send Contract
3	200	HIR30	Signed contract received	Signed contract received
4	300	HIR40	Hire Applicant	Hire Applicant
5	400	HIR50	ID Badge	ID Badge
6	420	HIR60	Request Security Access	
7	450	HIR70	Tax Card Received	
8	500	HIR80	Update Tax Data	Update Tax Data
9	550	HIR100	Insurance Passport Available	
10	600	HIR110	Update Social Insurance	Update Social Insurance Data
11	650	HIR120	Child Benefit Information	
12	700	HIR130	Bank information	Bank information
13	800	HIR140	Company Car	Company Car
14	900	HIR150	Probation Period	Probation period
15	1000	HIR160	Eintrittsstichttag	

Field or Control	*Description*
Checklist Type	Select the type of checklist that you want to create. Values include *Hiring, Medical, Organizational Instance, Other, Terminate, Training,* and *Transfer.*

Field or Control	***Description***
Sequence and **Item Code**	The system automatically sequences the item codes in multiples of 100. When you insert a data row for a new item, the system automatically assigns the next multiple of 100, such as 400. To rearrange the order in which the items appear, change the sequence numbers to the numerical order you want. For example, to reverse the order of *Outline Office hours/holidays (100)* and *Outline job responsibilities (200),* assign a lower number to *Outline job responsibilities* (such as *150)* and a higher number to *Outline Office hours/holidays* (such as *175).* When you save your changes, the system automatically displays the items in the new order.
Link ID	A link appears here if the checklist item is associated with a dynamic link to a PeopleSoft page where the task is performed.

Setting Up Workforce Contracts

To set up contracts for your workforce, use the Define Contract Types or Contract Types for Regulations (CONTRACT_TYPE_TBL), Contract Type Groups (CNTRCT_TYPE_GRP), Contract Clause Table (CNT_CLAUSE_TABLE), and Define Contract Templates (CNT_TEMPLATE_TABLE) components.

These topics discuss how to set up workforce contracts.

Related Links

“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)
“Setting Up Contract Pay” (PeopleSoft Payroll for North America)
“Entering Employee Contract Pay Settings” (PeopleSoft Payroll for North America)

Pages Used to Set Up Workforce Contracts

Page Name	***Definition Name***	***Usage***
Define Contract Types Page or Contract Types for Regulations Page	CONTRACT_TYPE_TBL	Define contract types.
Contract Type Groups Page	CNTRCT_TYPE_GRP	Group contract types together.
Contract Clause Table Page	CNT_CLAUSE_TABLE	Define special languages and riders that can be added to the main body of a workforce contract.

Page Name	*Definition Name*	*Usage*
Define Contract Templates Page	CNT_TEMPLATE_TABLE	Set up all of your organization's standard workforce contracts. Use the information that you define here when you assign contracts to employees and contingent workers in your organization.

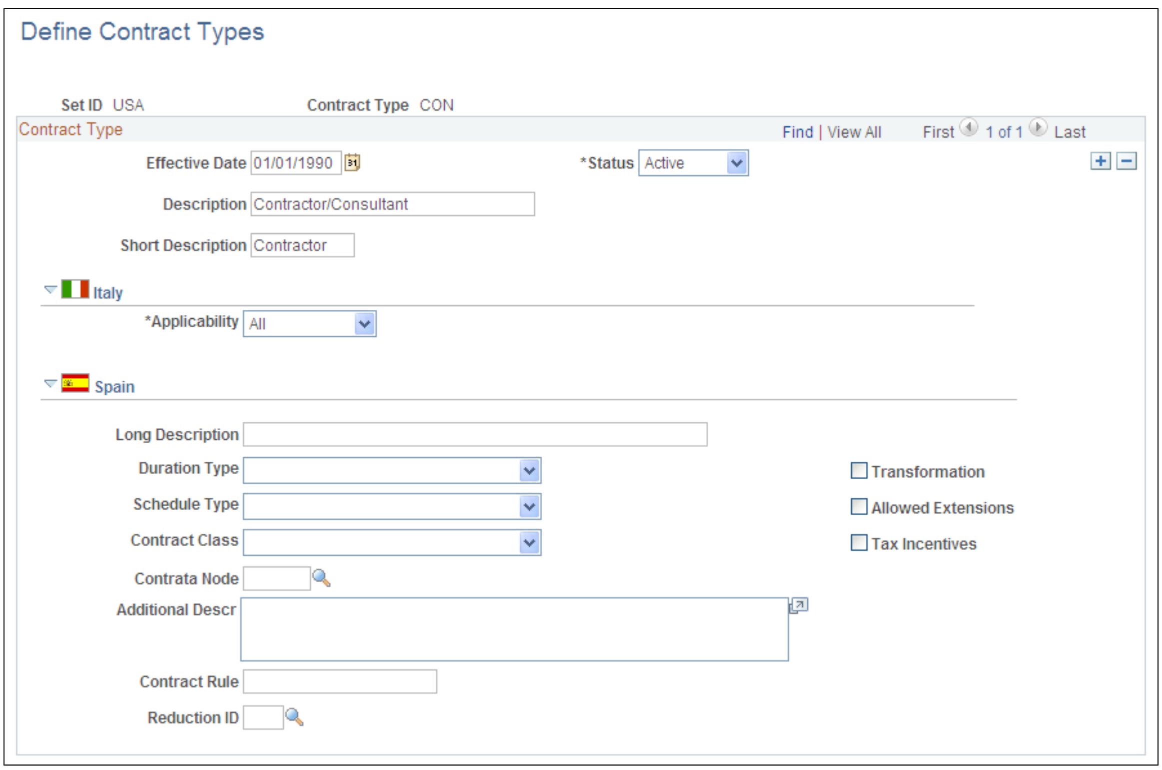
Define Contract Types Page or Contract Types for Regulations Page

Use the Define Contract Types or Contract Types for Regulations page (CONTRACT_TYPE_TBL) to define contract types.

Navigation:

- **Workforce Administration** > **Job Information** > **Contract Administration** > **Define Contract Types** > **Define Contract Types**
- **Set UP HCM** > **Product Related** > **Workforce Monitoring** > **Regulatory Requirements** > **Contract Types for Regulations** > **Contract Types for Regulations**

This example illustrates the fields and controls on the Define Contract Types page. You can find definitions for the fields and controls later on this page.



(ITA) Italy

Field or Control	***Description***
Applicability	Select whether this contract type is applicable to employees, contingent workers, or both.

(ESP) Spain

Field or Control	***Description***
Long Description	Enter a description for this type of contract.
Duration Type	Select the duration to be associated with this type of contract. The values available are: • *Fix Duration* • *Permanent* • *Temporary*
Schedule Type	Select the type of schedule followed by this type of contract. The values available are: • *Full Time* • *Part Time* • *Permanent Intermitent*

Field or Control	***Description***
Contract Class	Select the employee class to which this type of contract is applicable. The values available are: • *Disabled People* • *Employment Promotion* • *Insertion* • *Interinity* • *Partial Retirement* • *Production* • *Regular* • *Relieve* • *Service* • *Training*
Contrata Node	Select the XML starting node that you want to associate with this contract type.
Additional Descr	Enter any additional details you want to specify for this contract type.
Contract Rule	Enter the number of the law that governs this kind of contracts. A typical law number includes the type of law, law number, and year—for example, RD 3290/1997 or Ley 22/1995. The system doesn't edit your entry.
Reduction ID	This field is active only if PeopleSoft Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition or rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of social security contributions.
Transformation	Select this check box to permit transformation for this type of contracts. This check box is visible only if you have selected *Permanent* in the **Duration Type** field.

Field or Control	***Description***
Allowed Extension	Select this check box to permit extensions to be added to this type of contracts This check box will not be visible if you have selected *Permanent* in the **Duration Type** field.
Tax Incentives	Select this check box if tax incentives are applicable for this type of contracts.

Define Contract Templates Page

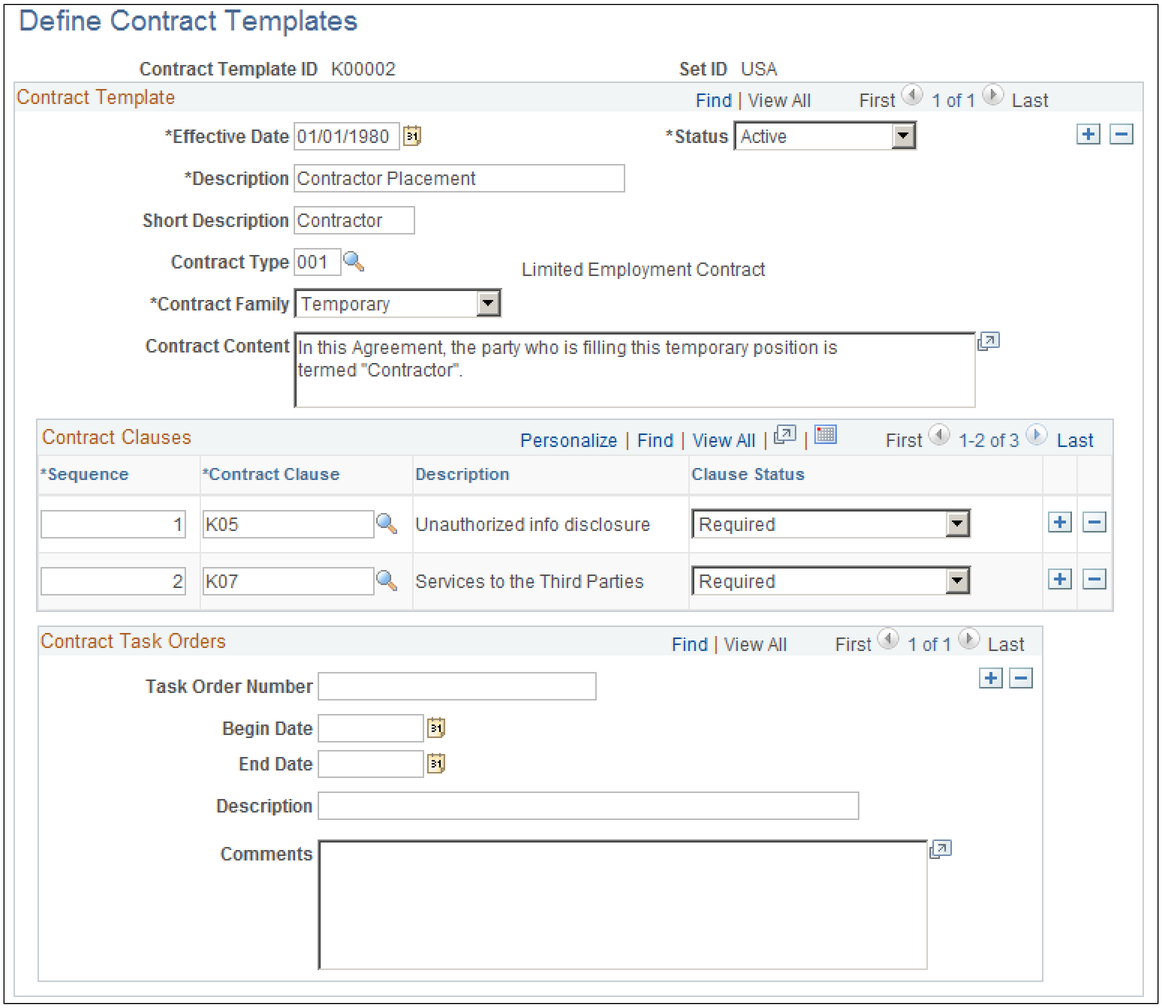
Use the Define Contract Templates page (CNT_TEMPLATE_TABLE) to set up all of your organization's standard workforce contracts.

Use the information that you define here when you assign contracts to employees and contingent workers in your organization.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Contract Administration** > **Define Contract Templates** > **Define Contract Templates**
- **Workforce Administration** > **Job Information** > **Contract Administration** > **Define Contract Templates** > **Define Contract Templates**

This example illustrates the fields and controls on the Define Contract Templates page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Contract Type	Select the contract type for this template from the contract types you have set up on the Contract Types for Regulations page.
Contract Family	Enables you to group a class of contracts. For example, you may have one contract family for regular employee contracts and another for contingent worker contracts. Tying contracts to a contract family helps you narrow your search criteria when you select a contract template.

Contract Clauses

Use this group box to define any special contract clauses that should be attached as riders to this contract template.

Field or Control	***Description***
Sequence	Enter the order in which to add the contract clauses to the contract.
Contract Clause	Select a contract clause from among those you've defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license.
Clause Status	Indicate if the clause is *Optional* or *Required.*

Chapter 3

Setting Up the Org Chart Viewer and Company Directory

Understanding Org Chart Viewer and Company Directory Features and Functionality

The Org Chart Viewer enables your employees and managers to search for people across the organization, to see a visual representation of the organization based on your defined hierarchical structures, and to enable self service actions from the visualization. Users can collaborate with co-workers by selecting the communication methods available within the organization including email, instant messaging (IM), telephone options, links to social networks, and a free form text field to add additional personalized information. A user can also access the Company Directory application on the go by using a tablet or smartphone.

This organizational visualization and navigation directory offers functionality beyond a typical organization chart by supporting worker collaboration, identifying direct-line and dotted-line reporting chains, and enabling users to initiate employee and manager self service transactions from the organizational view.

See Using the Org Chart Viewer.

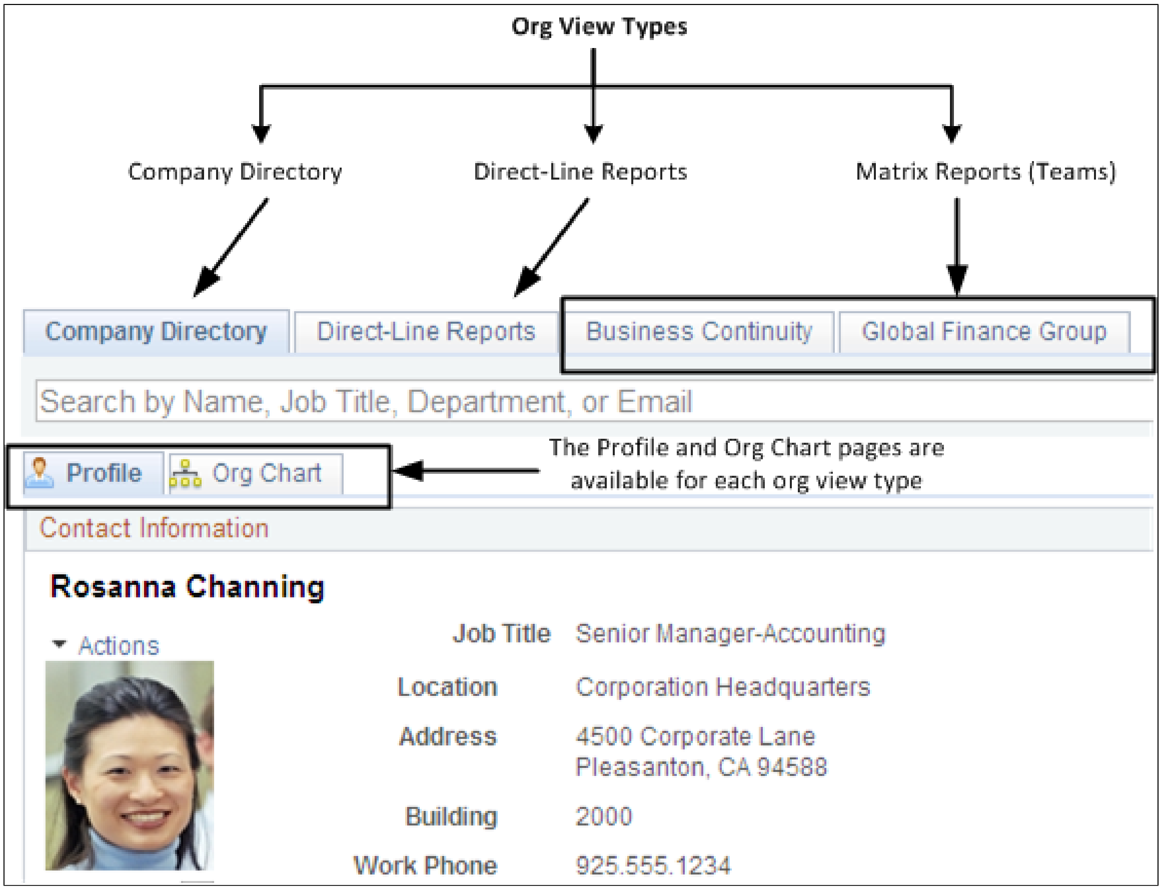
These topics provide an overview of the Org Chart Viewer component structure, the hierarchical reporting structures, related actions and self service transactions, permission lists and roles, Org Chart Viewer setup steps, and lists common terms and elements.

Note: The Org Chart Viewer feature in Classic has been replaced by the Company Directory functionality in Fluid. For more information, see Using the PeopleSoft Fluid User Interface for the Company Directory.

Understanding the The Org Chart Viewer Component Structure

The Org Chart Viewer component has three primary org view types, which display as folder tabs across the top of the component: Company Directory, Direct-Line Reports, and matrix report pages. Each of these top-level folder tabs are made up of two sub-pages (tabs) that correspond to the parent folder tab.

This example illustrates the tab organization of the Org Chart Viewer component. You can find definitions for the types of org view type tabs later on this page.



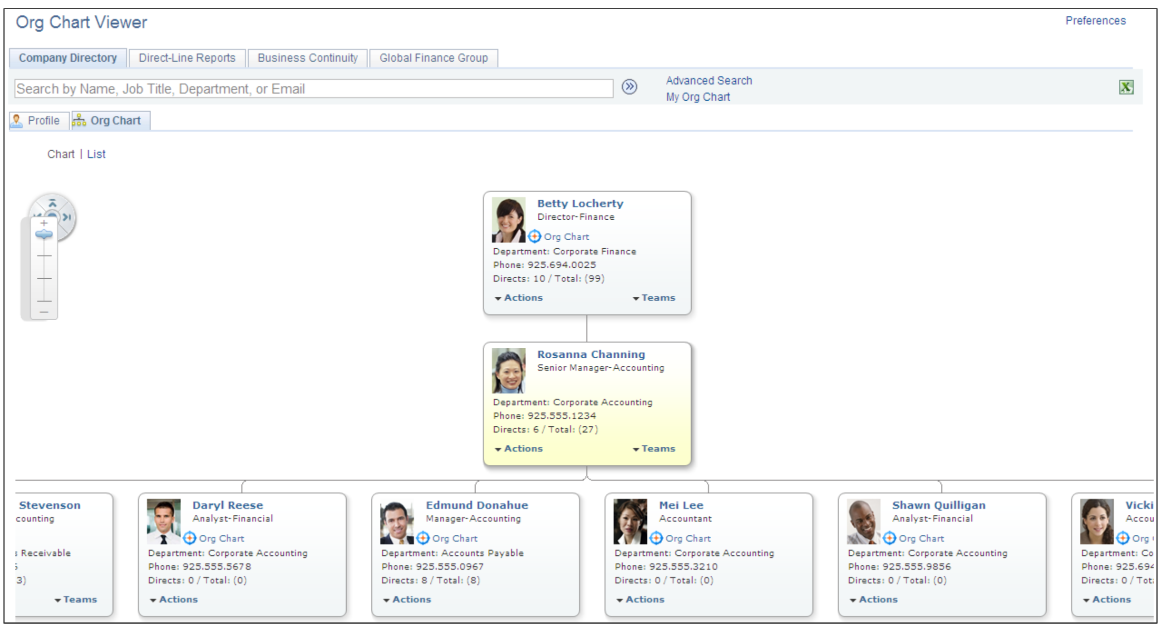
This table explains the different org view types:

Org View Type	***Usage***
Company Directory	Includes the organization's hierarchical structure. Use the Company Directory page of the Org Chart Viewer (first tab) to access this org view type information. This page is available to all employees and managers.
Direct-Line Reports	Includes employees that report up to the user. Use the Direct-Line Reports page of the Org Chart Viewer (typically the second tab, if available) to access this org view type information. This page displays content for managers with direct reports. This tab may not be available to a person without direct reports.

Org View Type	***Usage***
Matrix Reports <matrix team name>	Represents a reporting chain or hierarchy that is not a traditional direct-line reporting relationship and is sometimes referred to as dotted-line reporting or teams. Use the subsequent tabs that may display in the Org Chart Viewer component (typically the third and later tabs when all org view types are available) to access this org view type information. Each tab name reflects a matrix team name. A matrix team tab appears at the top of the Org Chart Viewer component for each matrix team with which a user is associated. If a user is not associated with any teams, matrix reports tabs will not display at the top of the Org Chart Viewer component.

Note: Access to the Org Chart Viewer component must be granted to users in order to access these pages. The roles are *Org Viewer User - Employee* and *Org Viewer User - Manager.*
For information on granting security access, see the product documentation for *PeopleTools: Security Administration*.

This example illustrates the Org Chart Viewer component where the user has access to all the different folder tabs.



Within each org view type folder tab of the Org Chart Viewer there are also two page tab views:

Pages within Each Org View Type	***Usage***
Org Chart	Displays a person within a three-tiered graphical representation of the reporting structure. The hierarchies rendered by the organization chart can be built manually, using access types, or trees. The chart focuses on a person and where he or she fits within the reporting structure.

Pages within Each Org View Type	*Usage*
Profile	Displays information about the focus person. The page shows up to five group boxes of information: two company related group boxes on the left side and three personalized group boxes on the right. The Profile page provides additional information about a person, such as his or her job details; links to other people with whom he or she is associated, such as direct reports, peers, and the manager; as well as personalized sections, which enable the employee to enter additional contact details, personal links, and free from text.

Understanding Hierarchical Reporting Structures

The Org Chart Viewer uses many methods for grouping individuals and creating hierarchical reporting structures. This table lists the ways the system enables you to create or view groups within the Org Chart Viewer pages:

Org View Type	*Grouping or Reporting Structure*
Company Directory	Tree-based hierarchy (COMPANY_DIRECTORY tree structure)
Direct-Line Reports	Access Type (using the Direct Reports API)

Matrix Reports (Teams)	• Manual (where the owner is at the top of the node)
	• Access Type (using the Direct Reports API)
	  • By Department Manager ID
	  • By Department Security Tree
	  • By Group ID
	  • By Part Posn Mgmt Dept Mgr ID
	  • By Part Posn Mgmt Supervisor
	  • By Reports To Position
	  • By Supervisor ID
	• Tree-based hierarchy (MATRIX_BY_JOB tree structure)

These topics discuss:

- Tree-based hierarchies.
- Non-tree-based hierarchies.

Tree-Based Hierarchies

Trees from Tree Manager provide the hierarchical structure for the Company Directory and for Matrix Teams configured using a tree. Search results, direct reports, and peers are derived from the Company Directory tree. You can manually create or modify a tree using the Tree Manager. Or, use the Job Tree Builder, a delivered PeopleSoft batch process that leverages the Direct Reports API, as an automated means of creating a tree of persons based upon their job data.

This will enable you to:

- Effective date each version of the hierarchy you want to expose via the Org Chart Viewer pages.
- Enforce a very strict hierarchy that is predetermined through your tree setup.
- Have improved performance at runtime and eliminate the necessity of fetching data from transactional tables (primarily PS_JOB) to derive the reporting relationships. With a Tree, the hierarchy will already exist in the database and not need to be derived at runtime from transactional data.

Note: The Company Directory use trees with the tree structure ID of *COMPANY_DIRECTORY* only. Matrix Teams use trees with the tree structure ID of *MATRIX_BY_JOB* only.

Note: The fluid version of the Company Directory leverages the same tree as the desktop version; both use the tree assigned to the Company Directory folder.

Non-Tree-Based Hierarchy

The Direct Reports UI/API determines the hierarchical structures of persons for the Direct-Line Reports org view type and for Matrix Teams defined by access type. The Direct Reports API also generates the SmartNavigation across the top of the page and the org chart.

Note: As of PeopleTools 8.55, the menu navigation structure is no longer available. Select **Company Directory** from the Nav Bar Navigator and it will take you to the Org Chart Viewer, if Fluid Company Directory is not implemented.

The Direct Reports API is a common HCM data service used for obtaining a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service is primarily leveraged for determining a manager’s security to specific employee jobs and as the data source for rendering org charts based on a selected employee (Job).

For better performance, the PeopleSoft application provides the Direct Reports Table Build, a framework for creating flattened views of reporting structures so that they can be accessed easily. Each access type has its own table that carries the data needed to search and maintain it. These tables are kept up to date using Event Manager as well as a nightly process to update future dated rows that are now current.

For more information, see the product documentation for *PeopleTools: Tree Manager*, *PeopleTools: Portal Technology*, and *PeopleTools: Applications User's Guide*.

Related Links

“Configuring Direct Reports Functionality” (Application Fundamentals)

“Setting Up Access to Direct Reports Data” (Application Fundamentals)

Understanding Related Actions and Self Service Transactions

When an individual views his or her content, whether from the Org Chart tab or the Profile tab within the Org Chart Viewer pages, he or she can be granted the ability to access HCM related self service transactions using the Actions menu drop-down list. The manager can also be granted the ability to access HCM related manager self service transactions using the Actions menu link for his or her subordinates.

PeopleSoft delivers a number of related actions for Manager Self Service as well as Employee Self Service for different modules. All or a subset of these related actions are being initiated from Org Chart Viewer, Manager Dashboard, Talent Summary and Application Search.

See *PeopleTools: PeopleTools Portal Technologies,* “Developing and Configuring Related Content Services”.

This table lists the delivered actions for the Org Chart Viewer for the employees and managers:

Self Service Menu	***Employee Self Service Actions***	***Manager Self Service Actions***
Time Reporting or Time Management	Time Reporting • Request Absence • View Absence Balances • View Absence History • Request Extended Absence • View Extended Absence History • Donate Leave • Receive Donated Leave • Return Unused Leave • Terminate Participation in Program • View Leave Transfer Request History • Timesheet • Overtime Request • Mass Time • View Monthly Schedule • Payable Time Summary • View Exceptions • View Payable Time Detail • View Compensatory Time • View Time and Labor Launch Pad • Time and Labor User Preferences	Time Management • Request Absence • View Absence Balances • View Absence History
Job and Personal Information	• View Personal Info Summary • Update Home/Mailing Address • Update Emergency Contacts • Update Marital Status • Change Name • Review Ethnicity Details	• View Employee Personal Info • Request Reporting Change • Transfer Employee • Promote Employee • Request Location Change • Change Full/Part Time Status • Retire Employee • Terminate Employee

Self Service Menu	***Employee Self Service Actions***	***Manager Self Service Actions***
Compensation and Stock	• View My Total Rewards • View Compensation History • View Stock Option Summary	• Request Ad Hoc Salary Change • View Total Rewards • View Compensation History • View Employee Stock Option Summary
Payroll	• View Paycheck • Maintain Direct Deposit • Change W-4 Tax Information • Maintain Voluntary Deductions • Indicate W-2/W-2c Consent • Indicate T4/T4A Consent • View W-2/W-2c Forms • View T4/T4A Slips • Request W-2 Reissue • View Payslip • View Payslip UK • Maintain Personal Bank Accounts • Maintain Net Pay Distribution • Update Year End Adjustment Data Japan	N/A
Benefits	• View Benefits Summary • View Dependent and Beneficiary Info	N/A
Development	• View My Current Profile • View My Historical Profile • View My Job Profiles • View My Interest List	• View Current Team Profiles • View Team Historical Profiles • View Team Interest Lists

Self Service Menu	Employee Self Service Actions	Manager Self Service Actions
Performance Management	• Create My Performance Document • Create My Development Document • My Current Performance Documents • My Current Development Documents	• Create Performance Document • Create Development Document • Open Performance Documents • Open Development Documents
Career Planning	View My Career Progression Chart	• Manage Career Plans • View Career Progression Chart
Succession Planning	N/A	• Manage Succession Plans • View Succession 360

Note: When security access is granted, managers can also select other list items when viewing actions for a direct or indirect report. Managers with access can also use the Manager Dashboard link at the top of the Direct-Line Reports org view type page to view a set of management related pagelets that enables managers to quickly and easily view and update human resource information as needed from one page.

Manager can also use the **Actions** menu links to navigate to other pages for an employee using these action, such as:

- **View in Talent Summary** or **View Employee Snapshot**
- **Manager Dashboard**
- **OnBoarding Status**

Understanding Org Chart Viewer Permission Lists and Roles

The PeopleSoft HCM application delivers these permission lists in order to grant access to the Org Chart Viewer tab pages:

Permission List	Usage
HCCPSS2215 - Org Viewer Company Directory	Provides the user access to Company Directory tab and pages within the Org Chart Viewer.

Permission List	Usage
HCCPSS2220 - Org Viewer Direct-Line	Provides the user access to the Direct-Line Reports tab and pages within the Org Chart Viewer. **Note:** It is possible for a user to have security access and still not see the Direct-Line Reports tab. For example, this might occur when the user does not have direct-line reports for the access type as defined in Configure Direct Report UI for the component named HRCD_CO_DIRECTORY.
HCCPSS2225 - Org Viewer Dotted-Line	Provides the user access to Matrix tabs and pages within the Org Chart Viewer. **Note:** It is possible for a user to have security access and still not see a particular matrix tab folder. For example, the user may not be a member or owner of the matrix, the matrix definition may be inactive, or the matrix may not be available for viewing.

The following content references are associated in the **Related Content Framework** > **Manage Related Content Services** component for the Org Chart Viewer:

- *PeopleTools 8.51:* HC_HRCD_TREE_DTL_GBL (Company Directory Tree Detail)
- *PeopleTools 8.52 or higher:* the related content is associated via the CREF HC_HRCD_CO_DIRECTORY_GBL (Company Directory).

Common Terms and Elements Used When Working with the Org Chart Viewer

Field or Control	Description
access type	Defines the reporting relationship used in the Org Chart Viewer for a user and is configured in the Direct Reports API. The Direct Reports API is a common HCM data service that obtains a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service determines a manager's row-level security to individual employees and validates that the user has security access to the employee. See "Configuring Direct Reports Functionality" (Application Fundamentals). See "Setting Up Access to Direct Reports Data" (Application Fundamentals).
org view type	Denotes the type of organizational view the system will present to the user when in the Org Chart Viewer. These views are company directory, direct-line reports, and matrix teams.

Field or Control	***Description***
IM (Instant Messaging)	A form of real-time direct text-based communication between people using shared clients.
matrix reports or matrix team	A reporting chain or hierarchy that is not a traditional direct-line reporting relationship. Sometimes referred to as dotted-line reporting relationships.
matrix owner	The person responsible for a matrix team. This may be the person in the top node of a team org chart or it may be a person that needs to administer the team.
matrix managers or leads	Employees that have dotted-line reports. These are defined when creating matrix teams.

Setting Up the Org Chart Viewer and Company Directory

To set up the Org Chart Viewer and Company Directory tables, use the Job Tree Builder (HR_TREEBLD_RNCTL), Structure and Content (PORTAL_FLDR_ADM), Chart and Profile Field Map (HRCD_SETUP_FLD_MAP), Additional Contact Types (HRCD_ADDTL_CNTCT), and Chart and Profile Settings (HRCD_SETUP) components.

These topics provide an overview of Org Chart Viewer and Company Directory setup steps and discuss how to set up the Org Chart Viewer and Company Directory.

Pages Used to Set Up the Org Chart Viewer and Company Directory

Page Name	***Definition Name***	***Usage***
Tree Builder Run Control Page	HR_TREEBLD_RNCTL	Run the Job Tree Builder process to create or rebuild an entire tree, update a portion of a tree starting from a specific node, or update the tree's source data table without making any alterations to an existing tree.
Folder Administration Page	PORTAL_FLDR_ADM	Update the portal folder definition for the Company Directory.
Chart and Profile Field Map Page	HRCD_SETUP_FLD_MAP	Define the org chart and profile field page mappings. Maintain or add additional fields that should be available on the Org Chart and Profile pages of the Org Chart Viewer.

Page Name	***Definition Name***	***Usage***
Org View Mapping Page	HRCD_FLDMAP_SEC	Select the org view types that can use this field.
Additional Contact Types Page	HRCD_ADDTL_CNTCT	Define additional contact types that will be available to the user on the Profile, Edit Additional Contacts page of the Company Directory.
Chart and Profile Settings - General Settings Page	HRCD_SETUP_GENERAL	Define default startup page content and layout settings for each org view type.
Chart and Profile Settings - Profile Content Page	HRCD_SETUP_PROFILE	Select the contact information, HR details, and employee personalization field options that should appear on the Profile page for each org view type.
Org Chart Content Page	HRCD_SETUP_OC_NODE	Select the organization chart field options that should appear on the Org Chart page for each org view type.

Understanding the Org Chart Viewer and Company Directory Setup Steps

In order to use the Org Chart Viewer functionality, you need to perform these tasks:

1. Run the Direct Reports Table Build process using the "Direct Reports Tables Build Page" (Application Fundamentals) to update the direct reports for managers with current information.
2. Build a job tree.

   The system administrator will need to build trees, either manually or through the Job Build Tree Run Control page, using the proper tree structure. This will support the organizational charts that show the hierarchies of people according to their job information.

   Note: If you build a tree manually, you still need to run the Job Tree Builder with a **Build Action** of *Update Process Tables Only.*

   See Understanding the Org Chart Viewer and Company Directory Setup Steps.

   See Tree Builder Run Control Page.
3. Update the Company Directory (HC_COMPANY_DIRECTORY) folder definition to ensure the tree name is equal to the tree created in step 1. This information is used for the Org Chart Viewer, Company Directory folder.

   Note: This step needs to be performed any time the tree name is changed.

   See Folder Administration Page.

   See PeopleSoft HCM Portal Pack.

4. Set up the Org Chart Viewer pages.

   The system administrator will need to set up the rules for the organizational chart and profiles, both of which are presented in all of the Org Chart Viewer pages.

   a. (Optional, since many fields are delivered) Map fields for the org chart and profile pages.

      See Chart and Profile Field Map Page.

   b. (Optional, since many contact types are delivered) Define additional contact types.

      See Additional Contact Types Page.

   c. Set up the org chart and profile settings for each org view type—*Company Directory,* **Company Directory Fluid***Direct-Line Reports,* and *Matrix Reports.*

      See Chart and Profile Settings Page.

5. Establish the hierarchy for the Direct-Line Reports tab by configuring the **Access Type** value for the HRCD_CO_DIRECTORY component. Do this by navigating to **Set Up HCM** > **Common Definitions** > **Direct Reports for Managers** > **Direct Reports Interface**

6. Create matrix teams.

   See Matrix Team Page.

7. Create dotted line reports.

   See Dotted Line Page.

The combined setup pages enable you to configure the hierarchies and information you want to display on each of the pages.

Understanding the Steps to Building a Job Tree

This topic lists the steps to build a Job tree.

1. Analyze Your Organization.

   a. Determine the population.

      The first step to building a job tree is to determine the population of employees who should be included in the tree. For example, do you want to include the entire company, or only a particular division? This is key to determining which person (job) should be the root, or top node, of your job tree.

   b. Determine reporting relationships.

      Next, you will need to understand the reporting structure, or hierarchy, of your organization. In other words, how do the jobs in the organization relate to each other? How are the reporting relationships defined? For example, your organization may use the reports to position in Position Management as your reporting structure, or maybe you enter the supervisor's ID directly into the person's Job Data record.

   c. Determine the appropriate effective date.

Finally, determine the point in time you want to capture these job relationships. Should the hierarchy always be based on current information? Do you need to capture future relationships? Should the tree represent past job relationships?

2. Build the Tree.

   Once you have a good understanding of the organization you want to represent in your job tree, it is time to build the tree. The approach you take for building the tree depends upon how closely the reporting structure of your organization matches one of these **Build Method** types:

   - *By Department Manager ID*

   - *By Department Security Tree*

   - *By Partial Position Management and Department Manager ID*

   - *By Partial Position Management and Supervisor ID*

   - *By Report To Position (Number)*

   - *By Supervisor ID*

   If your organization's reporting structure exactly matches one of the types listed above, then you can use the Job Tree Builder to build your tree automatically.

   If your organization's reporting structure mostly matches one of the types previously listed, then you can use the Job Tree Builder to build your initial version of the tree, then manually update the tree (by adding, moving, or deleting nodes) using Tree Manager. The Job Tree Builder also supports partial updates to existing trees using the build action *Update Existing Tree-From Node.* This allows a selected section of the tree to be created using a different **Build Method** value.

   If your organization's reporting structure does not closely match one of the build methods, then you will build a job tree using the following two steps.

   a. Populate the Source Tree Data

      First you will need to populate a table with all current and future active Jobs as of the system date. As part of this step, the Job data is assigned a new key value that is compatible with Tree Manager. This step is performed by the Job Tree Builder using any of the **Build Action** values. If you only want to perform this step, select the **Build Action** option *Update Process Tables Only.*

   b. Build the Tree and Tree Nodes

      This step uses the data created in the previous step to build the tree. Depending on how closely your organization's reporting structure matches one of the delivered build methods determines if the Job Tree Builder is used for this step, or if this is a manual task in Tree Manager.

   See Tree Builder Run Control Page.

3. Review the Tree in Tree Manager.

   After you have created any tree, you should review it using Tree Manager to ensure that the tree appropriately represents the organization's reporting structure. You can make changes directly to the tree in Tree Manager, if desired, or use the Job Tree Builder to refresh the tree or portions of the tree.

Remember that trees in Tree Manager are effective dated and can also be saved as draft trees or made inactive.

See *PeopleTools: PeopleSoft Tree Manager*

4. Determine Update Frequency.

   Trees in PeopleSoft are effective-dated and static. Your job tree will represent a reporting hierarchy as of a given point in time. Changes to employee job data will not automatically be reflected in a job tree. This means that your organization will need to determine how often and by which means the tree will be updated. For example, will your organization update the tree nightly by a scheduled run of the Job Tree Builder? Are manual updates required? Since the Job Tree Builder is a standard run control page, it can be used to schedule your tree refreshes or partial updates according to a defined frequency. If your tree contains a large number of manual updates, you will need to consider your plan for tree refreshes carefully.

   Regardless of how often or by which means your job tree is updated, PeopleSoft recommends that your organization use a regularly scheduled process that performs the build action process of *Update Process Tables Only.* This will ensure that all newly active jobs (new hires, for example) are available in the tree's source data table.

For more information, see the product documentation for *PeopleTools: PeopleTools Portal Technologies,*, "Working With Navigation Pages".

Understanding the PeopleSoft Fluid User Interface for the Company Directory

The Fluid Company Directory uses much of the same setup as you would to support the company directory on a workstation or mobile devise (see Understanding the Org Chart Viewer and Company Directory Setup Steps). Remember these important steps when working with the Fluid Company Directory feature:

1. Run the Direct Reports Table Build process (Set Up HCM, Common Definitions, Direct Reports for managers, Direct Reports Table Build).

2. Build your trees using the Tree Builder component (Set Up HCM, Common Definitions, Org Chart Viewer, Tree Builder)

3. Build the *HC_HR_COMPANY_DIRECTORY1* search index (PeopleTools, Search Framework, Administration, Deploy/Delete Object and PeopleTools, Search Framework, Administration, Schedule Search Index).

   Search definitions are business objects that are made available for text search. Each search definition is associated with a query to capture the business context data needed for the search. The search definition provides the information required by the search framework to enable the system to create search results (search documents). For more information, see “Understanding PeopleSoft Search Framework Implementation for HCM” (Application Fundamentals).

Related Links

Tree Builder Run Control Page

“Configuring Direct Reports Functionality” (Application Fundamentals)

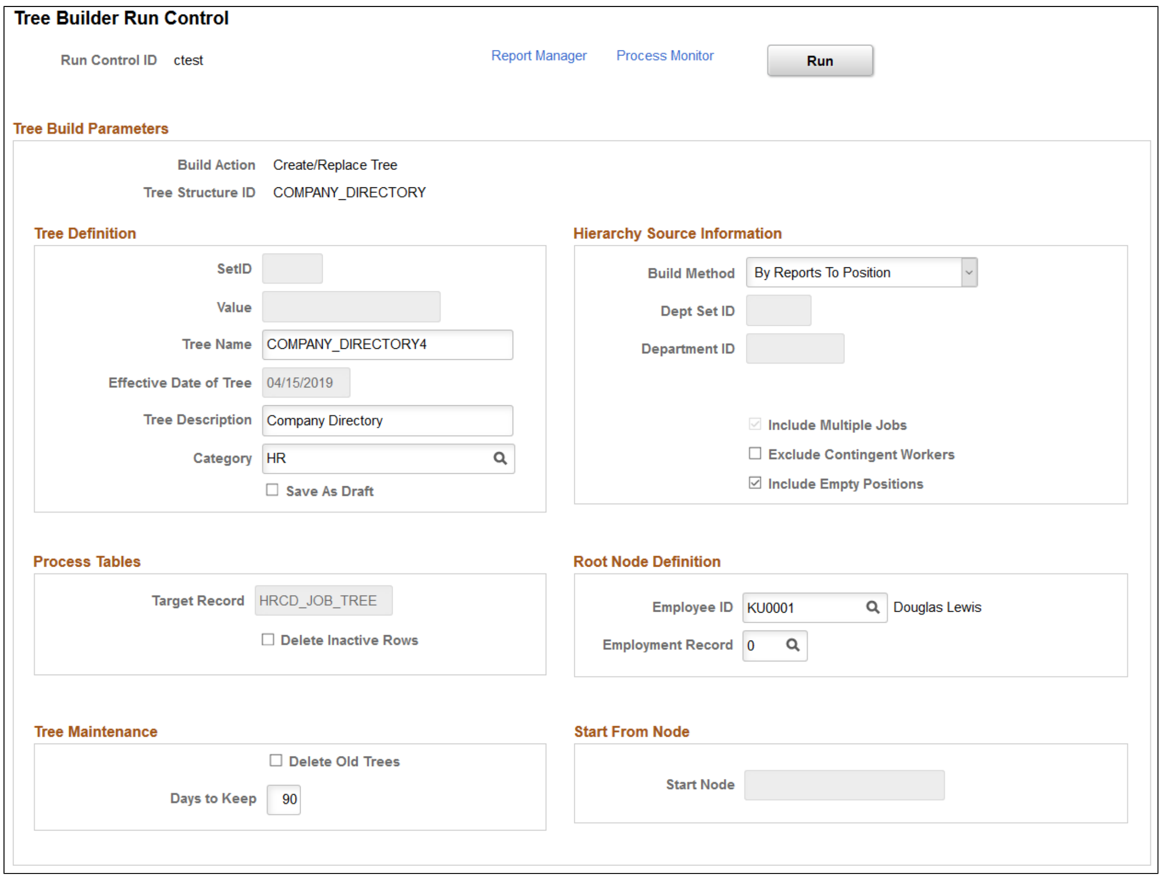
Tree Builder Run Control Page

Use the Tree Builder Run Control page (HR_TREEBLD_RNCTL) to run the Job Tree Builder process to create or rebuild an entire tree, update a portion of a tree starting from a specific node, or update the tree's source data table without making any alterations to an existing tree.

Navigation:

- **Set Up HCM** > **Common Definitions** > **Org Chart Viewer** > **Tree Builder Run Control**
- **Set Up HCM** > **System Administration** > **Utilities** > **Job Tree Builder** > **Tree Builder Run Control**

This example illustrates the fields and controls on the Tree Builder Run Control page. You can find definitions for the fields and controls later on this page.



Use the Job Tree Builder (HR_TREEBLD_RNCTL) component to create trees. You can use trees to define your reporting structures for the Company Directory and Matrix Teams configured to use a tree.

The Job Tree Builder Run Control page executes the HR_TREEBLD Application Engine process. This process creates trees of jobs using the selected **Build Method** option.

Warning! Certain characters are inappropriate for use in a URL and should not be used in the names of trees that you use.
For a list of these characters, see *PeopleTools: PeopleSoft Tree Manager,* "Creating Trees," Understanding Steps to Create Trees, Characters Not Used in Tree Name, SetID, Set Control Value, and Tree Branch

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See Understanding the Org Chart Viewer and Company Directory Setup Steps.

Field or Control	***Description***
Build Action	Indicate whether you want to create or rebuild an entire tree, update a portion of a tree starting from a specific node or location on a tree, or update the trees source data table without making any alterations to an existing tree. Valid values are: • *Create/Replace Tree* Creates a new tree or, if a tree exists for the Tree Definition parameters entered on this page, deletes and recreates the tree. • *Update Existing Tree-From Node* Updates an existing tree from a tree node identified in the **Start Node** field. The start node cannot be a root node from an existing tree. All nodes under the selected tree node will be refreshed according to the hierarchy **Build Method** selected. • *Update Process Tables Only* No tree processing occurs. The target table is updated, enabling you to manually add new Jobs added by the process to the tree using Tree Manager.

The following table represents the fields within each group box that are available, depending on the **Build Action** value that is selected:

Group Box	***Create/Replace Tree***	***Update Existing Tree-Form Node***	***Update Process Tables Only***
Tree Definition	• **Tree Name** • **Tree EffDt** • **Tree Description** • **Category** • **Save As Draft**	• **Tree Name** • **Tree EffDt** • **Save As Draft**	N/A
Hierarchy Source Information	**Build Method**	**Build Method**	N/A
Root Node Definition	• **Employee ID** • **Empl Record**	N/A	N/A
Start From Node	N/A	**Start Node**	N/A

Note: N/A indicates that a field availability is not applicable for this method and group box.

Field or Control	*Description*
Tree Structure ID	Select a tree structure ID. The value selected in **Tree Structure ID** field determines the fields that are required to uniquely identify a tree and it tells the process which type of tree it should build when the process is run. For example, Matrix Teams use the *MATRIX_BY_JOB* tree structure ID and Company Directory trees use the *COMPANY_DIRECTORY* tree structure ID. **Note:** If you are building a job tree for the Company Directory or Matrix Teams, you must enter the corresponding **Tree Structure ID** values. The system uses the HR_JOBTREE_META table to retrieve meta-data from the tree structure ID to auto-populate the following fields on this page: **Set ID, Tree Name, Tree EffDt, Tree Description, Category, Target Record,** and **Exception Table.** The tree structure ID also determines the fields that are required in the **Tree Definition** group box.

Tree Definition

Many of the fields in this group box are available when the **Build Action** values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Field or Control	*Description*
SetID and **Value**	Enter the set ID and set control value of the tree, if applicable. Availability of this field depends on the configuration of the tree structure ID. For example, these fields are not available when using the *COMPANY_DIRECTORY* or *MATRIX_BY_JOB* tree structures required by the Org Chart Viewer, Company Directory or Matrix Teams features.
Tree Name	Enter the name of the tree. This field is available when the *Create/Replace Tree* and *Update Existing Tree-From Node* **Build Action** values are selected. **Note:** For the Company Directory to work properly, you need to update the portal definition to use the same tree name you have identified here.

Field or Control	***Description***
Effective Date of Tree	Enter an effective date for the tree. If a date is not provided, the process will use the system date when creating the tree. This enables you to leave this field blank and set up the run control as a recurring process. This field is required for the *Update Existing Tree-From Node* build action. When updating an existing tree, you must point the process to a unique tree, so an effective date is required. When you select the *Update Existing Tree-From Node* build action option, this field provides by default the current tree for the **SetID, Set Control Value,** and **Tree Name** field values you entered on this page. **SetID** and **Set Control Value** field values may not be required for all tree structure IDs. This field is available when the **Build Action** values *Create/ Replace Tree* and *Update Existing Tree-From Node* are selected.
Tree Description	Enter the description of this tree. This field is available when the **Build Action** value *Create/ Replace Tree* is selected.
Category	Enter the tree category for a tree. This field is available when the **Build Action** value *Create/ Replace Tree* is selected.
Save As Draft	Select this check box when you want to save the tree in draft mode. To change the status of the tree, run the process again with the **Save As Draft** check box deselected or save the draft as a valid tree through Tree Manager. This field is available when the **Build Action** values *Create/ Replace Tree* and *Update Existing Tree-From Node* are selected.

Hierarchy Source Information

Use this group box to specify how the system should define the hierarchical structure of the tree. The fields in this group box are available when the **Build Action** values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Field or Control	***Description***
Build Method	Select the method the process will use for deriving reporting relationships based on Job Data. This field is available when the **Build Action** values *Create/ Replace Tree* and *Update Existing Tree-From Node* are selected. Valid **Build Method** options are: • *By Department Manager ID* • *By Part Posn Mgmt Dept Mgr ID* • *By Part Posn Mgmt Supervisor* • *By Report To Position (Number)* • *By Supervisor ID* For the first five build methods listed here, the Job Tree Builder process uses the existing Direct Reports API data service to determine the reporting structure for building the job tree. This data service is capable of navigating an organization structure and returning a list of workers that report to a particular manager. Also, for these build methods, the process uses Employee ID/Empl Record entered on the Tree Builder Run Control page to set the root node of the job tree. The process then determines the jobs reporting to the root node by making a request to the Direct Reports API data service using the **Build Method, Employee ID/Empl Record,** and **Tree EffDt** entered on the run control page. Nodes are created for all jobs returned by the data service. This process is repeated down the reporting chain for every job in the hierarchy. See “Understanding Direct Reports Functionality” (Application Fundamentals). • *By Dept Security Tree* The method is available only with the build action *Create/ Replace Tree.* This build method does not use the Direct Reports API to determine a reporting structure. Instead, this build method uses the department security tree and the manager information for the departments to determine the reporting structure.

Field or Control	Description
	To build the job tree, the process traverses the specified department security tree starting from the department node specified. For each department node in the department security tree, the process determines the node's manager, and then creates a tree node for each of the department managers. For each manager node, the process creates nodes for the department members reporting to the appropriate department manager. If an employee reports to a department that is not assigned to an active manager, then the process assigns that employee to the next manager up the tree. Departments can have the following manager types: Manager ID, Manager Position, or not be assigned to a manager. If Position Management is being used, a department may be assigned to a Manager Position that could be associated to multiple active incumbents. See “Maintaining Departments” (Application Fundamentals). **Note:** When creating trees using *By Dept Security Tree,* it is recommended that you audit the source Dept Security tree and run the Repair Tree utility on the source Dept Security Tree to correct any invalid level numbers. For this build method, the Job Tree Builder assumes the level numbers for the nodes to be correct. See *PeopleTools: PeopleSoft Tree Manager,* "Auditing and Repairing Trees" for more information on the Repair Tree utility.
Dept Set ID (department set ID) and **Department ID**	Enter the department set ID and department code when you select the **Build Method** option *By Dept Security Tree.* The batch process will start from this department in the Dept Security tree and work downwards from that node. When you enter or change the **Dept Set ID** value, the **Department ID** field provides the root node of the Dept Security tree as a default value and the **Root Node Definition** fields default the employee ID associated with the department of the root node. If the department is assigned to a manager position, the Employee ID field will provide by defaulted the lowest employee ID of the active incumbents of that position.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Include Multiple Jobs</td><td>Indicates if the tree is to include nodes for both primary and non-primary jobs. If this field is not selected, only nodes for active primary jobs will be included in the tree.

For the tree structure ID COMPANY_DIRECTORY, this value comes from the Chart and Profile Settings - General Settings page and the check box is not available on this page.

Note: For the tree structure ID COMPANY_DIRECTORY, if you have selected the Display Multiple Jobs check box on the Chart and Profile Settings - General Settings page, the system will allow additional jobs in the search only when these jobs are present in the tree. Therefore, if you change the Display Multiple Jobs setting on the Chart and Profile Settings - General Settings page, you should run the Job Tree Builder process to ensure that all jobs are captured on the tree.</td></tr>
<tr><td>Exclude Contingent Workers</td><td>Select to exclude contingent workers who do not have direct reports.

Note: To maintain the integrity of the hierarchy, contingent workers with active direct reports are always included in the tree, whether or not this check box is selected.</td></tr>
<tr><td>Include Empty Positions</td><td>Select to include empty positions within your Company Directory tree. When you build your tree with this check box selected, empty positions will display within the fluid Company Directory pages.

This option is available when your organization uses partial or full Position Management and you select a Build Method that is position-based (By Part Posn Mgmt Dept Mgr ID, By Part Posn Mgmt Supervisor, or By Reports To Positions).

This video provides and overview of viewing empty positions on the Company Directory:

Video: Image Highlights, PeopleSoft HCM Update Image 28: Company Directory-Display Empty Positions</td></tr>
</table>

Process Tables

Field or Control	***Description***
Target Record	The **Target Record** field is display only. This field is populated based on the **Tree Structure ID** value. The target record refers to the table containing the source data for all trees created using the selected **Tree Structure ID.**
Delete Inactive Rows	Select this check box to have the process delete rows in the process table associated with inactive employee jobs.

Root Node Definition

The fields in this group box are available when the **Build Action** value *Create/Replace Tree* is selected.

Field or Control	***Description***
Employee ID and **Employment Record**	Enter the employee ID and his or her employment record number that should serve as the topmost node, or root node, of the tree.

Tree Maintenance

Field or Control	***Description***
Delete Old Trees	Select this check box for the process to delete trees older than the number of days listed in the **Days to Keep** field.
Days to Keep	Indicate the number of days back to keep trees.

Start From Node

The field in this group box is available when the **Build Action** value *Update Existing Tree-From Node* is selected.

Field or Control	***Description***
Start Node	Select a node from the tree specified in the **Tree Definition** group box of the page. The Job Tree Builder process will delete any nodes reporting directly or indirectly to the start node specified. Then it will create nodes based on the **Build Method** value selected. **Note:** Depending on how the existing tree was created, an employee may have multiple nodes in the existing tree. For example, this can occur when: - The employee has or had multiple jobs. - The employee reports to a position that has or had multiple incumbents. - The employee is or was assigned to a department with multiple managers (Manage Positions with multiple incumbents). If the prompt list shows multiple nodes for the same person, then review the tree in Tree Manager to ensure that you are selecting the appropriate start node.

Identifying Company Directory Tree Node Queries

PeopleSoft delivers the following Company Directory queries that you can use to analyze the nodes and data for your tree:

Query Name	***Purpose***
Active Employees not in Tree (HRCD_ACTIVE_EMPS_NOT_IN_TREE)	Lists active employees (by business unit) who are not in the tree name for which the query is being run. **Note:** Results depend on the user's row level security settings to employee data.
Nodes reporting to secondary (HRCD_JOB_RPT_TO_NON_PRIM_JOBS)	Returns a list of nodes representing jobs that report to non-primary (additional) job nodes in the Tree.

Query Name	***Purpose***
Nodes for Inactive Jobs (HRCD_NODES_WITH_INACTIVE_JOBS)	Returns nodes that represent currently inactive jobs for a given tree name and as of date. These nodes will remain in the tree until the tree is updated manually using Tree Manager or the tree is refreshed using the Job Tree Builder. **Note:** The nodes reported by this query may have other (child) nodes reporting to them. **Note:** Results displayed depend on the user's row level security settings to employee data.
All non-primary job nodes (HRCD_NON_PRIMARY_JOBS_IN_TREE)	Returns a list of all nodes representing non-primary (additional) jobs in the tree.

Folder Administration Page

Use the Folder Administration page (PORTAL_FLDR_ADM) to update the portal folder definition for the Company Directory.

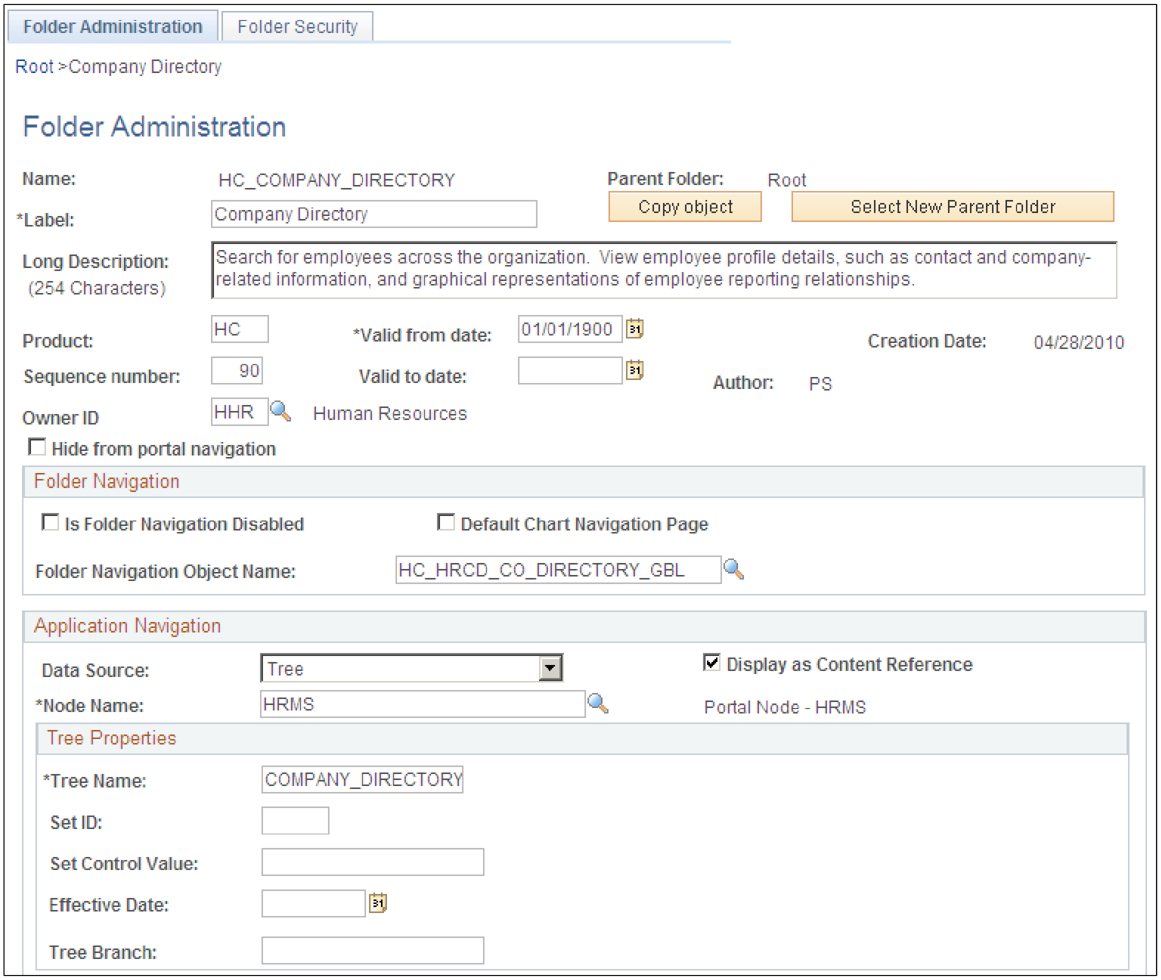
The portal folder HC_COMPANY_DIRECTORY is delivered to use the tree name *COMPANY_DIRECTORY.* If your organization uses another name, you will need to update the portal folder definition in order for the Company Directory to work properly to match the tree name you entered when creating your tree.

Navigation:

PeopleTools > **Portal** > **Structure and Content**

Click the **Edit** link for the Company Directory folder.

This example illustrates the fields and controls on the Folder Administration page. You can find definitions for the fields and controls relevant to the Company Directory later on this page.



Field or Control	***Description***
Element Definition	Enter the tree name you used when building the tree for the Company Directory. This tells the Company Directory where to find the structure for the portal breadcrumbs and org chart. For trees based on the tree structure ID of *COMPANY_DIRECTORY,* the system uses the required **Tree Name** field to uniquely identify a tree. The delivered field value is *COMPANY_DIRECTORY,* but the Company Directory will work with any tree name as long as you created the tree based on the *COMPANY_DIRECTORY* tree structure ID.

Field or Control	***Description***
Effective Date	(Optional) Enter the effective date for the tree. If this field is populated, the Company Directory uses the effective date of the **Tree Name** value identified on the Folder Administration page. If this field is blank, the Company Directory uses the current effective dated tree identified in **Tree Name** field. Leaving this field blank enables you to run a nightly process that creates a new effective-dated version of the tree. If the **Effective Date** field is left blank, you do not need to make any changes to the Folder Administration page because the Company Directory will always use the current tree.

For more information and details on setting up and working with the portal folders, see *PeopleTools: PeopleTools Portal Technologies,* "Administering Portals," Understanding Folder Administration.

Chart and Profile Field Map Page

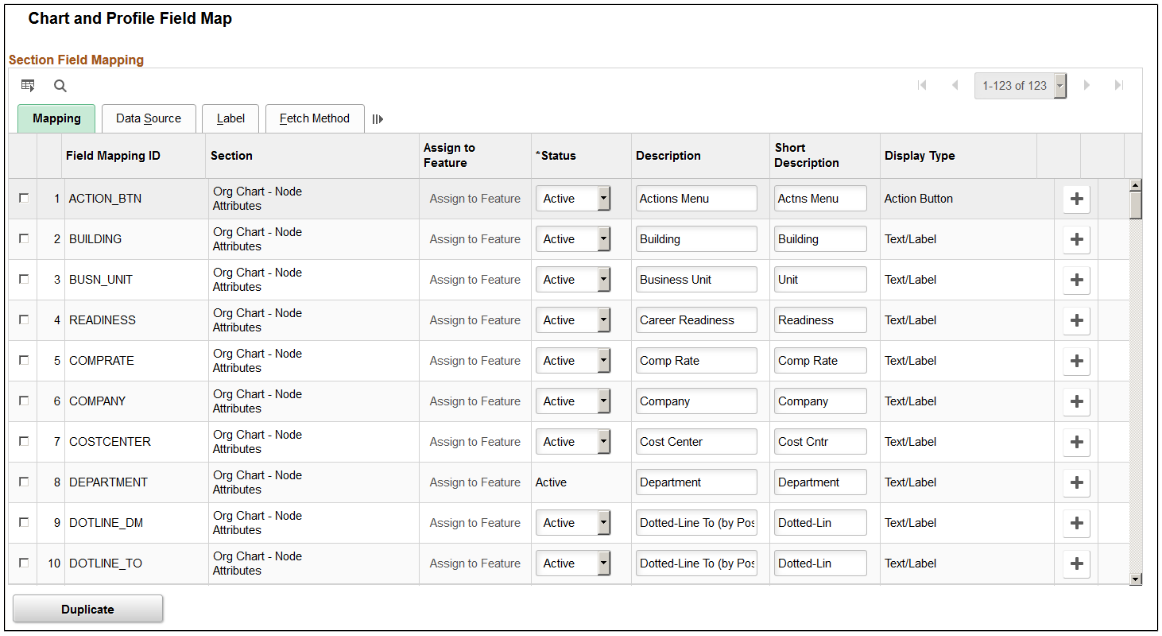
Use the Chart and Profile Field Map page (HRCD_SETUP_FLD_MAP) to define the org chart and profile field page mappings.

Maintain or add additional fields that should be available on the Org Chart and Profile pages of the Org Chart Viewer.

Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Chart and Profile Field Map** > **Chart and Profile Field Map**

This example illustrates the fields and controls on the Chart and Profile Field Map page: Mapping tab. You can find definitions for the fields and controls later on this page.



Use the Chart and Profile Field Map component to define the data elements that are configured in the Chart and Profile Settings pages as well as the Talent Summary setup pages. This component has four tabs that you use to define the rules for fetching and displaying each data element.

Mapping Tab

Use this tab to map the data elements.

The delivered data that appears on this tab cannot be modified except for Status, Description, and Short Description.

Field or Control	***Description***
Section	Enter the section that is located on the various pages to which this field should be mapped. Valid values are *Profile - HR Details*, *Profile - Contact Information*, *General,* and *Org Chart - Node Attributes*. **Note:** The *General* field option is used for the Talent Summary feature.
Assign to Feature	Click this link to open the Org View Mapping page and identify which org view types will have access to use this field. If an org view type is not selected, this field will not be available in the Chart and Profile Settings component.

Field or Control	***Description***
Status	Indicate if this field is *Active* or *Inactive. Inactive* fields will not be available for selection on the setup pages.
Description and **Short Description**	Enter the field description that should display in the drop-down list of the setup pages. You select which description to use on the Label tab.
Display Type	Specify the field format the system should use on the Org Chart Viewer pages. Values are: • *Action Btn* • *Drop-Down* • *Email Link* • *HTML* • *Hyperlink* • *Text* • *Text/Label* The values are specific only to system data rows: • *Action-Btn* • *Drop-Down*

Data Source Tab

Use this tab to identify the source record information specific to the data element.

This example illustrates the fields and controls on the Chart and Profile Field Map page: Data Source tab. You can find definitions for the fields and controls later on this page.

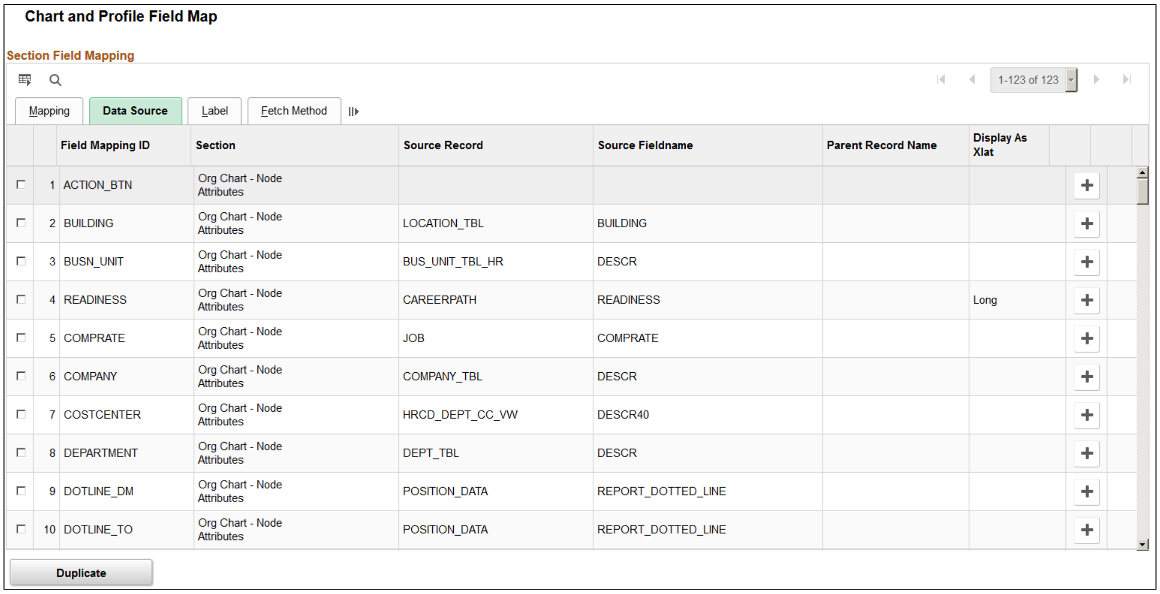


Chart and Profile Field Map

Section Field Mapping

1-123 of 123

Mapping | Data Source | Label | Fetch Method

	Field Mapping ID	Section	Source Record	Source Fieldname	Parent Record Name	Display As Xlat
1	ACTION_BTN	Org Chart - Node Attributes				
2	BUILDING	Org Chart - Node Attributes	LOCATION_TBL	BUILDING		
3	BUSN_UNIT	Org Chart - Node Attributes	BUS_UNIT_TBL_HR	DESCR		
4	READINESS	Org Chart - Node Attributes	CAREERPATH	READINESS		Long
5	COMPRATE	Org Chart - Node Attributes	JOB	COMPRATE		
6	COMPANY	Org Chart - Node Attributes	COMPANY_TBL	DESCR		
7	COSTCENTER	Org Chart - Node Attributes	HRCD_DEPT_CC_VW	DESCR40		
8	DEPARTMENT	Org Chart - Node Attributes	DEPT_TBL	DESCR		
9	DOTLINE_DM	Org Chart - Node Attributes	POSITION_DATA	REPORT_DOTTED_LINE		
10	DOTLINE_TO	Org Chart - Node Attributes	POSITION_DATA	REPORT_DOTTED_LINE		

Duplicate

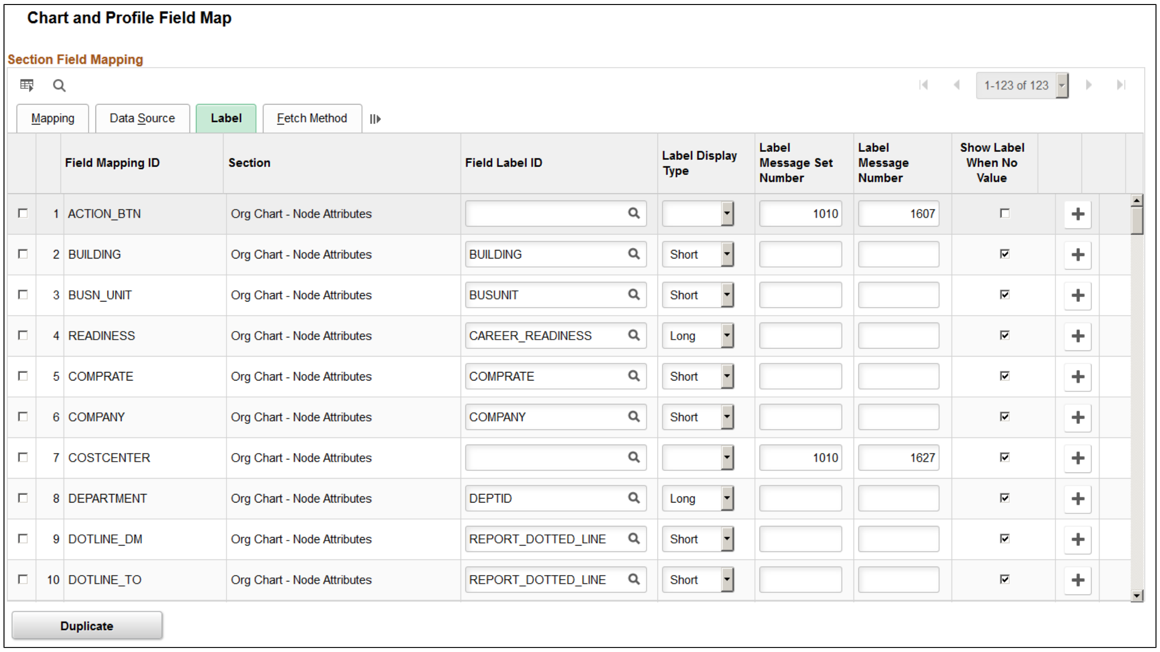
The delivered data in this tab cannot be modified.

Field or Control	***Description***
Source Record	Indicate the record from which the field element is derived.
Source Fieldname	Indicate the field name of the source record from which the field element value is derived.
Parent Record Name	Identify the intermediate record needed to get from the Org Chart Viewer to the data to be displayed by the respective data element class. This is not necessarily the source record's parent record.
Display as Xlat	If the source field is defined to use the Translate Table, then specify if the field should display the long or short name.

Label Tab

Set label information for the data element that will display in the Org Chart Viewer.

This example illustrates the fields and controls on the Chart and Profile Field Map page: Label tab. You can find definitions for the fields and controls later on this page.



	Field Mapping ID	Section	Field Label ID	Label Display Type	Label Message Set Number	Label Message Number	Show Label When No Value
1	ACTION_BTN	Org Chart - Node Attributes			1010	1607	
2	BUILDING	Org Chart - Node Attributes	BUILDING	Short			☑
3	BUSN_UNIT	Org Chart - Node Attributes	BUSUNIT	Short			☑
4	READINESS	Org Chart - Node Attributes	CAREER_READINESS	Long			☑
5	COMPRATE	Org Chart - Node Attributes	COMPRATE	Short			☑
6	COMPANY	Org Chart - Node Attributes	COMPANY	Short			☑
7	COSTCENTER	Org Chart - Node Attributes			1010	1627	☑
8	DEPARTMENT	Org Chart - Node Attributes	DEPTID	Long			☑
9	DOTLINE_DM	Org Chart - Node Attributes	REPORT_DOTTED_LINE	Short			☑
10	DOTLINE_TO	Org Chart - Node Attributes	REPORT_DOTTED_LINE	Short			☑

The delivered data that appears on this tab can be modified.

Field or Control	***Description***
Field Label ID	Enter the field label ID that should be used to display on the Org Chart Viewer pages. For example, the *PHONE_CELL* field would use the Field Label ID *MOBILE* to differentiate it from other phone types, such as work phone.
Label Message Set Number and **Label Message Number**	Enter the message number for this field mapping. Enter the number that will identify the label that should be used for the field on the Org Chart Viewer pages. Do not use these fields if you have entered a value in the **Field Label ID** field.
Show Label When No Value	Select to display the field label even when there is no value to display. For example, If an employee does not have peers, the peers label will still display but with no names listed after it on the Profile page.

Fetch Method Tab

The tab is used to assign the code used for fetching and displaying the data element.

This example illustrates the fields and controls on the Chart and Profile Field Map page: Fetch Method tab. You can find definitions for the fields and controls later on this page.

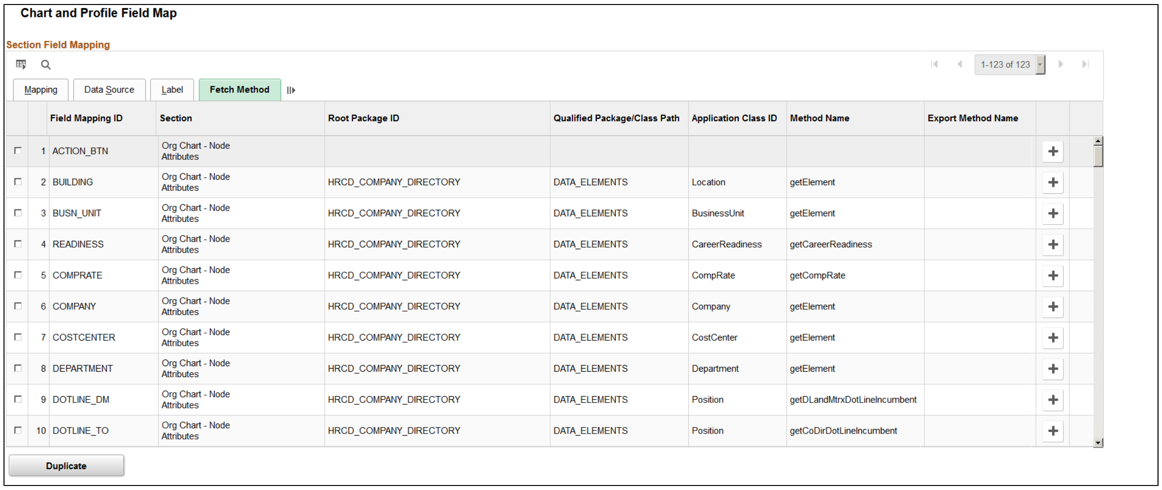


Chart and Profile Field Map

Section Field Mapping

1-123 of 123

Mapping | Data Source | Label | Fetch Method

		Field Mapping ID	Section	Root Package ID	Qualified Package/Class Path	Application Class ID	Method Name	Export Method Name
☐	1	ACTION_BTN	Org Chart - Node Attributes					
☐	2	BUILDING	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	Location	getElement	
☐	3	BUSN_UNIT	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	BusinessUnit	getElement	
☐	4	READINESS	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	CareerReadiness	getCareerReadiness	
☐	5	COMPRATE	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	CompRate	getCompRate	
☐	6	COMPANY	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	Company	getElement	
☐	7	COSTCENTER	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	CostCenter	getElement	
☐	8	DEPARTMENT	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	Department	getElement	
☐	9	DOTLINE_DM	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	Position	getDLandMtrxDotLineIncumbent	
☐	10	DOTLINE_TO	Org Chart - Node Attributes	HRCD_COMPANY_DIRECTORY	DATA_ELEMENTS	Position	getCoDirDotLineIncumbent	

Duplicate

The delivered data in this tab cannot be modified, but new rows can be added.

Field or Control	***Description***
Qualified Package/Class Path	Displays the qualified package/class in the root package ID that resolves the field mapping element value.
Application Class ID	Displays the application class ID in the qualified package/class path that resolves the field mapping element value. **Note:** Any class assigned here must be inherited from HRCD_COMPANY_DIRECTORY:DATA_ELEMENTS: DataElementBase.
Method Name	Displays the method name in the application class ID that resolves the field mapping element value. **Note:** Field mapping IDs that are configured to use a method name *getElement* are using the logic inherited from the base class.
Export Method Name	Displays the method name in the application class ID that resolves the export data for the field mapping element. An export method is only required when if the logic in the class assigned to method name is not also compatible with export.

Additional Contact Types Page

Use the Additional Contact Types page (HRCD_ADDTL_CNTCT) to define additional contact types that will be available to the user on the Profile, Edit Additional Contacts page of the Company Directory.

Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Additional Contact Types** > **Additional Contact Types**

This example illustrates the fields and controls on the Additional Contact Types page. You can find definitions for the fields and controls later on this page.

Additional Contact Types

Employee Options

Select	Contact Type	Label	Value Format	Instant Messaging Protocol
☑	EMOT	Other Email	Email	
☑	EMPE	Personal Email	Email	
☑	IMGT	Instant Msg GTALK	Instant Message	GTALK
☑	IMMS	Instant Msg MSN	Instant Message	MSN
☑	IMXP	Instant Msg XMPP	Instant Message	XMPP
☑	IMYH	Instant Msg YAHOO	Instant Message	YAHOO
☑	PHHM	Home Phone	Text	
☑	PHHO	Home Office Phone	Text	
☑	PHMO	Mobile Phone	Text	
☑	PHOT	Other Phone	Text	
☑	USER	Other	Text or Email	

Add Row

Field or Control	***Description***
Select	Select the contact types that should be available to the user on the Edit Additional Contacts page when the user updates his or her additional contact information on the Profile page of the Org Chart Viewer. If you deselect an option, this contact type will not be available to the user. The following contact types are delivered selected: • *EMOT* - Other Email • *EMPE* - Personal Email • *PHHM* - Home Phone • *PHHO* - Home Office Phone • *PHMO* - Mobile Phone • *PHOT* - Other Phone • *USER* - Other
Contact Type	Enter a unique four letter code to identify the contact type. This page sorts the contact types by the code. However the Edit Additional Contacts page accessible from the Profile pages of the Org Chart Viewer sorts them by label name.

Field or Control	Description
Label	Enter the name of this type of contact. This value will appear in the **Contact Type** drop-down list and as the label, of display as, name on the add or edit contact pages. This label will appear on the Profile pages of the Org Chart Viewer when a user selects and enters a value for this contact type. The following text or email contact types are delivered with the system: • *BPHO* – Business Phone • *EMOT* – Other Email • *EMPE* – Personal Email • *PHHM* – Home Phone • *PHHO* – Home Office Phone • *PHMO* – Mobile Phone • *PHOT* – Other Phone • *USER* - Other The following instant messaging contact types are delivered with the system: • *IMGT* – Instant Msg GTALK • *IMMS* – Instant Msg MSN • *IMXP* – Instant Msg XMPP • *IMYH* – Instant Msg YAHOO These labels are display-only for the user with the exception of the **Other** field. The contact type *Other* enables users of the Company Directory to enter their own label or field description for a contact type.
Value Format	Select the format the system should use for this field. Options are *Email, Instant Message, Text,* and *Text or Email.*
Instant Messaging Protocol	Identify the IM protocol that should be associated with this IM contact type. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* This field is available when you select *Instant Message* from the **Value Format** field. With the delivered IM contact types, the field displays the associated IM protocol type.
Add Row	Click this button to add additional contact types in the **Employee Options** group box. This will open up free-form text fields in which the administrator can enter the field labels and determine the value format that will be available to the user.

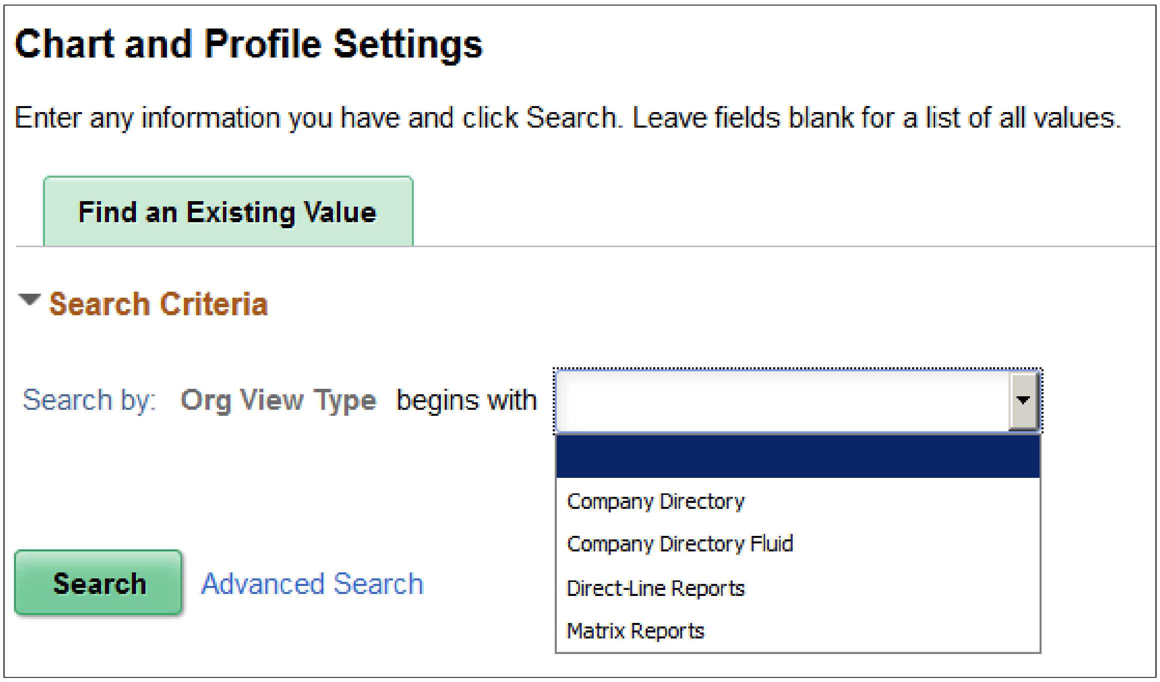
Chart and Profile Settings Page

Use the Chart and Profile Settings search page to select an org view type for page configuration.

Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Chart and Profile Settings** > **Chart and Profile Settings**

This example illustrates the fields and controls on the Chart and Profile Setting search page. You can find definitions for the fields and controls later on this page.



You use the Chart and Profile Settings component to configure the pages of the Org Chart Viewer for each org view type.

- The desktop Org Chart Viewer component consists of up to three types of organizational views (shown as folders and tabs to the user). The PeopleSoft application delivers these desktop org view types:
  - *Company Directory* — a view of the Company Directory.
  - *Direct-Line Reports* — a view of a user's direct-line reports.
  - *Matrix Reports* — views of the matrix teams associated with a user.
- You can also define settings for the PeopleSoft Fluid User Interface, which is designed to be used on mobile devices, but can also be used on a laptop and desktop. The PeopleSoft application delivers the *Company Directory Fluid* org view type for this.

All org view types use a similar setup format. The Chart and Profile Settings component may contain up to three pages (the General Settings, Profile Content, and Org Chart Content pages), however, some fields and pages are hidden depending upon the org view type you select.

Field or Control	***Description***
Org View Type	Select from one of the list of valid values to define the setup for that specific org view type. Valid values for the desktop version of the org chart viewer are *Company Directory, Direct-Line Reports,* or *Matrix Reports.* The valid value for the PeopleSoft Fluid User Interface is *Company Directory Fluid.*

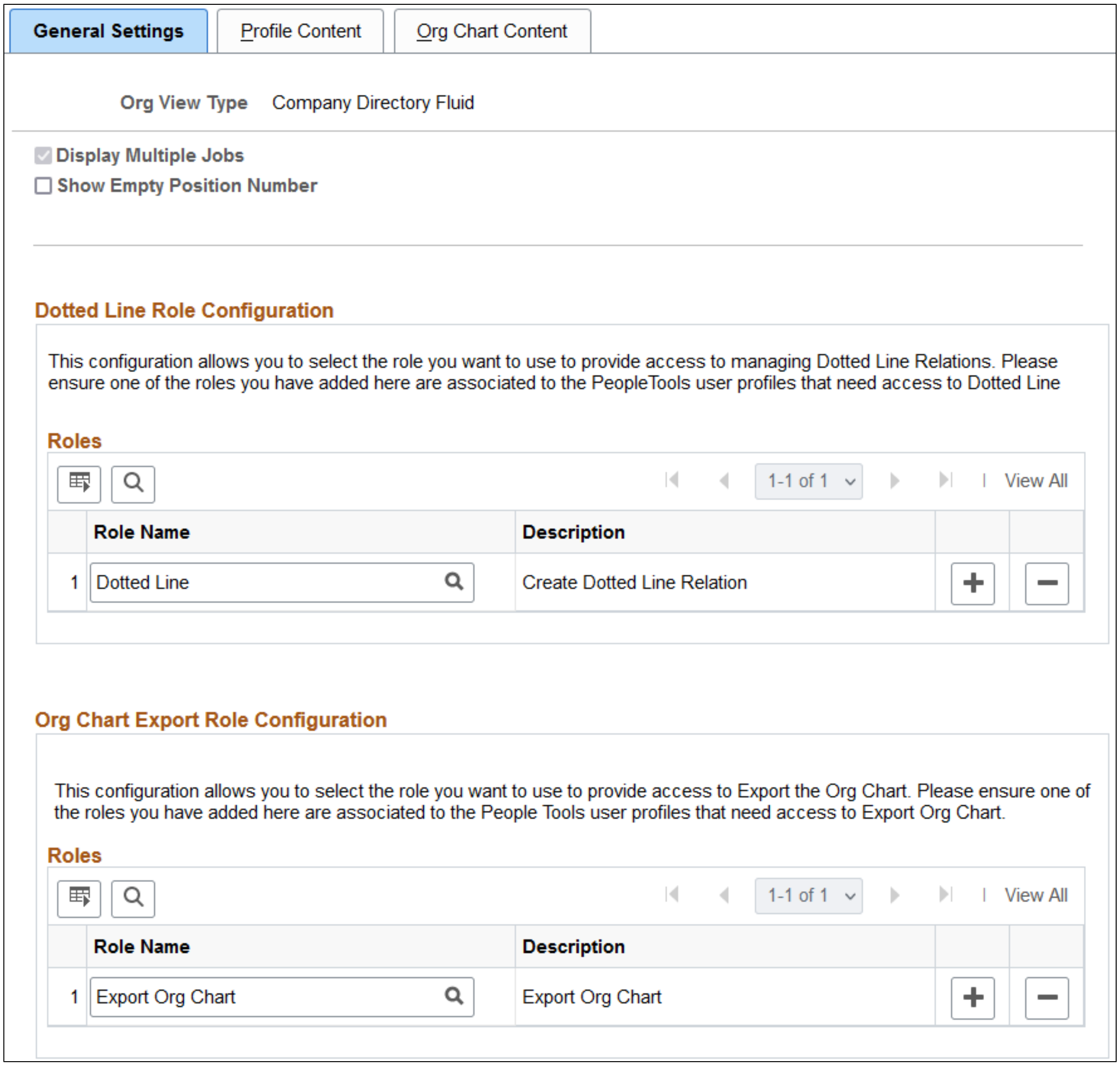
Chart and Profile Settings - General Settings Page

Use the General Settings page (HRCD_SETUP_GENERAL) to define default startup page content and layout settings for each org view type.

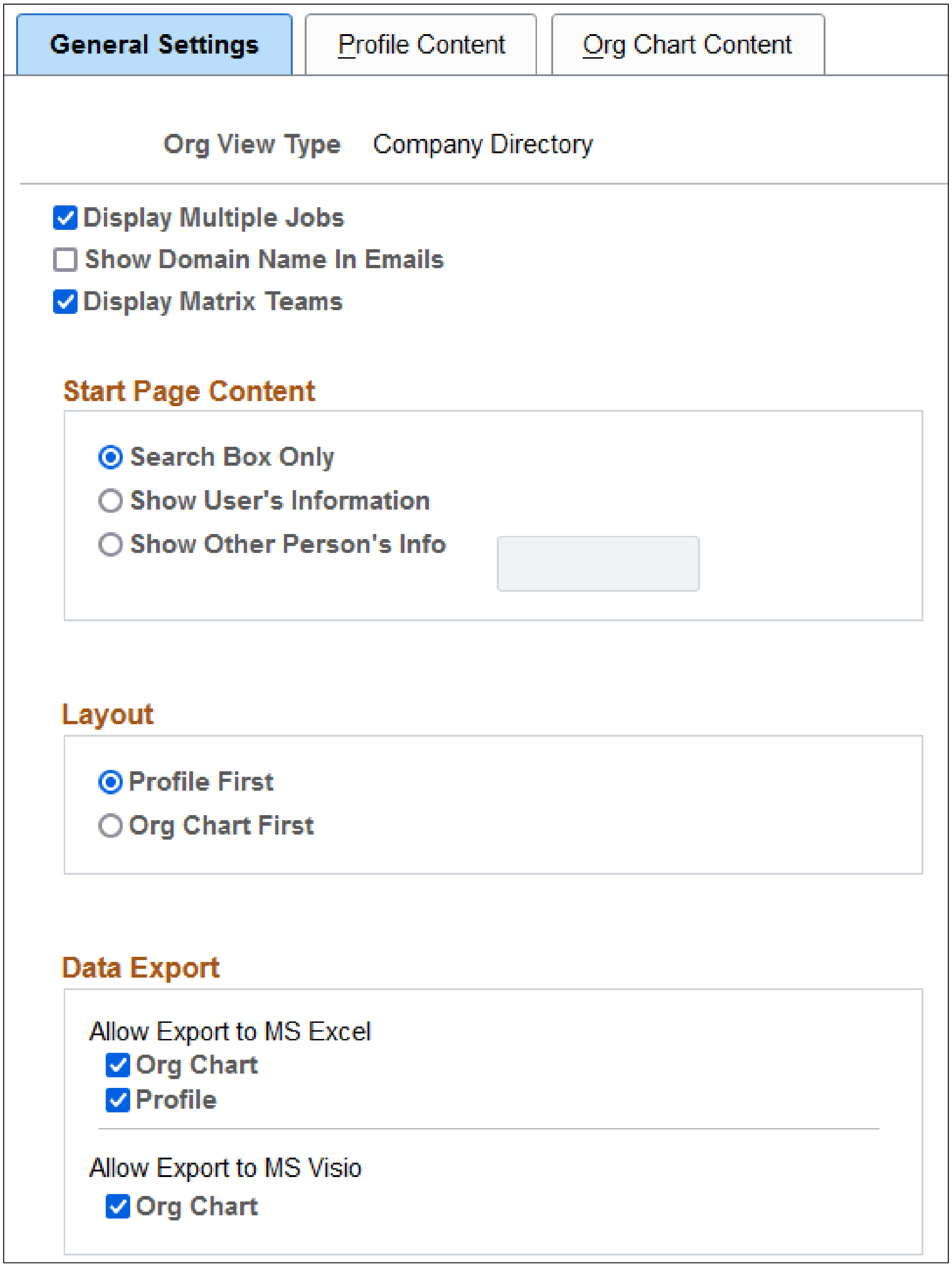
Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Chart and Profile Settings** > **General Settings**

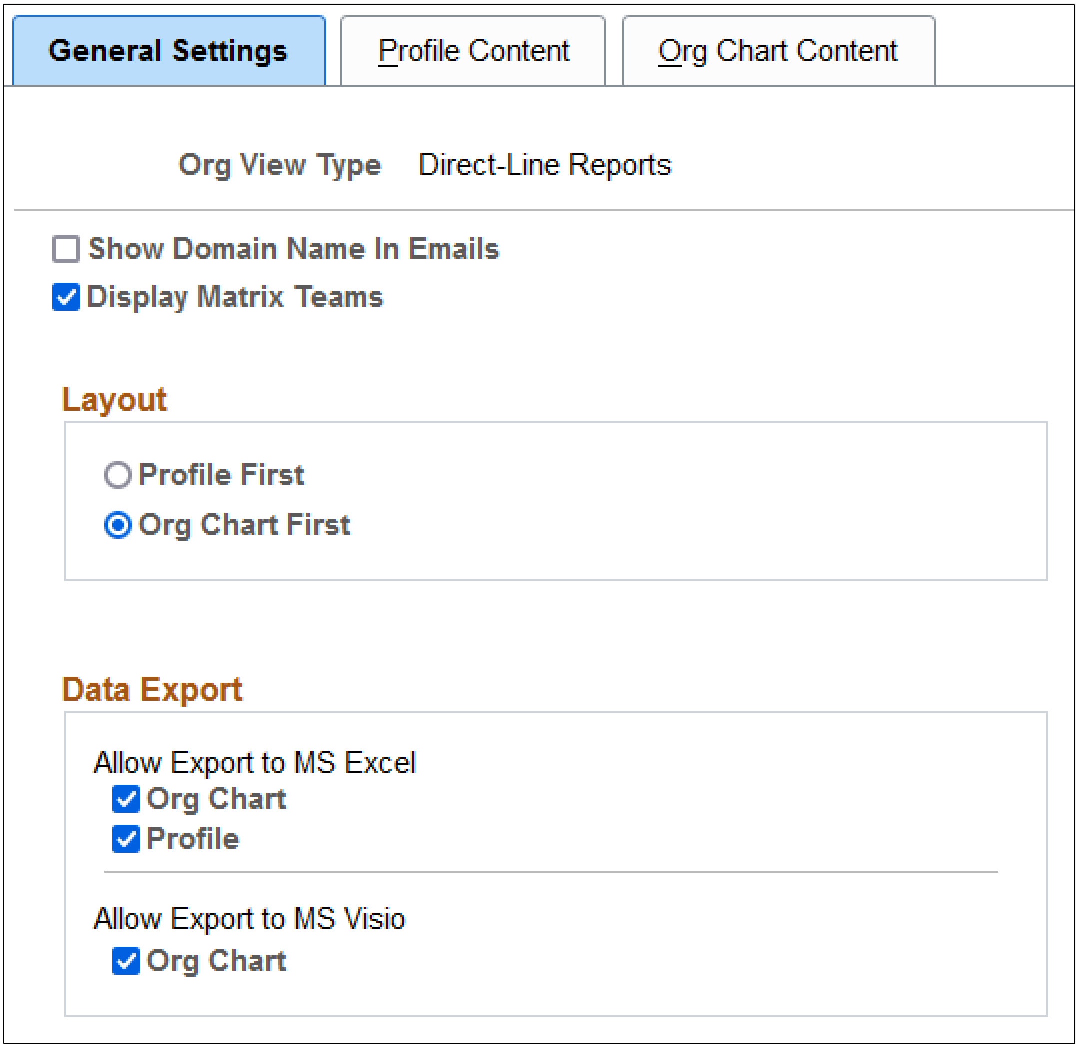
This example illustrates the fields and controls on the Chart and Profile Settings – General Settings page for the *Company Directory Fluid* org view type.



This example illustrates the fields and controls on the Chart and Profile Settings – General Settings page for the *Company Directory* org view type.



This example illustrates the fields and controls on the Chart and Profile Settings – General Settings page for the *Direct-Line Reports* and *Matrix Reports* org view types.



Field Availability on the General Settings Page by Org View Type

These tables list the field elements available on the Chart and Profile Settings - General Settings page according to the Org View Type value you select:

`Fields at the top of the page:`

The following field elements are available at the top of the page for the mentioned org view types:

Page Element	***Company Directory Fluid***	***Company Directory***	***Direct-Line Reports***	***Matrix Reports***
Display Multiple Jobs	Yes (display only)	Yes	N/A	N/A

Page Element	*Company Directory Fluid*	*Company Directory*	*Direct-Line Reports*	*Matrix Reports*
Show Empty Position Number	Yes	N/A	N/A	N/A
Show Domain Name in Emails	N/A	Yes	Yes	Yes
Display Matrix Teams	N/A	Yes	Yes	Yes

`Dotted Line Role Configuration group box:`

The following field elements are available in the **Dotted Line Role Configuration** group box for the mentioned org view type:

Page Element	*Company Directory Fluid*
Role Name	Yes

This video demonstrates the dotted line role configuration feature:

Video: Image Highlights, PeopleSoft HCM Update Image 24: Company Directory Setup Enhancement

`Org Chart Export Role Configureation group box:`

The following field elements are available in the **Org Chart Export Role Configuration** group box for the mentioned org view type:

Page Element	*Company Directory Fluid*
Role Name	Yes

`Start Page Content group box:`

The following field elements are available in the **Start Page Content** group box for the mentioned org view type:

Page Element	*Company Directory*
Search Box Only	Yes
Show User's Information	Yes

Page Element	*Company Directory*
Show Other Person's Info	Yes

`Layout group box:`

The following field elements are available in the **Layout** group box for the mentioned org view types:

Page Element	*Company Directory*	*Direct-Line Reports*	*Matrix Reports*
Profile First	Yes	Yes	Yes
Org Chart First	Yes	Yes	Yes

`Data Export group box:`

The following field elements are available in the **Data Export** group box for the mentioned org view types:

Page Element	*Company Directory*	*Direct-Line Reports*	*Matrix Reports*
Allow Export to MS Excel - Org Chart	Yes	Yes	Yes
Allow Export to MS Excel - Profile	Yes	Yes	Yes
Allow Export to MS Visio - Org Chart	Yes	Yes	Yes

General Settings

Use the first several check boxes on the General Settings page to specify the amount of detail the system should display about a person.

Field or Control	*Description*
Display Multiple Jobs	This field is available for selection for the *Company Directory* org view type. Select to have the Company Directory search feature return all multiple job or additional job rows for a person. Deselect this option to have the system display the primary job only for the person. **Note:** For the *Company Directory Fluid* org view type, this field is display only and comes from the setting that was selected for the *Company Directory* org view type. When you select this check box, the **Title-Job** fields on the Profile Content and Org Chart Content pages will be automatically selected. Also, the Company Directory - Profile page will display the **Additional Jobs** field in the HR Details group box. **Note:** Selecting the **Display Multiple Jobs** check box will allow additional jobs in the search only when these jobs are present in the tree. You may need to refresh the tree using the Job Tree Builder component or update the tree manually in Tree Manager. See Tree Builder Run Control Page.
Show Empty Position Number	This field is available for the *Company Directory Fluid* org view type. Select this check box to have the Company Directory pages display the position number in an empty position row or org chart node box. The text *Empty Position* and the position title always display for rows or org chart nodes of vacant positions. Deselect this option to display only the text *Empty Position* and the position title without the position number. This check box is deselected by default. **Note:** You must use a Company Directory tree that includes empty positions in order for empty positions to appear within the Company Directory pages. For more information on building trees that include empty positions, see the Tree Builder Run Control Page topic.

Field or Control	***Description***
Show Domain Name in Emails	This field is available for the desktop org view types. Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the @ sign in an email address. Deselect this check box to not have the system display the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business email address. With this option deselected, the full email address still appears when the user places the mouse over an email address field. **Note:** The selection you make here does not affect the email addresses entered by end-users in the Additional Contact Information group box of the Profile page.
Display Matrix Teams	This field element is available the desktop org view types. Select this check box to enable the user to view or export hierarchical reporting details for a matrix team. See the **Data Export** group box on this page.

Dotted Line Role Configuration

This field is available for the *Company Directory Fluid* Org View Type.

Field or Control	***Description***
Role Name	Select the role or roles that will provide a user access to the Profile - Manage Dotted Line Page, where a person can create or remove dotted line reporting relationships. The PeopleSoft application delivers the *Dotted Line* role for this purpose, but you can identify other roles that should be granted access to the dotted line pages. You must ensure that at least one of the rows entered here is associated with a user’s profile. **Note:** If no roles are defined in this setup grid, users will not be able to manage dotted line relationships in the Company Directory profile pages.

Org Chart Export Role Configuration

This field is available for the *Company Directory Fluid* Org View Type.

Field or Control	***Description***
Role Name	Select the role or roles that will provide a user the ability to export the org chart data from the Organization Chart Page. When you enter a role here and assign this role to the user, the **Export to Excel** and **Export to Visio** menu items will be available from the Actions List. The PeopleSoft application delivers the *Export Org Chart* role for this purpose, but you can identify other roles that should be granted access to export org chart functionality from the Actions List menu of the Company Directory Org Chart page. You must ensure that at least one of the rows entered here is associated with a user's profile. **Note:** If no roles are defined in this setup grid, users will not be able to export the Company Directory organization chart from the fluid pages.

Start Page Content

These fields are available for the *Company Directory* Org View Type.

Use this group box to specify the default settings for the Company Directory start page. Choose from one of the three options to define what information the system should display to the user when first accessing the Company Directory. Users can override this default setting by defining their own preferences.

Field or Control	***Description***
Search Box Only	Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system. You will also have the option to use an advanced search, where you can enter additional search criteria.
Show User's Information	Select this option to have the system display the information of the user accessing the Org Chart Viewer pages. The user will appear as the focus of the node or Profile page, depending on the layout setting selected. The search field is also available at the top of the page when you select this option.

Field or Control	*Description*
Show Other Person's Info	Select this option and enter a person's employee ID in the accompanying field to have the system display the information of this employee on the startup page. The identified person will appear as the focus of the node or the Profile page, depending on the layout setting selected. **Note:** In order to populate this field, a tree must already be created and the tree name must match the Tree Name provided on the portal folder definition HC_COMPANY_DIRECTORY. For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Administering Portals," Managing Portal Objects.

See Org Chart Viewer - Preferences Page.

Layout

These fields are not available for the *Company Directory Fluid* org view type.

Use this group box to define which page of the Org Chart Viewer pages the system should display first. The value you select here will determine the page order. The user can override these default settings by defining personal preferences.

Field or Control	*Description*
Profile First	Select this option to have the system display the Profile page for the focus person. The Profile page displays detailed information about the person, such as contact information, HR details, and personalized links and information. This option will also display the Profile page as the first page in the component.
Org Chart First organizational chart first	Select this option to have the system display the Org Chart page. The Org Chart page displays a multi-leveled graphical representation of the focus person's reporting structure, as well as high-level details about this person. This option will also display the Org Chart page as the first page in the component.

See Org Chart Viewer - Preferences Page.

Data Export

These fields are not available for the *Company Directory Fluid* org view type.

Use this group box to enable exporting options for the user.

Field or Control	***Description***
Allow Export to MS Excel (allow export to Microsoft Excel) – **Org Chart** and **Profile**	Select these check boxes to enable the user to export profile or org chart information to a Microsoft Excel spreadsheet. Users will be able to export the following hierarchical reporting details: • Focus node's manager. • Focus node. • Focus node's siblings if such is selected to display via the Org Chart tab setting. • Focus node's hierarchy (from focus node down); all of the manager's direct or dotted-line (matrix) reports, and their indirect reports.
Allow Export to MS Visio – Org Chart	Select this check box to enable the user to export org chart information to a Microsoft Visio drawing.

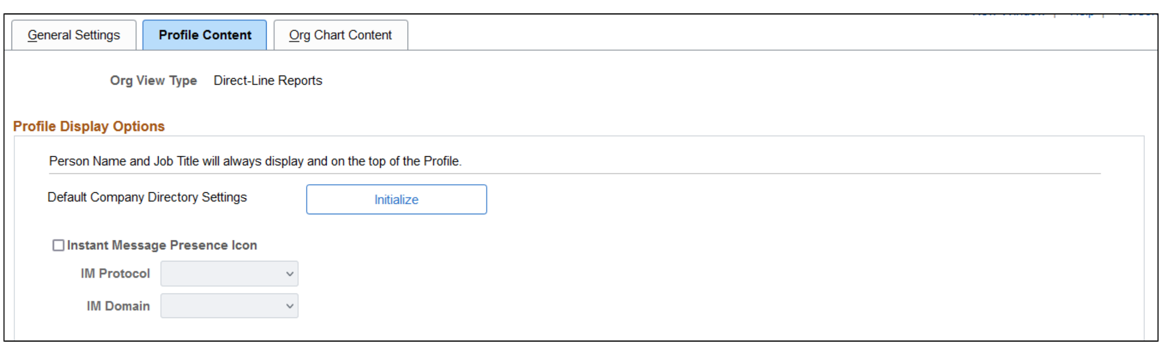
Chart and Profile Settings - Profile Content Page

Use the Profile Content page (HRCD_SETUP_PROFILE) to select the contact information, HR details, and employee personalization field options that should appear on the Profile page for each org view type.

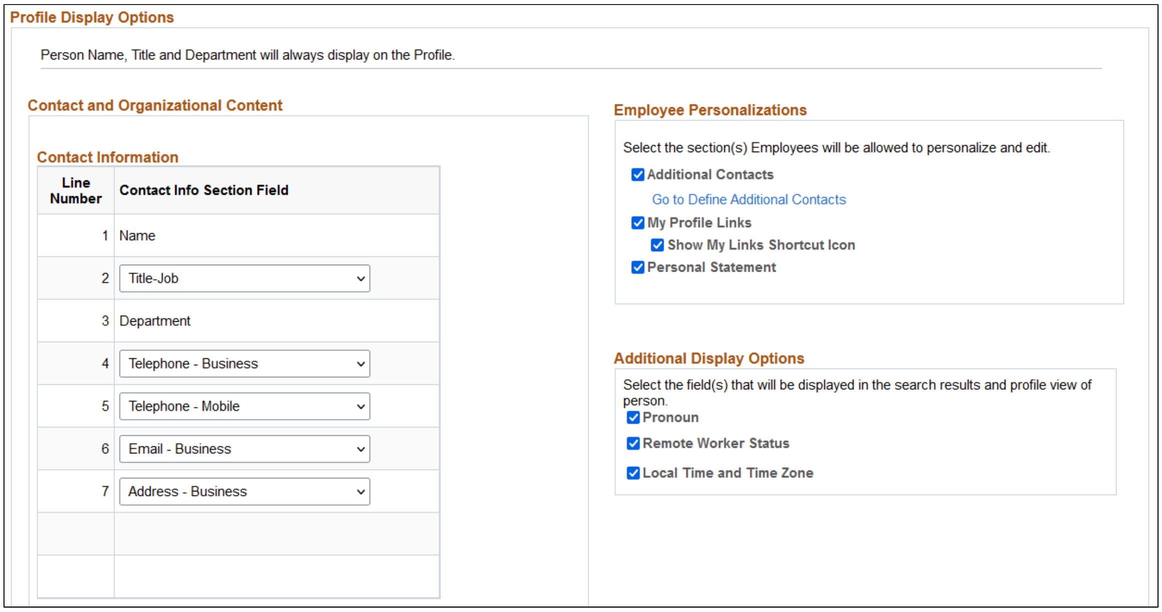
Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Chart and Profile Settings** > **Profile Content**

This example illustrates the Profile Display Options section of the Chart and Profile Settings - Profile Content page (1 of 3). This example applies to all Org View Types, with the exception of the Company Directory Fluid type.



This example illustrates sections of the Chart and Profile Settings - Profile Content page (2 of 3) for the *Company Directory Fluid* type. Similar fields are found on the other Orv View Types with the exception of the Additional Display Options, which is specific to the Fluid pages.



This example illustrates the Job Details section of the Chart and Profile Settings - Profile Content page (3 of 3) for all types except the Company Directory Fluid type, which does not have the Allow Export column.

The Profile pages will display detailed information about a person using the fields you select on this page for the individual org view types. The field content is specific to the org view type.

The field elements on this page are available for all org view types unless otherwise specified.

Profile Display Options

Field or Control	*Description*
Initialize	Click to have the system provide by default the same settings you established for the *Company Directory* org view type. This field element is available for the following org view types: *Direct-Line Reports* and *Matrix Reports.*

The Instant Message field elements are not available for the *Company Directory Fluid* org view type.

Field or Control	*Description*
Instant Message Presence Icon	Select this check box to have the Profile page display the IM icon for a person, if an IM address exists for a person. Store instant message IDs for a person on the Contact Information page of personal data in HR.
IM Protocol (instant messaging protocol)	Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* If a person does not have this IM protocol type defined in their personal data, the icon will not display for this person. This field is available when you select the **Instant Message Presence** Icon check box.
IM Domain	Displays the Instant Message domain associated with the **IM Protocol** you selected for all protocols except *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization. See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"

Contact and Organizational Content

Select fields in this group box that should appear on the Profile page. This information comes from the HR tables. The field elements in this group box are available for all org view types unless otherwise specified.

Field or Control	***Description***
Contact Information	Select contact-related fields that will appear as person profile data in the **Contact Information** group box or page of the Company Directory - Profile page. **Note:** Although the **Contact Information** section will display the fields in the order you select, it will first group the information in the following contact type order and then by the order you select: 1. Phone number types 2. Email types 3. Address types 4. Other For example, you have defined the following sort order: *Address- Business* *Telephone - Mobile* *Email - Business* *Telephone - Business* The **Contact Information** section will display phone number contacts first, then email contacts, then addresses, with each group sorting the content within those contact types according to your defined order. In this scenario it would appear like the following: *Telephone - Mobile* *Telephone - Business* *Email - Business* *Address- Business* Valid field values are: • *Name* This field display is always selected and listed as line number *1*. • *Title-Job* For the *Company Directory* org view type, *Title - Job* is always selected for line number *2* when **Display Multiple Job** is selected on the Chart and Profile Settings - General Settings Page. If **Display Multiple Job** is deselected, then you have the option of selecting *Title-Job* or leaving this field blank. For the *Company Directory Fluid* org view type, *Title-Business*, *Title-Job*, and *Title-Position* are available for selection on line number *2*. If you leave this field blank, the system will show the job title. For the other org view types, *Title-Job* value is always selected.

Field or Control	Description
	• *Action Menu* *Actions Menu* is the only field display option available for line number *9*. Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change, or for direct or indirect reports. The *Actions Menu* values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content. For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Developing and Configuring Related Content". • *Department* *Department* is always selected for the *Company Directory Fluid* org type for line number *3*. These options are available for the remaining line numbers: • *Address - Business* When you select and address field and you have licensed and enable Oracle Maps Services on the Installation table, the page will display the View Address Map button to access a map of the address on the Profile pages. • *Building* • *Email - Business* • *Floor Nbr* (not available for the *Company Directory Fluid* org view type) • *Location* (not available for the *Company Directory Fluid* org view type) • *Telephone - Business* • *Telephone - Mobile* Addition values specific to the *Direct-Line Reports* and *Matrix Reports* org view types: • *Career Readiness* * • *Comp Rate* * • *Hire Date*

Field or Control	Description
	• *Impact of Loss* * • *Organizational Relationship* • *Risk of Leaving* * • *Talent Category* * **Note:** * These field elements are considered to be sensitive data. Sensitive data will only display if the employee reports to the signed-in user, hence the user will only see this information for his or her subordinates.

Field or Control	Description
Job Details	Select job detail fields that will appear as person profile data in the **Job Details** group box or panel of the Profile page. The pages will display the fields in the order you select them on this page. Select from these valid values for all remaining org view types: • *Business Unit* • *Company* • *Cost Center* • *Department* (selected in the Contact Information group box for the *Company Directory Fluid* org view type) • *Direct Reports* (provided as a page for the fluid user) • *Dotted-Line To (by Position)* (not available for the *Company Directory Fluid* org view type) • *Job Family* • *Job Function* • *Manager Level* • *Organizational Relationship* • *Peers* (provided as a page for the fluid user) • *Employee ID* • *Regular/Temporary* • *Reports To* (not available for the *Company Directory Fluid* org view type) • *Standard Hours* • *Standard Work Period* • *Union* • *Years of Service* Value specific to the *Company Directory* org view type: *Additional Jobs*. Value specific to the *Company Directory* and *Direct-Line Reports* org view types: *Teams* (provided as a page for the fluid user).

Field or Control	Description
	Value specific to the *Direct-Line Reports* org view type: *Salary Plan/Grade/Step*. **Note:** *Salary Plan/Grade/Step* is considered to be sensitive data. Sensitive data will only display if the employee reports to the user, hence, the user will only see this information for his or her subordinates. Value specific to the *Direct-Line Reports* and *Matrix Reports* org view types: *Reports Count - Total*. Values specific to the *Matrix Reports* org view type: • *Other Teams* • *Team Directs* • *Team Peers* • *Team Reports To* • *Team Total Reports* When there is an empty position, only these values will display, if selected: • *Direct Reports* • *Dotted-Line To (by Position)* • *Job Family* • *Job Function* • *Manager Level* • *Peers* • *Reports To* • *Union* Values specific to the *Company Directory Fluid* org view type: • *Address - Location* • *Building* • *Employee ID* • *Location*

Field or Control	***Description***
Allow Export	Select this check box to enable the user to export this field content. This page element is not available for the *Company Directory Fluid* org view type.
Select for Delete and **Delete**	Select the check box after a field and use the **Delete** button to remove a field from appearing on the Profile page. The system automatically re-sequences line numbers when you delete rows in the middle of the grid.
Add	Select the **Add** button to identify additional fields that should appear on the Profile page.

Employee Personalizations

Use information in this group box to determine which personalization group boxes should appear on the right side of the Profile page.

Field or Control	***Description***
Additional Contacts	Select this option to enable the user to add or edit contact information on the Profile page. When a person has added additional contact information, it will also appear on the page. If you deselect this option, the Profile page will not display additional contact information added by a person and users will not be able to add other contact information in the company directory.
Go to Define Additional Contact Types link	Click this link to access the Additional Contact Types page to add or review contact types. See Additional Contact Types Page.
My Profile Links	Select this option to have the **My Profile Links** group box available on the Profile page. Profile links enable the user to define shortcut links to other web sites. When you select this option, the **Show My Links Shortcut Icon** check box on this page will be available for selection. If you deselect this option, the **My Profile Links** group box will not be available on the Profile page.

Field or Control	Description
Show My Links Shortcut Icon	Select this check box to have the shortcut icons associated with target web addresses appear next to the label entered by the user. Some sites may or may not have a default shortcut icon. For example, when this check box is selected, and the user enters the web address for Oracle (http://oracle.com), the following icon will appear next to the label name. This option is available when the **Display My Profile Links** check box is selected.
Personal Statement	Select this option to have the **Personal Statement** group box available on the Profile page. This functionality enables the user to enter personalized text. Users will update their personal statement using the Rich Text Editor. See *PeopleTools: Using PeopleSoft Applications,* "Using PeopleSoft Application Pages," Working With the Rich Text Editor If you deselect this option, the **Personal Statement** group box will not be available on the Profile page.

Additional Display Options

This section is only available for the *Company Directory Fluid* org view type.

This video demonstrates the additional display configuration options:

Video: Image Highlights, PeopleSoft HCM Update Image 45: Additional Display Configurability for Company Directory

Field or Control	***Description***
Pronoun	**Note:** Gender Identity functionality must be enabled on the Installation Table - “HCM Options Page” (Application Fundamentals) for this section to appear and to use this feature. Select to display a person's pronouns on the Fluid Company Directory pages to help others know how to address a person. (See also Using the PeopleSoft Fluid User Interface for the Company Directory and Company Directory Profile Page Layout). The pages will only display pronouns for those who have provided pronouns (see the employee self service “Gender Details Page” (PeopleSoft eProfile) and the administrator Biographical Details Page of Personal Data). When an employee has not specified a pronoun, the pronouns will not appear on the Company Directory. These videos provide an overview of the gender identity functionality: Video: Image Highlights, PeoleSoft HCM Update Image 41: Gender Identity and Expression Video: PeopleSoft Gender Identity and Expression
Remote Worker Status	Select to have the Fluid Company Directory display a person's remote worker status on the home page and other areas that display a grid of employees. **Note:** This setting does not control the display of the Profile - Remote Worker Status Page on the Company Directory page. The page will appear if the employee has a remote worker request in the system, regardless if you select this option.
Local Time and Time Zone	Select to have the Fluid Company Directory display the person's local time and time zone on the home page and other areas that display a grid of employees. Selecting this check box will also enable an edit time zone option when individuals are on their own profile to specify their time zone.

Related Links

Using the PeopleSoft Fluid User Interface for the Company Directory

“Understanding Gender Identity Tracking” (Application Fundamentals)

Profile Page

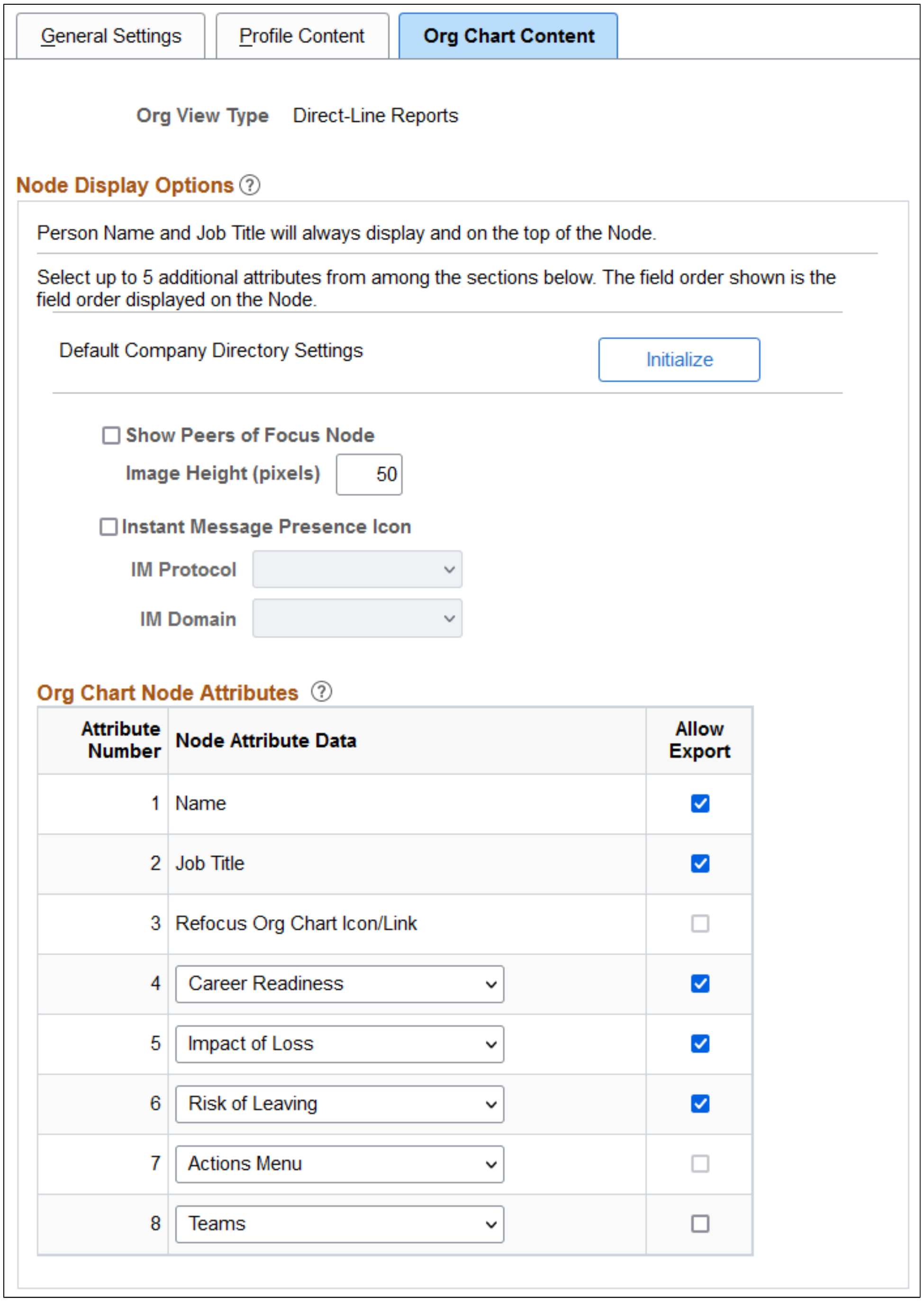
Org Chart Content Page

Use the Org Chart Content page (HRCD_SETUP_OC_NODE) to select the organization chart field options that should appear on the Org Chart page for each org view type.

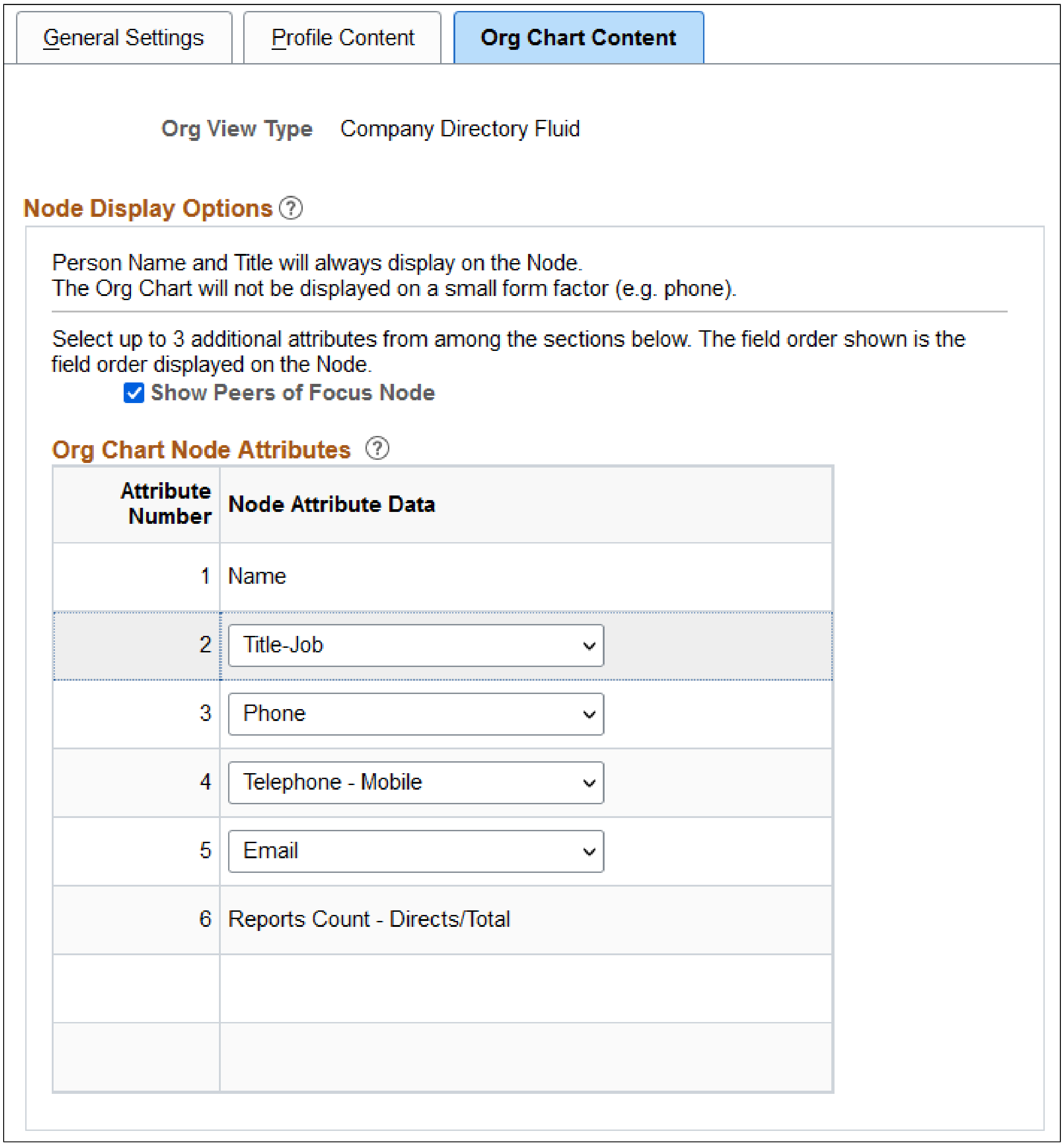
Navigation:

Set Up HCM > **Common Definitions** > **Org Chart Viewer** > **Chart and Profile Settings** > **Org Chart Content**

This example illustrates the Org Chart Content page for org view types *Company Directory*, *Direct-Line Reports*, and *Matrix Reports*.



This example illustrates the Org Chart Content page for the *Company Directory Fluid* org view type.



Node Display Options

Field or Control	***Description***
Initialize	Click this button to have the system provide by default the same settings you established for the *Company Directory* org view type. This field element is available for the following org view types: *Direct-Line Reports* and *Matrix Reports.*

Field or Control	Description
Show Peers of Focus Node	Select this check box to have the system display peers within the same reporting structure level of the focus person. Deselect this check box to show only the focus person at the middle level of the organizational chart. The report to and subordinate nodes will still display for this person, if applicable.
Image Height (pixels)	Enter size in which the height of an employee picture should appear within the node. This option is available when the **Display Photo** check box is selected on the “HCM Options Page” (Application Fundamentals) of the Installation Table. This field element is not available for the *Company Directory Fluid* org view type.

The Instant Message field elements are not available for the *Company Directory Fluid* org view type.

Field or Control	Description
Instant Message Presence Icon	Select this check box to have the Org Chart node display the IM icon for a person, if IM information exists in the HR person model. Instant Message IDs for a person can be stored on the Contact Information page of personal data in HR.
IM Protocol (instant messaging protocol)	Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* If a person does not have an IM protocol type defined in his or her personal data, the icon will not display for this person. This field is available when you select the **Instant Message Presence Icon** check box.
IM Domain	Displays the Instant Message domain associated with the **IM Protocol** you selected for all protocols except *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization. See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"

Org Chart Node Attributes

Field or Control	***Description***
Org Chart Node Attributes	Select field attributes that will display in the individual nodes of the chart on the Org Chart page. The fields within the node will appear in the order of the attribute line number. Valid values for line numbers are: • *Name* This field is always selected and listed as line number *1*. • *Title-Job* For the *Company Directory* org view type, *Title - Job* is always selected for line number *2* when **Display Multiple Job** is selected on the Chart and Profile Settings - General Settings Page. If **Display Multiple Job** is deselected, then you have the option of selecting *Title-Job* or leaving this field blank. For the *Company Directory Fluid* org view type, *Title-Business*, *Title-Job*, and *Title-Position* are available for selection on line number *2*. If you leave this flied blank, the system displays the job title. For the other org view types, *Title-Job* value is always selected. These values are available for selection for the *Company Directory Fluid* org view type: • *Email* • *Telephone – Mobile* • *Phone* • *Reports Count – Directs/Total* – This field attribute is always selected for line number *6*. These remaining field selections discussed here apply to the following org view types: *Company Directory, Direct-Line Reports,* and *Matrix Reports,* unless otherwise noted. • *Refocus Org Chart Icon/Link* This field is always selected and listed as line number *3*. This link appears in each node of the organization chart and enables you to change the focus node to another individual. • *Action Menu*

Field or Control	Description
	Action Menu is the only field display option available for line number *7*. Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change, or to perform these transactions for a direct or indirect report. The *Action Menu* values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content. For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Developing and Configuring Related Content" These values are available for the remaining line numbers. • *Building* • *Business Unit* • *Company* • *Cost Center* • *Department* • *Dotted-Line To* • *Email - Business* • *Floor Nbr* • *Job Family* • *Job Function* • *Location* • *Manager Level* • *Regular/Temporary* • *Reports Count - Directs* The *Reports Count – Directs* option will show the number of employees that directly report to this individual. • *Standard Hours* • *Standard Work Period*

Field or Control	Description
	• *Telephone - Business* • *Telephone - Mobile* • *Union* • *Years of Service* These options are specific to the *Company Directory* org view type. • *Reports Count - Directs/Total* The *Reports Count – Directs/Total* options will show the number of employees that directly report to this individual as well as the total number of subordinate workers that report indirectly to this person. • *Reports Count - Total* The *Reports Count - Total* option will show the total number of subordinate workers that report up through this person. These values are specific to the *Direct-Line Reports* and *Matrix Reports* org view types: • *Career Readiness* * • *Comp Rate* * • *Employee ID* • *Impact of Loss* * • *Organizational Relationship* • *Risk of Leaving* * • *Salary Plan/Grade/Step* * **Note:** * These field elements are considered to be sensitive data. Sensitive data will only display if the employee reports to the signed-in user, hence the user will only see this information for his or her subordinates. When there is an empty position, only these values will display, if selected: • *Dotted-Line To (by Position)* • *Job Family* • *Job Function*

Field or Control	*Description*
	• *Manager Level* • *Reports Count - Directs* • *Reports Count - Directs/Total* • *Reports Count – Total* Attribute number *8* enables you to display either the **Teams** or **Other Teams** link in a node for a person who is part of a matrix team. If the person is not part of a matrix team, the link will not appear in the node. Valid values are: • *Teams* • *Other Teams*
Allow Export	Select this check box to enable the user to export this field content. This option is not available for the *Company Directory Fluid* org view type.

Related Links

Organization Chart Page
Org Chart Page

Managing Matrix Teams as an Administrator

To create and manage matrix teams as an administrator, use the Setup Matrix Types (HRMH_MTRX_TYPE_DEF) and Setup Matrix Teams (HRMH_MATRIX_SETUP) components.

These topics provide an overview of viewing matrix teams and discuss how to manage matrix teams as an administrator.

Pages Used to Manage Matrix Teams as an Administrator

Page Name	*Definition Name*	*Usage*
Setup Matrix Types Page	HRMH_MTRX_TYPE_DEF	Maintain matrix categories and identify the HR actions a member of this type of team can perform.

Page Name	***Definition Name***	***Usage***
Matrix Team Page	HRMH_MATRIX_DEFN	Define matrix team details such as the matrix ID, effective date, status, and description. Create your own or use an existing reporting relationship for the team.
Action Assignment Page	HRMH_TRAN_ASSIGN	Associate Manager Self-Service transactions to a matrix owner or other managers or leads that are part of the matrix reporting relationship.
Assign Transaction Access Page	HRMH_TRAN_LEAD_ASN	Grant matrix owners, other managers, or leads that are part of the matrix reporting relationship, access to Manager Self-Service transactions.
Assign Same Transaction Access Page (see Assign Transaction Access Page)	HRMH_TRN_ASN_MULT	Assign the same transaction access for multiple components to matrix owners and leads. This page setup is the same as the Assign Transaction Access page.

Understanding and Viewing Matrix Teams

You will use the Setup Matrix Types and Setup Matrix Teams components to define your matrix hierarchies and teams. This includes specifying the employee reporting relationships and, optionally, assigning Manager Self-Service transaction permissions to managers and leads among these matrices. The matrix relationships can be automatically built using trees tied to existing direct reports access types (including sub-sets of these trees) or manually. You can also identify business partner teams, HR or business representative, by configuring business partner display options for a matrix team.

Teams or Other Teams

Matrix reports or teams may be available through two means within the Org Chart Viewer or Company Directory pages. A matrix team may be visible to a user in either of the following formats:

- (Classic) A <matrix reports name> folder or tab.

  Appears at the top of the Org Chart Viewer or in the menu drop-down navigation for users associated with a matrix team and granted the appropriate access (see also Understanding the Org Chart Viewer, Folder Tabs, and Page Functionality).

- (Classic) As a **Teams** or **Other Teams** drop-down menu link item.

  These links appear on the Profile page or an Org Chart page node and display the teams associated with a person, where enabled (see also Profile Page, Org Chart Page, and Org Chart Viewer - Teams Page). These teams are viewable to all users.

- (Fluid) As an Other Teams page option in the fluid Company Directory (see also the Other Teams - <Team Name> Page.

Contacts are viewable to all users while only the owner or leads can view the all.

Business Partners

Business partner matrix teams or contact information may be available through various means within the Company Directory, Person Details, or View Teams pages in Fluid. For more information on how to identify a matrix team as a business partner team, see Configuring Business Partners.

- A Business Partner details in the fluid Company Directory shows the contact information for a team (see also the Profile - Business Partners Page or (Smartphone) Profile Page).

  Business partner contacts are viewable to all users while only the owner or leads can view the team.

- A Business Partner page option in fluid Personal Details shows the contact information for a team (see also “Business Partners Page” (PeopleSoft eProfile)).

- A View Teams page for the team owner to view team members (see also View Teams (Summary) Page).

Note: Business partner teams will also appear in the Company Directory pages for the owner under Other Teams.

Granting Access

To have a matrix available in the Company Directory pages, you will need to:

1. Change the matrix ID status to *Active* when creating a matrix team.

   See Matrix Team Page.

2. Select the appropriate **Org View Type** check boxes in the **Display Options** group box to make the matrix public within that particular feature.

   See Matrix Team Page.

3. Select the **Display Matrix Teams** check box on the General Settings page for each of the org view types that should display this matrix ID.

   See Chart and Profile Settings - General Settings Page.

Displaying a Matrix Team Folder for the Owner Versus All Team Members

You will use the **Show in View for Owner Only** check box on the Matrix Team setup page to determine whether all team members *and* the owner have access to the matrix team folder or if just the owner has access to the team folder.

The **Show in View for Owner Only** check box selection determines who has access to a specific matrix team folder:

- *Selected* - Just the owner of the matrix team you are defining can view the team.

- *Deselected* - All team members and the owner of the matrix team you are defining can view the matrix team.

See Matrix Team Page.

Displaying a Person's Team Within the Org View Type Pages to All Users

This table indicates when and where a person's matrix team is listed under the **Teams** or **Other Teams** menu link for all users based on the three **Allow Display Across Features** check box selections on the Matrix Team setup page:

Org View Type Pages That Display a Person's Team To All Users:	***Company Directory*** ***Check Box***	***Direct-Line Reports*** ***Check Box***	***Matrix Reports*** ***Check Box***
Not available on any of the Org Chart Viewer pages			
Company Directory	Selected		
Company Directory Direct-Line Reports.	Selected	Selected	
Company Directory Direct-Line Reports Matrix Reports	Selected	Selected	Selected
Company Directory Matrix Reports	Selected		Selected
Direct-Line Reports		Selected	
Direct-Line Reports Matrix Reports		Selected	Selected
Matrix Reports			Selected

See Matrix Team Page.

Setup Matrix Types Page

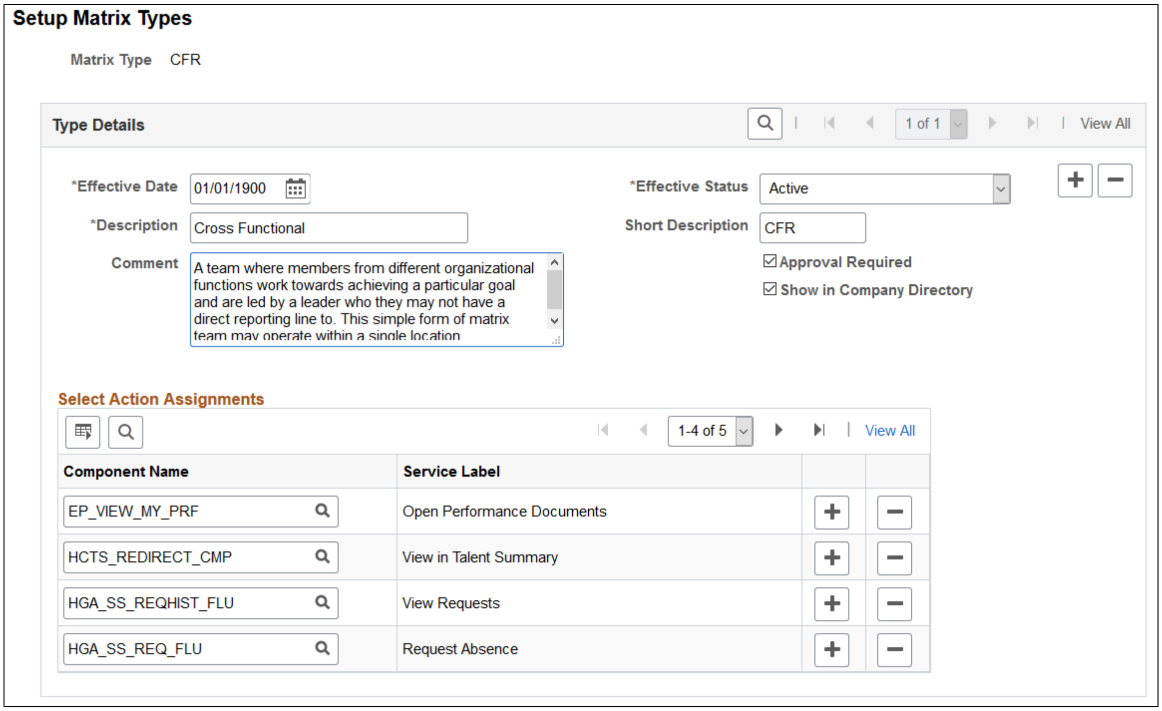
Use the Setup Matrix Types page (HRMH_MTRX_TYPE_DEF) to maintain matrix categories and identify the HR actions a member of this type of team can perform.

Navigation:

- **Set Up HCM** > **Common Definitions** > **Org Chart Viewer** > **Setup Matrix Types** > **Setup Matrix Types**

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the Manage Business Partners Tile, then select **Matrix Types** > **Matrix Types**.

This example illustrates the fields and controls on the Matrix Type page. You can find definitions for the fields and controls later on this page.



The information entered on this page will display to the users when they select the Info icon on the Matrix Team Page.

Field or Control	***Description***
Comment	Enter a comment that can help define the use of this team type.
Approval Required	Select if a manager must give approval for a member to be added to a team. When this is selected, the manager will be notified when the matrix team is saved on the Matrix Team Page.
Show in Company Directory	Select to have this type of team available in the Company Directory and Company Directory Fluid team pages. This is provided as a default value to a team using this type and can be overridden on the Matrix Team Page, **Allow Display Across Features** section.

Select Action Assignments

Enter components that the owner of this type of team will have access.

Matrix Team Page

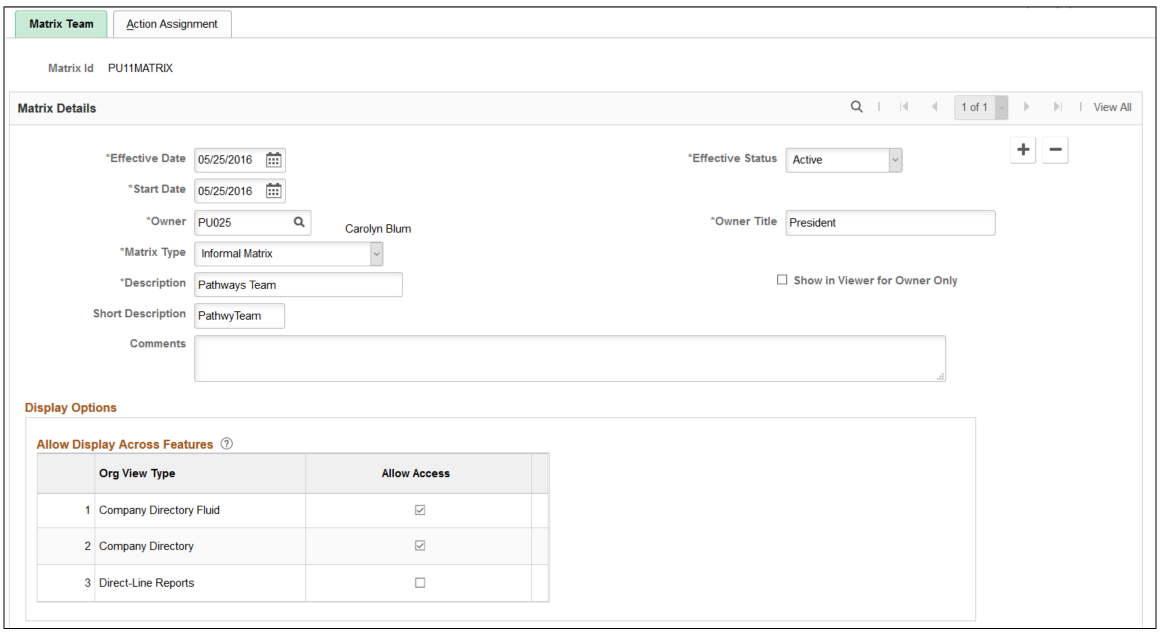
Use the Matrix Team page (HRMH_MATRIX_DEFN) to define matrix team details such as the matrix ID, effective date, status, and description.

Create your own or use an existing reporting relationship for the team.

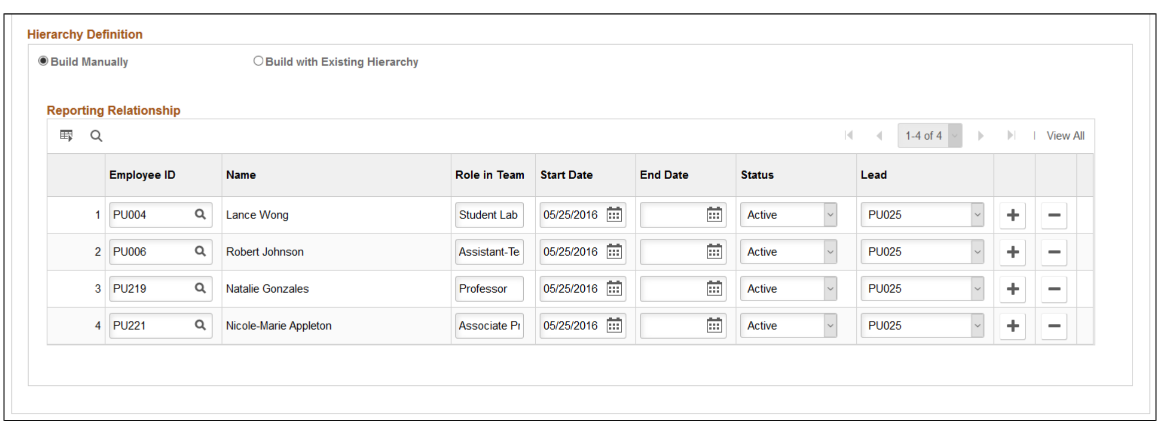
Navigation:

- **Set Up HCM** > **Common Definitions** > **Org Chart Viewer** > **Setup Matrix Teams** > **Matrix Team**
- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the Manage Business Partners Tile, then select **Matrix Teams** > **Matrix Team**.

This example illustrates the fields and controls on the Matrix Team page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Matrix Team page (2 of 2) page. You can find definitions for the fields and controls later on this page.



Matrix Details

Field or Control	*Description*
Start Date	Enter the first effective date of the team.
Owner	Select the employee ID for the person who is the owner of this matrix team. The owner is the top node or person of the matrix team when creating a manual matrix team. When the matrix team is built from an existing hierarchy, the **Owner is Top of Hierarchy** check box must be selected within the **Source (Existing Hierarchy)** section later on this page to have the owner appear in the top node. **Note:** An owner may or may not have access to administer manager self service transactions for all of those on their team through related actions for fluid direct reports. This depends on HR transaction assignment definitions defined on the Setup Matrix Types Page for this matrix type. **Important!** When a team owner has terminated employment with the organization, ensure that all processes are run to removed a person from the direct report, row security, and Company Directory. You will also need to identify the new owner of the matrix team. If you do not update the matrix owner after running these process, the self service pages will continue to show the old owner but will display an error message that this profile is not available.
Owner Title	Displays the job title for the person you entered in the **Owner** field. If this person holds multiple jobs, the system will display the job title of the primary job. If the person is associated with a position, the page will display the position title. You can change the title but this information will not be written back to Job Data or Position Management.
Matrix Type	Identify the type of team you are creating. These values are defined on the Setup Matrix Types Page and determine if a team requires approval to add a member and defines the HR actions the owner can perform. Delivered options are: • *Cross Functional* • *Functional* • *Global Matrix* • *Informational Matrix*

Field or Control	*Description*
Show in Viewer for Owner Only	Select to have this matrix team viewable in the Org Chart Viewer or Company Directory to only the owner of this matrix. Other members of this matrix team will not see this team when this option is selected. See Understanding and Viewing Matrix Teams. When this option is selected for a matrix team that is a business partner team (configured to appear on the Company Directory), the contact information for the business partner will still appear on the Business Partner page of the member, although the team information will not appear under Other Teams. The team will appear under Other Teams for the owner. Deselect this option for a business partner team, and the team information will appear under both the Other Teams (team information) and Business Partner (contact information) pages for the member. **Note:** We recommend that you select this option for business partner teams.

Display Options – Allow Display Across Features

Field or Control	*Description*
Allow Access	Select the org view types where a user can access and view this matrix team from the team pages. By selecting a check box, you make the matrix public to other users. The fields will display the matrix team name on only those org view type pages where you have selected the **Allow Access** check box. Deselect an option to keep the matrix team private within that org view type. **Note:** You must also select the **Display Matrix Teams** check box on the Chart and Profile Setting - General Settings page for each org view type that should display this matrix ID. For example, if *Company Directory* is selected here and the *Company Directory* org view type is set up to view teams (on the Chart and Profile Settings - General Settings page), this matrix team will appear in the **Teams** section on the Company Directory pages for employees associated with this team. You would also be able to search for this matrix team within the Company Directory.

See Understanding and Viewing Matrix Teams.

See Chart and Profile Settings - Profile Content Page.

See Org Chart Content Page.

Hierarchy Definition

Field or Control	*Description*
Build Manually	Select this option to have the **Reporting Relationship** group box display and enter employee names manually into a team matrix.
Build with Existing Hierarchy	Select this option to have the **Source (Existing Hierarchy)** group box display. This will enable you to select an access type or a tree as the basis for your matrix hierarchy. **Note:** Oracle recommends that you use the Group Build feature to create business partner teams. See also "Understanding Group Build" (Application Fundamentals).
Exclude Contingent Workers	Appears only when **Build with Existing Hierarchy** is selected. Select to exclude contingent workers who do not have direct reports. **Note:** To maintain the integrity of the hierarchy, contingent workers with active direct reports are always included in the hierarchy, whether or not this check box is selected.

Reporting Relationship

This group box is available when you select **Build Manually** as a hierarchy definition. Employees that have others reporting to them are considered leads and will be available to you when you assign transactions to managers and leads through the Action Assignment page.

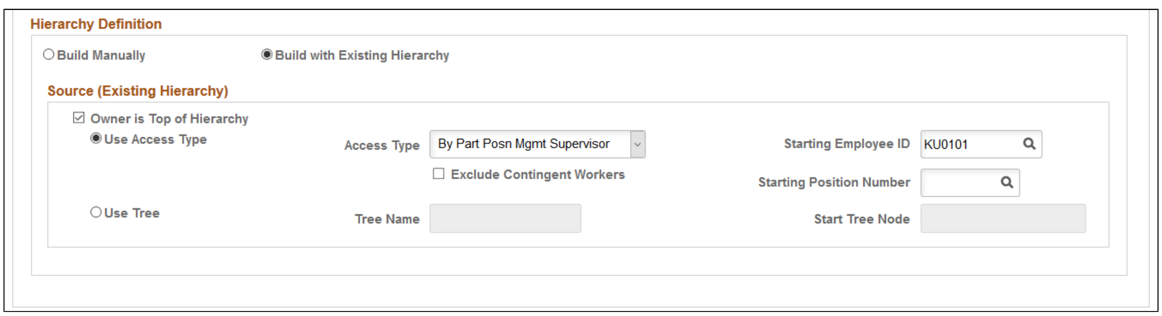
Field or Control	*Description*
Employee ID and **Name**	Enter the employee IDs of those whom you want to include in this matrix team. The name and title will display.
Role in Team	Enter the role this person play on the team.

Field or Control	Description
Start Date, End Date, and **Status**	Identify when this member started with the team and enter a end date, if known. **Note:** You need to run the nightly batch process HR_MTRX_MEMB to have the system check for all members with end date that has become current or where their HR status has become inactive to automatically update their team status to *Inactive*.
Lead	Select the employee ID of the person to whom this person should report to on this team. The people you enter in this field are considered managers or leads because they have others reporting to them. Valid values for this field come from other active employee IDs associated with this matrix team. To have an employee available to you in this field, add the employee ID in the **Employee ID** or the **Owner** field.

Source (Existing Hierarchy)

This group box is available when you select **Build with Existing Hierarchy** as a hierarchy definition.

This example illustrates the fields and controls on the Matrix Team page with Build with Existing Hierarchy selected. You can find definitions for the fields and controls later on this page.



The matrix definition is built dynamically at runtime. Employees that have others reporting to them are considered managers or leads and will be available to you when you assign transactions to managers and leads through the Action Assignment page.

Field or Control	Description
Owner is Top of Hierarchy	Select if the owner of this matrix team should be placed at the top of the hierarchy. This option is selected automatically when you select an access type of By Group ID or By Dept Security Tree.

Field or Control	*Description*
Use Access Type	Select this option to choose an access type as the basis for the matrix hierarchy.
Access Type	This field is available when you select the Use Access Type option. Valid options are: • *By Department Manager ID* • *By Dept Security Tree* • *By Group ID* • *By Part Posn Mgmt Dept Mgr ID* • *By Part Posn Mgmt Supervisor* • *By Reports To Position* • *By Supervisor ID* See Common Terms and Elements Used When Working with the Org Chart Viewer. **Note:** The system issues a warning message when you select and access a type that does not match your Installation table settings, such as Position Management.
Group ID	This field is available when you select *By Group ID* as the access type. Groups are defined using the Group Build feature. A group must be available for manager self service through the group definition and then assigned access to Setup Matrix Teams (HRMH_MATRIX_SETUP) component though Group Build security. See "Understanding Group Build" (Application Fundamentals).
Exclude Contingent Workers	Select to exclude contingent workers who do not have direct reports. **Note:** To maintain the integrity of the hierarchy, contingent workers with active direct reports are always included in the tree, whether or not this check box is selected.
Force Group Refresh	This field is available when you select *By Group ID* as the **Access Type** value and enter a group ID. This enables the user to refresh a group at the matrix level.

Field or Control	***Description***
Starting Employee ID	This field is available when you select the *Use Access Type* option and specify any **Access Type** value except *By Group ID*. The system will display all currently active employees.
Starting Position Number	This field is available when you select any of the Position Management related access types: *By Part Posn Mgmt Dept Mgr ID, By Part Posn Mgmt Supervisor,* or *By Reports To Position.*
Use Tree	Select this option to use an existing tree assigned to the *MATRIX BY JOB* tree structure. See Tree Builder Run Control Page.
Tree Name	Enter the tree name that will serve as the basis for your matrix team. The tree you enter here must use the *MATRIX_BY_JOB* tree structure.
Start Tree Node	Select a node from the tree. The node can be from anywhere within the selected tree.

Note: A matrix will become invalid under these circumstances:
- An employee of a manually built matrix has an inactive status in HR.
- When a starting employee ID is no longer a member of a prebuilt existing hierarchy.
- When a starting employee ID, position number, or tree node is no longer a lead due to an external hierarchy change and that lead is allocated access to transactions via the matrix.
- The transaction defined is no longer available through content services.
- The approval override transaction on the Action Assignment page is no longer associated with the component in Approval Workflows.
- The approval override process definition on the Action Assignment page is no longer associated with the transaction in Approval Workflows and therefore the component.

An owner, manager, or lead may or may not have access to administer manager self service transactions for all of their reports through the **Actions** link in the Org Chart Viewer pages. This depends on transaction assignment definitions.

See Understanding and Viewing Matrix Teams, Assign Transaction Access Page.

Action Assignment Page

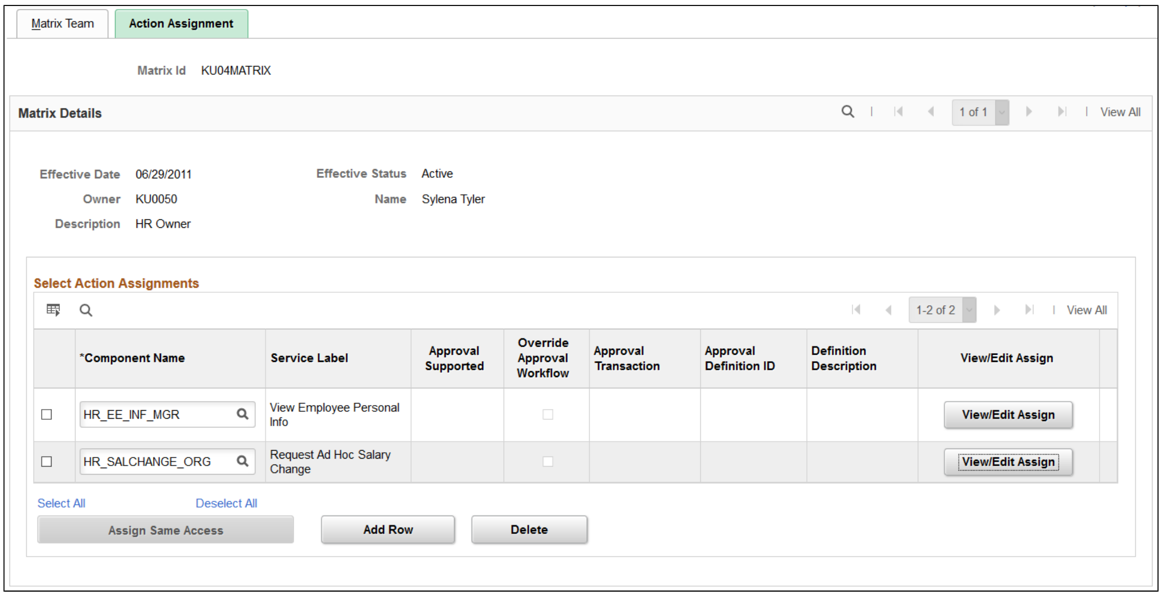
Use the Action Assignments page (HRMH_TRAN_ASSIGN) to grant matrix owners, other managers, or leads that are part of the matrix reporting relationship, access to Manager Self-Service transactions.

Note: Access to the Manager Self-Service transactions can be through related actions or the fluid direct reports employee selection page.

Navigation:

- **Set Up HCM** > **Common Definitions** > **Org Chart Viewer** > **Setup Matrix Teams** > **Action Assignment**
- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the Manage Business Partners Tile, then select **Matrix Teams** > **Action Assignment**.

This example illustrates the fields and controls on the Action Assignment page. You can find definitions for the fields and controls later on this page.



Use this page when a matrix owner or lead within the matrix team should have the capability to administer manager self service transactions for any report.

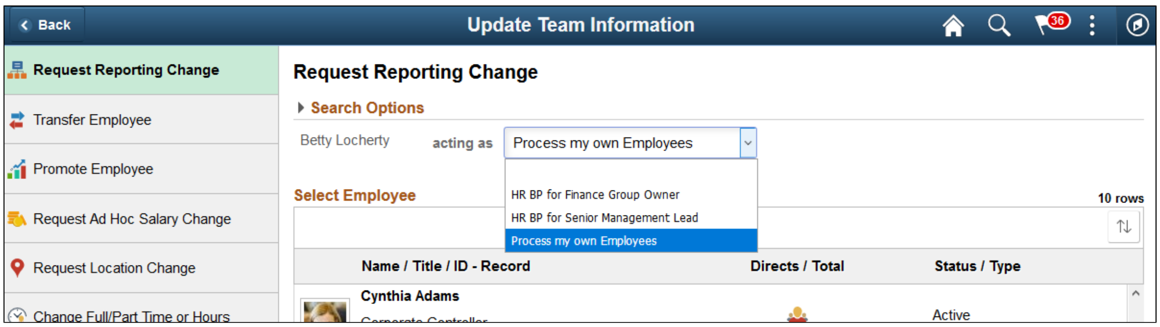
Field or Control	***Description***
Component Name and **Service Label**	Enter the manager self service transaction that should be available to this matrix team. The page displays the name of the transaction.

Field or Control	***Description***
Approval Supported	The field displays Yes when the transaction uses an approval process. These transactions are defined in Approval Workflow as having content service IDs. You can access this information by navigating to **Set Up HCM** > **Common Definitions** > **Approvals** > **Workflow Transactions**. The content service is defined on the Details2 tab to the approval transaction in the Org Viewer Service ID column. Components that are delivered with approvals are: • *GP_ABS_MGRSS_REQ – Request Absence* • *HR_MGR_REPORT_CHNG – Request Reporting Change* • *HR_PROMOTE_MGR – Promote Employee* • *HR_TRANSFER_MGR – Transfer Employee* • *JPM_PERS_PTSEL_MGR – Current Team Profiles* See “Defining the Setup Process Definitions Component” (Approval Framework).
Override Approval Workflow	This field is available when the transaction is associated with more than one process definition. **Note:** For a complete list of delivered transaction registry definitions, access the Register Transactions component by navigating to **Set Up HCM** > **Common Definitions** > **Approvals** > **Approvals Setup Center** > **Register Transactions**. For more information about approvals, see “Understanding the Approval Framework Feature” (Approval Framework).
Approval Transaction, Approval Definition ID, and **Definition Description**	Displays the approval transaction associated with this component, if applicable. The component associated with this transaction is where requests are approved or denied. Define approval processes by navigating to **Set Up HCM** > **Common Definitions** > **Approvals** > **Approval Process Setup.** When you select the **Override Approval Workflow** check box, this field becomes available for you to select another approval transaction.
View/Edit Assign	Click the button to access the Assign Transaction Access page and assign transaction access to the owner or leads within the matrix team.
Assign Same Access	Select multiple components and click this button to access the Assign Same Transaction Access page.

Viewing Direct Reports and Authorized Matrix Teams in Fluid Manager Self-Service

The PeopleSoft Fluid Manager Self-Service transactional pages enable managers to view or update information for their direct reports and for teams to which they have been granted action assignment access. When managers accesses a fluid employee selection search page for a transaction in which they are authorized to perform tasks for direct reports and a matrix team, the page will display the '**acting as**' field.

This example illustrates the Update Team Information page showing the acting as field expanded.



Field or Control	Description
acting as	This field is available when you have access to direct reports and teams for a transaction. Select *Process my own Employees* to view your direct reports, or select a team name to which you are an authorized owner or lead. Team names are followed by either *Owner* or *Lead*, depending on your role in the team. Owners and leads must be granted access to the transaction for the team to appear in this list (see Assign Transaction Access Page).

Related Links

Understanding and Viewing Matrix Teams

Assign Transaction Access Page

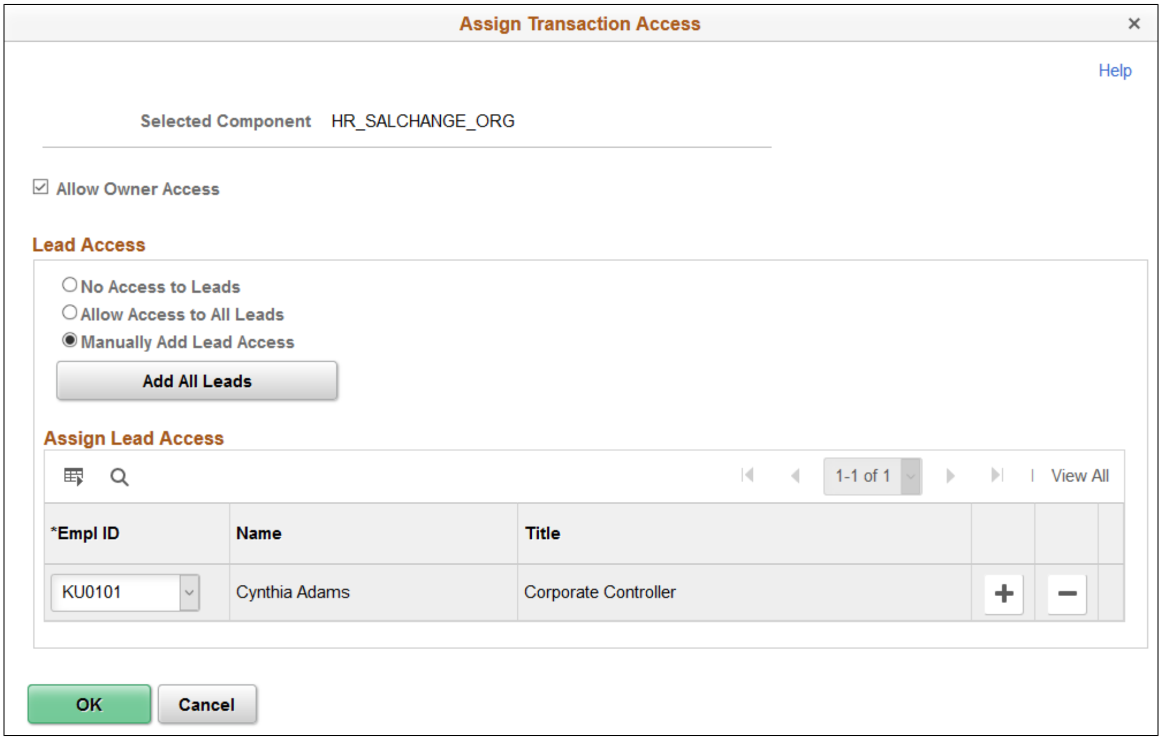
Use the Assign Transaction Access page (HRMH_TRAN_LEAD_ASN) to assign transaction access to matrix owners and leads.

Note: The Assign Same Transaction Access page (HRMH_TRN_ASN_MULT) functions the same as this page.

Navigation:

Click the **View/Edit Assign** button on the Action Assignments page.

This example illustrates the fields and controls on the Assign Transaction Access page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Allow Owner Access	Select to allow the transaction to be assigned to the owner of this matrix team.
Lead Access	Identify matrix team leads to which you want to assign transaction access. Options are: • No Access to Leads - Does not allow leads to have transaction assignments. • Allow Access to All Leads - Allows all leads in this matrix to have transaction assignments. • Manually Add Lead Access - This option enables you to manually select leads from this matrix for which you want to assign transactions.
Add All Leads	Click to automatically list all leads as having access to this transaction. This button is available when you select **Manually Add Lead Access.** Use the **Delete** button to remove those who should not be on this list.
Empl ID	Enter the leads that should have access to this transaction. Valid values come from the Matrix Team page for this matrix and are employees that have others reporting to them.

Note: The Assign Same Transaction Access page setup is identical to this page but enables you to assign access to multiple component transactions simultaneously. You access the Assign Same Transaction Access page by selecting multiple components on the Action Assignment page and clicking Assign Same Access.

Related Links

Understanding and Viewing Matrix Teams

Managing Dotted Line Relationships as an Administrator

Dotted line relationships are typically between two individuals, where one individual is a dotted line report to another individual, for purposes such as mentoring, providing a service or function due to a specialized role, or cross team collaboration. The dotted line manager may be able to assign some tasks to the employee and have some authority over other functions such as performance evaluations, career paths, timesheets, and absence approvals.

The following videos provide a demonstration of features and how to use Dotted Line Relationships:

Video: Image Highlights, PeopleSoft HCM Update Image 23: Dotted Line Reporting for HR

Video: PeopleSoft Dotted Line Relationship Management: HR Administration page

These topics discuss how an administrator creates or deletes dotted line relationships.

Related Links

Profile - Manage Dotted Line Page

Pages Used to Manage Dotted Line Relationships as an Administrator

Page Name	***Definition Name***	***Usage***
Dotted Line Page	HR_DTLN_FL	View a list of dotted line relationships already created in the system, and create or delete dotted line relationships.
Add Dotted Line Page	HR_DTLN_ADD_SCF	Create dotted line relationships.
(Smartphone) View Dotted Line Details Page	HR_DTLN_VIEW_SCF	View additional details about a dotted line relationship or delete a dotted line relationship using a smartphone.

Accessing the Dotted Line Pages

As delivered, you can access the Dotted Line pages through the:

- HR Administration navigation collection

Select *Workforce Administrator* from the fluid banner, Then select the HR Administration tile. It will appear as one of the page tab options in the left panel. See Managing HR Administration Tasks as an Administrator Using Fluid.

Note: The HR administration navigation collection uses PeopleTools 8.55 or higher. If you are using Dotted Line on PeopleTools 8.54, you will need to add the Dotted Line tile to the *Workforce Administrator* homepage.

- Dotted Line tile

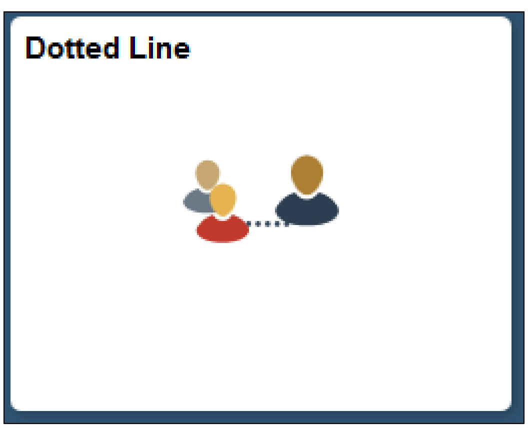
Note: You will need to add the tile to a fluid home page to use this option.

Adding the Dotted Line Tile to a Fluid Home Page

As delivered, you access the Dotted Line pages by accessing the HR Administration navigation collection. However, you can also add the Dotted Line tile to a Fluid home page to quickly access the dotted line pages as an administrator. To do this:

1. From the PeopleSoft Fluid User Interface banner, click the **Actions List** icon in the top right corner.
2. Select **Personalize Homepage**.
3. On the Personalize Homepage page, select the homepage in the left page to indicate where you want to add the Dotted Line tile (for example, Manager Self Service).
4. Click the **Add Tile** button.
5. On the Add Tile page, select Workforce Administrator, then Dotted Line.
6. Save.

This example illustrates the Dotted Line tile.



To remove the tile from the homepage, from the Personalize Homepage page, click the Delete Dotted Line icon (red X) in the top right corner of the tile and save.

Dotted Line Page

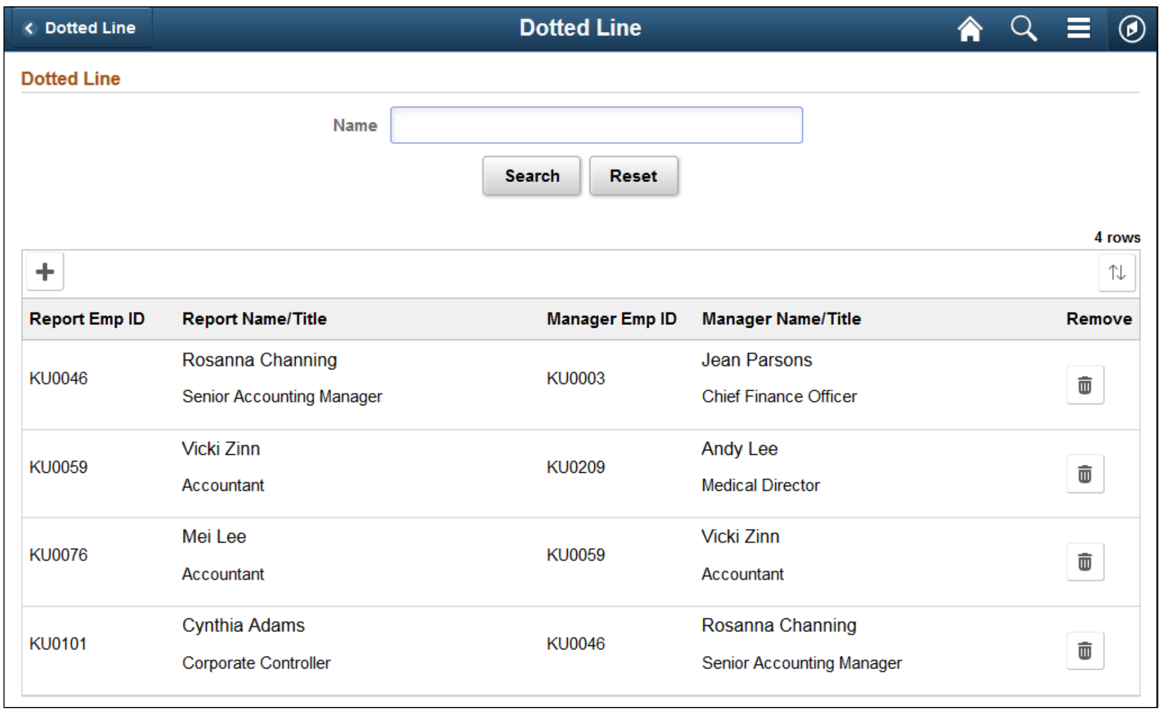
Use the Dotted Line page (HR_DTLN_FL) to view a list of dotted line relationships already created in the system, and create or delete dotted line relationships.

Navigation:

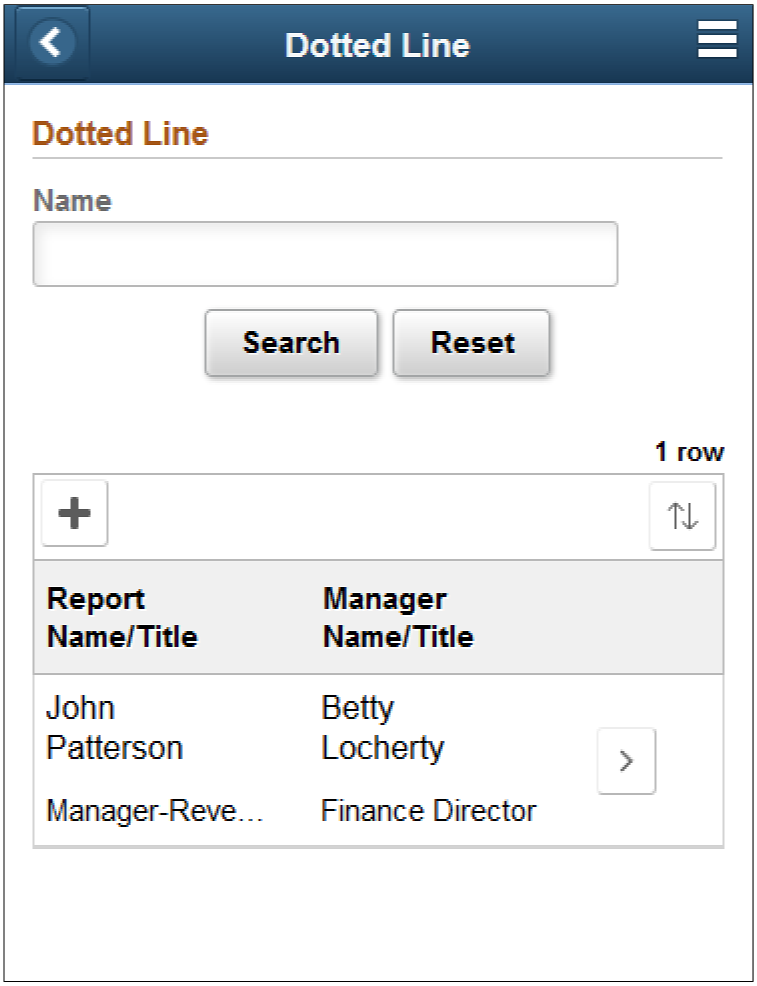
From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the HR Administration Tile, then select the Dotted Line page item tab.

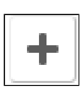
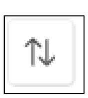
You can add the Dotted Line tile, through personalization, to a system-delivered home page or a home page that you create.

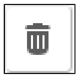
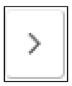
This example illustrates the fields and controls on the Dotted Line page for the tablet.



This example illustrates the fields and controls on the Dotted Line page for the smartphone.



Field or Control	***Description***
Name and **Search**	Enter search criterion in the **Name** field and click **Search** to narrow your list of dotted line relationships. The process will look for any people with a dotted line relationship that match the name criterion, i.e. the report name and the manager name.
Reset	Click this button to clear the Name field and reset the page to show all dotted line relationships.
 or **Add a Dotted Line Relationship** buttons	Click the add button to access the Add Dotted Line Page and create a new dotted line relationship.
 Sort button	Click this button to access the Sort page where you can choose to sort the list by any of the column headings. Toggle between ascending and descending order by selecting the sort item name again. The **Sort** icon appears green when a sort has been applied to your page.

Field or Control	***Description***
 Remove Dotted Line Relationship button	(Tablet) Click this button to remove a dotted line relationship. The system will present you with a secondary page where you will confirm that you want to perform the deletion. (Smartphone) To delete a relationship using a small form factor device, access the (Smartphone) View Dotted Line Details Page and click the **Remove** button. **Note:** When adding or removing a dotted line relationship, the system will send an email notification to the dotted line report and dotted line manager, notifying them that a dotted line relationship was either created or removed. The system will also copy the direct line manager of these individuals on the email.
 View Details button	(Smartphone) Click this button to access the (Smartphone) View Dotted Line Details Page and view additional details about a relationship or delete a relationship.

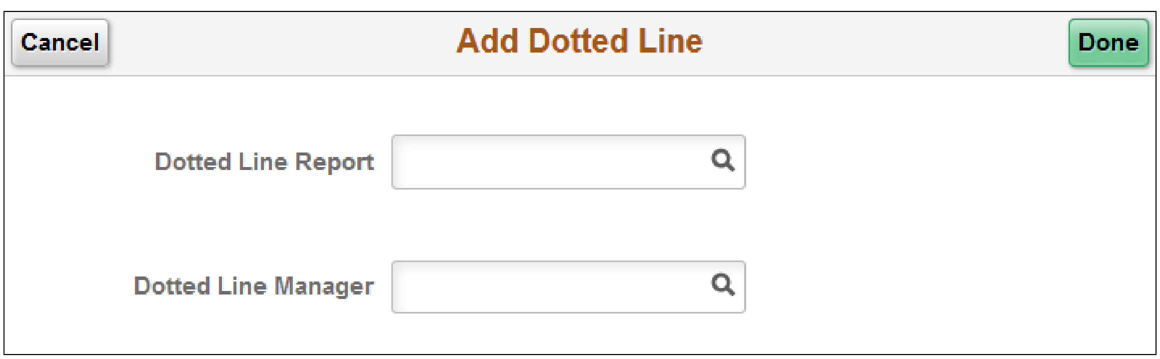
Add Dotted Line Page

Use the Add Dotted Line page (HR_DTLN_ADD_SCF) to create dotted line relationships.

Navigation:

Click the **Add** button on the Dotted Line Page

This example illustrates the fields and controls on the Add Dotted Line page.



Use this page to enter the dotted line reporting relationship between two people. In order to create the relationship, consider the following:

- The system will not allow you to enter a dotted line relationship where a direct reporting structure is already in place. For example, a manager cannot be assigned as a dotted line manager to one of his or her own direct line reports.
- A dotted line report and dotted line manager cannot be the same person.
- You cannot enter duplicate dotted line relationships.

Field or Control	***Description***
Cancel	Click the button to cancel your changes and return to the Dotted Line Page.
Done	Click this button to save your information. **Note:** When adding or removing a dotted line relationship, the system will send an email notification to the dotted line report and dotted line manager, notifying them that a dotted line relationship was either created or removed. The system will also copy the direct line manager of these individuals on the email.
Dotted Line Report	Enter the name of the person that will be a dotted line report to the individual you list in the **Dotted Line Manager** field on this page.
Dotted Line Manager	Enter the name of the person who will be the dotted line report manager to the individual listed in the **Dotted Line Report** field on this page.

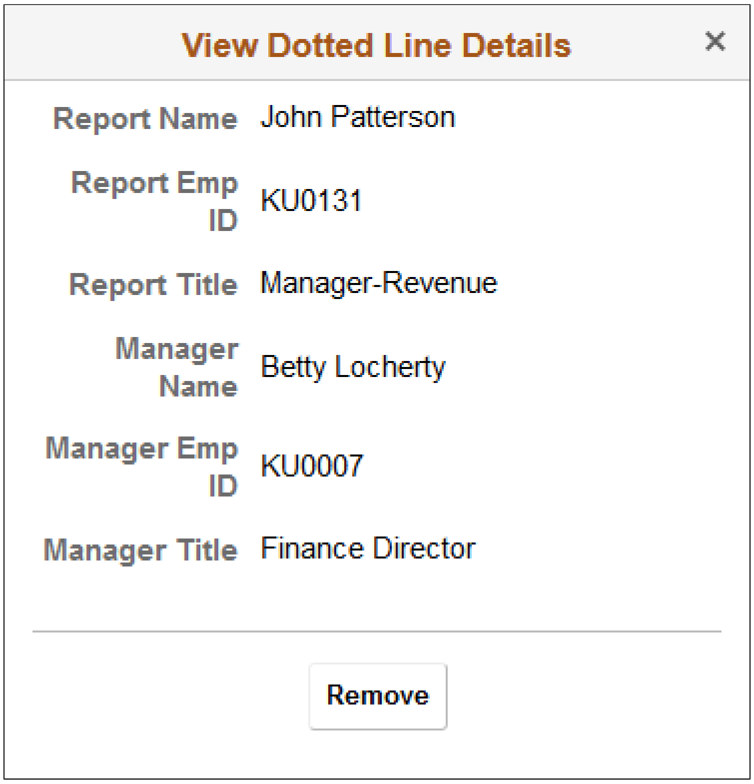
(Smartphone) View Dotted Line Details Page

Use the View Dotted Line Details page (HR_DTLN_VIEW_SCF) to view additional details about a dotted line relationship or delete a dotted line relationship using a smartphone.

Navigation:

Click the **View Details** button on the Dotted Line Page when using a smartphone.

This example illustrates the fields and controls on the View Dotted Line Details page for the smartphone.



Field or Control	*Description*
Remove	Click this button to delete a dotted line relationship. **Note:** When removing a dotted line relationship, the system will send an email notification to the dotted line report and dotted line manager, notifying them that a dotted line relationship was either created or removed. The system will also copy the direct line manager of these individuals on the email.

Chapter 4

Setting Up Country-Specific Tables

Understanding Country-Specific Table Setup

Once you've set up the tables that you'll use to administer your core workforce functionality in PeopleSoft Human Resources, you may also need to set up additional tables to manage the Administer Workforce business process for specific countries.

You need to set up only the tables that are relevant to your organization's business needs.

Related Links

Defining Personnel Actions and Reasons

(FRA) Setting Up French Workforce Tables

To set up the French workforce tables, use the APE Table (APE_TABLE_FRA), the INSEE Table (INSEE_TABLE_FRA), the External Variables (EXTERNAL_VARIABLES), URSSAF Table (URSSAF_TABLE_FRA), FRA CPAM Table (CPAM_TABLE_FRA), FRA CRAM table (CRAM_TBL_FRA), Hour Type table (HOUR_TYPE_TABLE), and Occupational Illness Tbl - FRA (OCC_ILLNESS_FRA) components.

These topics provide an overview of maintaining French social security tracking codes and discuss how to set up French workforce tables.

Pages Used to Set Up French Workforce Tables

Page Name	*Definition Name*	*Usage*
APE Table Page	APE_INDSTRY_CD_FRA	Maintain APE codes for your French organization. APE codes are used to classify the type of industry (such as software, banking, and insurance) that a company represents. APE codes are a normalized set of codes that are required by law and are used on Training Report 2483 (TRN029).
INSEE Table Page	INSEE_TABLE_FRA	Maintain INSEE codes for your French organization.

Page Name	**Definition Name**	**Usage**
Workforce Data FRA - External Variables Page	EXT_PARM_CD_FRA	Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.
URSSAF Table Page	URSSAF_TABLE_FRA	Set up URSSAF codes. The URSSAF is a French administration that collects the worker and employer contributions for Social Security. This table stores the codes for the local URSSAF offices.
CPAM Table Page	CPAM_TABLE	Modify or add a CPAM ID to your human resources system.
CRAM Table Page	CRAM_TBL	Modify or add a CRAM code to your human resources system.
Hours Type Page	HOURS_TYPE_FRA	Define hours type codes that you'll use to track job hours information for French workers.
Occupational Illness Tbl - FRA Page	OCC_ILLNESS_FRA	Enter French occupational illness codes.

Understanding French Social Security Tracking Code Maintenance

In France, CPAMs are the local social security offices that manage health coverage for French workers. The French government establishes and regulates CPAMs. If you're managing a French workforce, you'll need to identify and track the CPAM offices that impact your enterprise.

The CRAM is the regional social security body that oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for vocational or personal injuries.

Use the French setup tables to maintain Caisse Primaire d'Assurance Maladie (CPAM) and Caisse Regionale d'Assurance Maladie (CRAM) codes for compliance with French social insurance regulations.

Track and report on occupational injuries for French workers using the Monitor Health and Safety business process in PeopleSoft Human Resources.

Related Links

“Understanding Health and Safety Incidents” (PeopleSoft Human Resources Monitor Health and Safety)

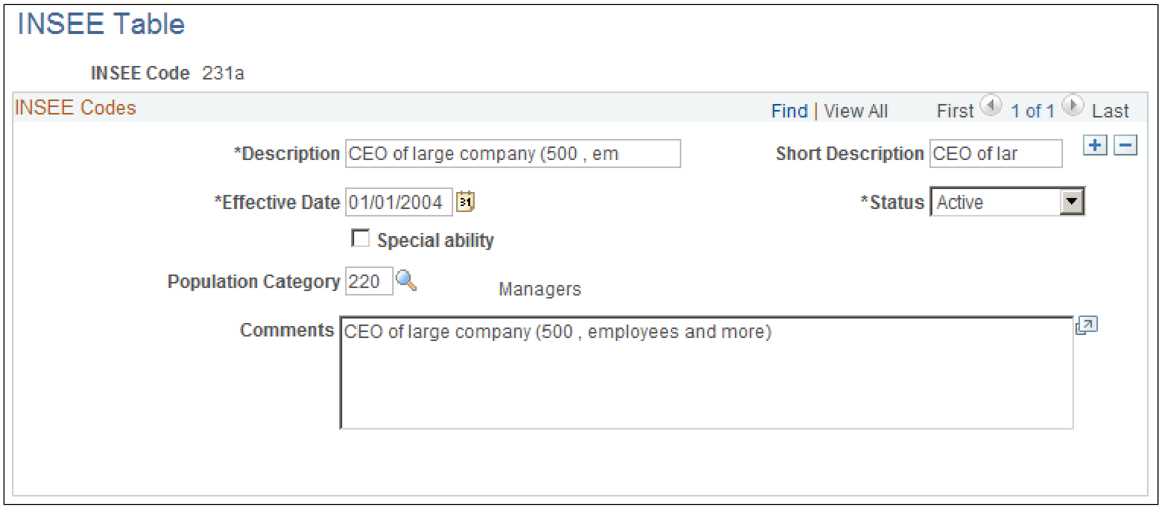
INSEE Table Page

Use the INSEE Table page (INSEE_TABLE_FRA) to maintain INSEE codes for your French organization.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data FRA > INSEE Table

This example illustrates the fields and controls on the INSEE Table page. You can find definitions for the fields and controls later on this page.



The system displays the description that you enter for this code on pages or reports in PeopleSoft Human Resources that reference the INSEE code.

These values are set by the INSEE and classify job codes. Link INSEE codes to job codes that are used in French organizations on the Job Data - Evaluation Criteria page.

Field or Control	***Description***
Special ability	Select if this INSEE code represents a job that requires a special ability. An worker who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.
Population Category	Select the population category associated with this INSEE code. Population codes are used in the definition of contingency contracts to identify the population covered by a contract. Population codes are also used by the DUCS reporting in PeopleSoft Global Payroll for France.

Related Links

“Classifying Jobs” (Application Fundamentals)

“Setting Up French Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)

Workforce Data FRA - External Variables Page

Use the External Variables page (EXT_PARM_CD_FRA) to enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Workforce Data FRA** > **External Variables**
- **Set Up HCM** > **Product Related** > **Workforce Monitoring** > **Regulatory Requirements FRA** > **External Variables**

This example illustrates the fields and controls on the External Variables page. You can find definitions for the fields and controls later on this page.

The values that you enter act as a reference for salary and payroll processing in PeopleSoft Human Resources.

Leg&Reg Report Parameters (legislative and regulatory report parameters)

Field or Control	***Description***
Minimum Salary, Retail Price Index, and **Minimum Salary Guaranteed**	Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.
Disability Report Rate	Prior to launching the Disability report (DIS001), enter a disability report rate. The rate is set by the French government, and the current rate is 6 percent (a field value of *0,06*). The disability report rate is set up in the External Variables Table.

Social Security Ceiling

These ceiling values are determined every year by the French Social Security Administration; the values that you enter are the ceiling values that define different income brackets for French workers. They are also used as a reference for payroll calculations for French workers because many types of Social Security contributions are calculated based on the Social Security income bracket into which an worker's salary falls.

For example, if you enter the following Social Security ceilings for **Social Security Ceiling A, B,** and **C,** and the tax rates for each bracket of income are as shown:

	Bracket A	***Bracket B***	***Bracket C***	***Above***
Ceiling	2279 EUR	9116 EUR	18233 EUR	
Tax Rate	10%	15%	18%	20%

Then an worker whose salary is 31000 EUR per month, based on this Social Security and tax rate scenario, is required to pay the following Social Security premium:

(2,279 × 10%) + (9,116 × 15%) + (18,233 × 18%) + (1,372 × 20%)

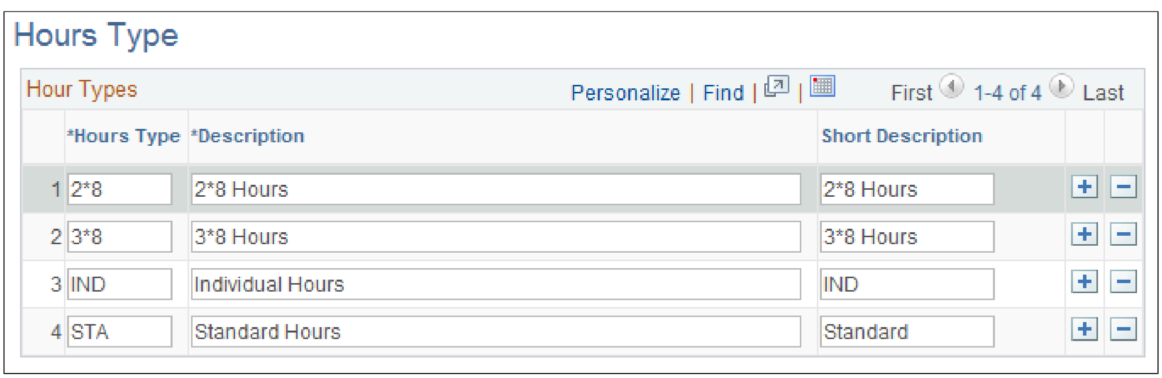
Hours Type Page

Use the Hours Type page (HOURS_TYPE_FRA) to define hours type codes that you'll use to track job hours information for French workers.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data FRA** > **Hours Type** > **Hours Type**

This example illustrates the fields and controls on the Hours Type page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Hours Type	Enter the hours type code you are defining. Add rows to define as many hours type codes as needed.

Hours Type	***Description***
3*8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can go on round the clock. The production workers are split into three groups —each group is working one after the other, eight hours a day. Every month, for example, the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints in their personal life, those workers are often paid a shift bonus.
2*8	Works the same way as the 3*8 option, but indicates that there are two work shifts as opposed to three.
STA	Indicates that the work hours follow a regular pattern using the job's standard hours as indicated on the Job Information page.
IND	Indicate that the worker's hours follow an individualized pattern that is different from the company's default standard hours. Indicate this amount in the Standard Hours field on the Job Information page. This field is used by the French Employee report (indicator 413 of the Employee Survey for the Trade/Services industry).

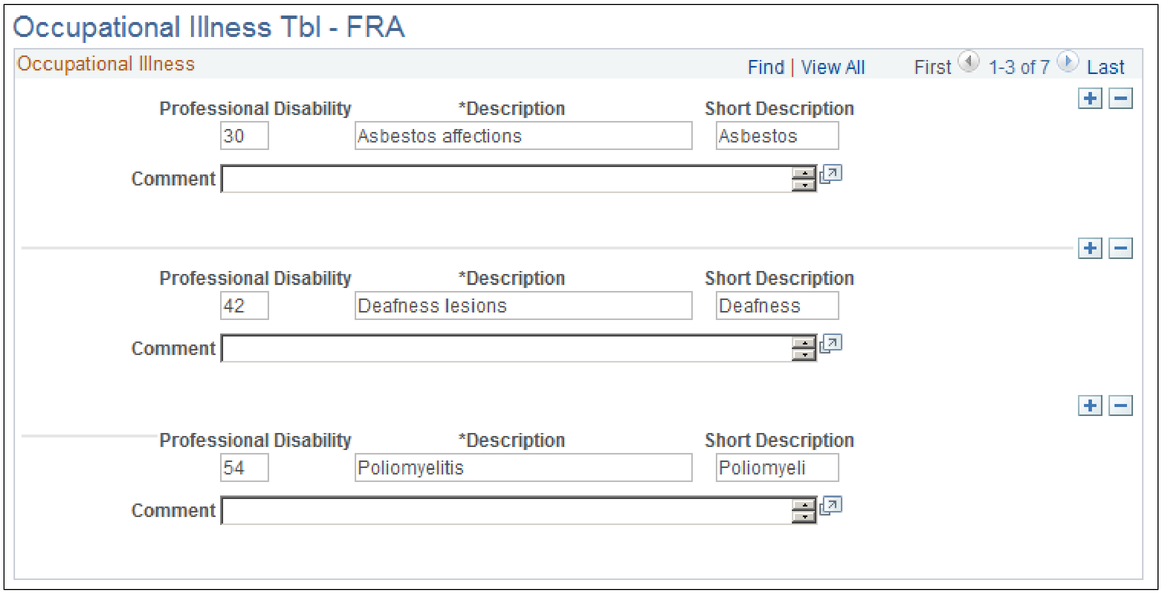
Occupational Illness Tbl - FRA Page

Use the Occupational Illness Tbl - FRA page (OCC_ILLNESS_FRA) to enter French occupational illness codes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Monitoring** > **Health and Safety** > **Occupational Illness Tbl - FRA** > **Occupational Illness Tbl - FRA**

This example illustrates the fields and controls on the Occupational Illness Tbl - FRA page. You can find definitions for the fields and controls later on this page.



Use this page to define occupational illness categories for French workers. Use the categories when you enter information on the Disability page.

Note: The Occupational Illness Tbl - FRA table (OCC_ILLNESS_FRA) is used as a prompt table on the **Prof. Dis** (Professional Disease) field for the Disability page. While there is another Occupation Illness table (OCC_ILLNESS_TBL) used in the Monitor Health and Safety business process, they aren't the same page. If you're entering information about disabilities for French employees on the French Disability page, you must complete this table.

Field or Control	***Description***
Professional Disability	Enter codes for the occupational illnesses that you want to track in your system.

(DEU) Setting Up German Workforce Tables

To set up the German workforce tables, use the Accident Insurance table (ACCDT_INS_TABLE), BA Cd table (BA_CD_TABLE), Function Code Table (FUNCTION_CD_TBL), Nation Duvo (NATION_DUVO_TABLE), Industrial Inspection (INDUST_INSP_GER), and SI Unit (SI_UNIT_GER) components.

These topics provide an overview of social insurance in Germany and discuss how to set up German workforce tables.

Pages Used to Set Up German Workforce Tables

Page Name	***Definition Name***	***Usage***
Accident Insurance - Accident Insurance Table Page	ACCDT_INS_TABLE	Define accident insurance codes for German employees.
Accident Insurance Address Page	ACCDT_INS2_TABLE	Enter address information for this accident insurance provider.
Accident Insurance Upload Page	HRDE_AI_UPLOAD	Upload UVGT and UVSD files to use.
BA Codes (Bundesanstalt fur Arbeit Codes) Page	BA_CD_TABLE	Add or update Bundesanstalt fur Arbeit job codes. PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office (Bundesanstalt fur Arbeit) in Verzeichnis der Berufsbezeichnungen and are required on reports to the German Federal Labor Office.
Function Code Page	FUNCTION_CD_TABLE	Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes that you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce.
Nation Duvo Page	NATION_DUVO_TABLE	Add or update nation DEUEV information.
Industrial Inspection Page	INDUST_INSP_GER	Set up German industrial inspection codes that you associate with locations in your organization. Industrial inspection codes are not effective-dated and have no status.
Social Insurance Unit Page	SI_UNIT_GER	Set up German social insurance unit codes that you associate with locations in your organization.

Understanding Accident Insurance

Accident insurance in Germany is maintained and administered by private organizations (Berufsgenossenschaften) that act as employer's liability insurance associations. Employers pay out a certain amount in the form of premiums to these associations, who administer and pay out funds to workers injured on the job. To manage the amount your company contributes to the fund, set up information regarding accident insurance codes and accident insurance hazard codes. The insurance associations usually determine these codes.

To determine your premium, track the number of employees who belong to a hazard class. This number is multiplied by a hazard factor, and the results are supplied to the social insurance provider, which determines the required premium for your organization. These contribution amounts are based on the number of organizations that the provider serves; for example, if one of the companies in the group goes bankrupt, the other member companies may have to pay higher premiums.

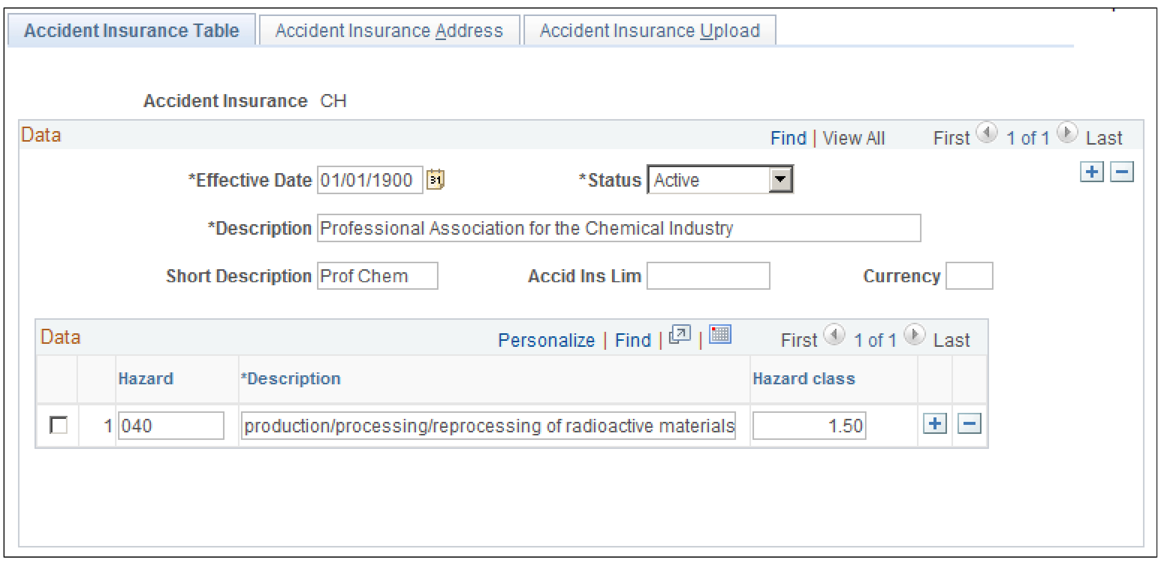
Accident Insurance - Accident Insurance Table Page

Use the Accident Insurance Table page (ACCDT_INS_TABLE) to define accident insurance codes for German employees.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data DEU** > **Accident Insurance** > **Accident Insurance Table**

This example illustrates the fields and controls on the Accident Insurance - Accident Insurance Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Hazard	Enter the code for the hazard type. **Note:** German hazard codes are regulated and standardized by the German government.
Hazard Class	Enter the class, or degree, of the covered hazard.

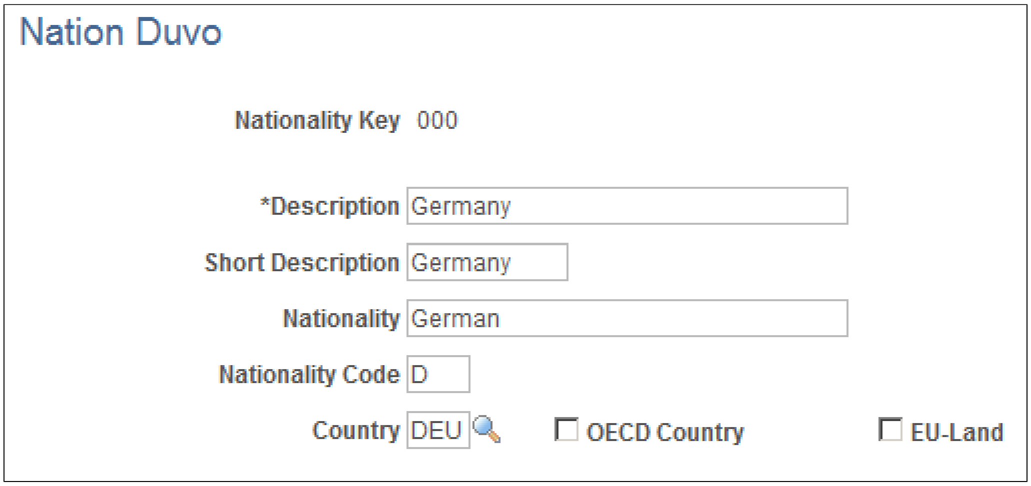
Nation Duvo Page

Use the Nation Duvo page (NATION_DUVO_TABLE) to add or update nation DEUEV information.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data DEU** > **Nation Duvo** > **Nation Duvo**

This example illustrates the fields and controls on the Nation Duvo page. You can find definitions for the fields and controls later on this page.



The Nation DEUEV table is maintained by PeopleSoft and stores nationality codes specified by the German DEUEV Directive that regulates how data is to be provided to the German social insurance administration by companies doing business in Germany. Using these codes is required for compliance with the German DEUEV (data transmission/transfer) Directive.

Note: The nation codes on the Nation DEUEV table are different from the country codes on the Country table. Nation DEUEV codes are specific to the German DEUEV Directive and are not based on ISO.

Note: The DEUEV Directive specifies the nationality key for each DEUEV country. Don't change it here unless the DEUEV Directive changes the nationality key.

Field or Control	***Description***
Nationality	Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is *Dutch.*
Nationality Code	The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.
Country	Indicate an ISO country code to be associated with the DEUEV Directive nationality key.

Field or Control	***Description***
OECD Country (Organization of Economic Cooperation and Development country)	Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies. **Note:** There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.
EU-Land (European Union country)	Select to indicate this is European Union country. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

Note: Nationality keys are attached to an employee's job data on the Job Data Identity/Diversity page. If you're entering information for German workers, the system prompts for the worker's nationality code using the DEUEV nations on the Nation DEUEV table.

(ITA) Setting Up Italian Workforce Tables

To set up the Italian Workforce tables, use the ITA C.I.A. table (CIA_TBL_ITA), Cities table (CITY_TABLE_ITA), ITA INAIL table (INAIL_TBL_ITA), ITA INPDAI table (INPDAI_TBL_ITA), INPS Site (INPS_SITE_ITA), INPS Codes (INPS_TBL_ITA), ITA PREV table (PREV_TBL_ITA), Company Codes (COMP_CD_ITA), Company/Estab Codes (COMP_ESTAB_CD_ITA), IT Country FCode (COUNTRY_TABLE_ITA), Seniority Notification Periods (SENIORIT_NOTIF_ITA), Turnover Action (TRV_ACTREAS_ITA), and Productive Unit (UNITA_PROD_TBL) components.

These topics discuss setting up Italian workforce tables.

Pages Used to Set Up Italian Workforce Tables

Page Name	***Definition Name***	***Usage***
C.I.A. Page	CIA_TBL_ITA	Enter company integrative contract information.

Page Name	***Definition Name***	***Usage***
Cities Page	CITY_TABLE_ITA	Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the Ministero delle Finanze website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process.
INAIL Codes Page	INAIL_TBL_ITA	Define the INAIL (Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro) position code and rate for INAIL contribution.
INPDAI Codes Page	INPDAI_TBL_ITA	Define the INPDAI (Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali) position codes for pension funds. The INPDAI codes are used for historical data only. The INPDAI is no longer a legal body in Italy and these codes are no longer required.
INPS SitesPage	INPS_SITE_ITA	Set up INPS (Istituto Nazionale per la Previdenza Sociale) site codes. Link INPS sites to INPS codes on the INPS Codes page.
INPS Codes Page	INPS_TBL_ITA	Define INPS data for social security contributions and information needed for social security reporting (DM10).
PREV Codes Page	PREV_TBL_ITA	Define PREVINDAI codes, descriptions, and PREVINDAI position codes.
Company Codes - INPS Codes Page	COMP_INPS_ITA	Link the company with INPS codes.
Company Codes - INAIL Codes Page	COMP_INAIL_ITA	Link the company with INAIL codes.
Company Codes - INPDAI Codes Page	COMP_INPDAI_ITA	Link the company with INPDAI codes.
Company Codes - PREV Codes Page	COMP_PREV_ITA	Link the company with PREV codes.
Company Codes - C.I.A. Codes Page	COMP_CIA_ITA	Link the company with C.I.A. codes.

Page Name	***Definition Name***	***Usage***
Company/Estab Codes - INPS Codes Page	EST_INPS_ITA	Link the company and establishment with INPS codes.
Company/Estab Codes - INAIL Codes Page	EST_INAIL_ITA	Link the company and establishment with INAIL codes.
Company/Estab Codes - INPDAI Codes Page	EST_INPDAI_ITA	Link the company and establishment with INPDAI codes.
Company/Estab Codes - PREV Codes Page	EST_PREV_ITA	Link the company and establishment with PREV codes.
Company/Estab Codes - CIA Codes Page	EST_CIA_ITA	Link the company and establishment with C.I.A. (Contratto Intergrativo Aziendale) codes.
Country Fiscal Codes Page	COUNTRY_DEFN_ITA	Define the city fiscal code.
Seniority Notification Periods Page	SENIORIT_NOTIF_ITA	Define seniority termination notification periods for employment categories.
Turnover Action Page	TRV_ACT_REAS_ITA	Set up action reasons for job turnover actions.
Productive Unit Page	UNITA_PROD_TBL	Define production units based on your company's agreements with the unions.

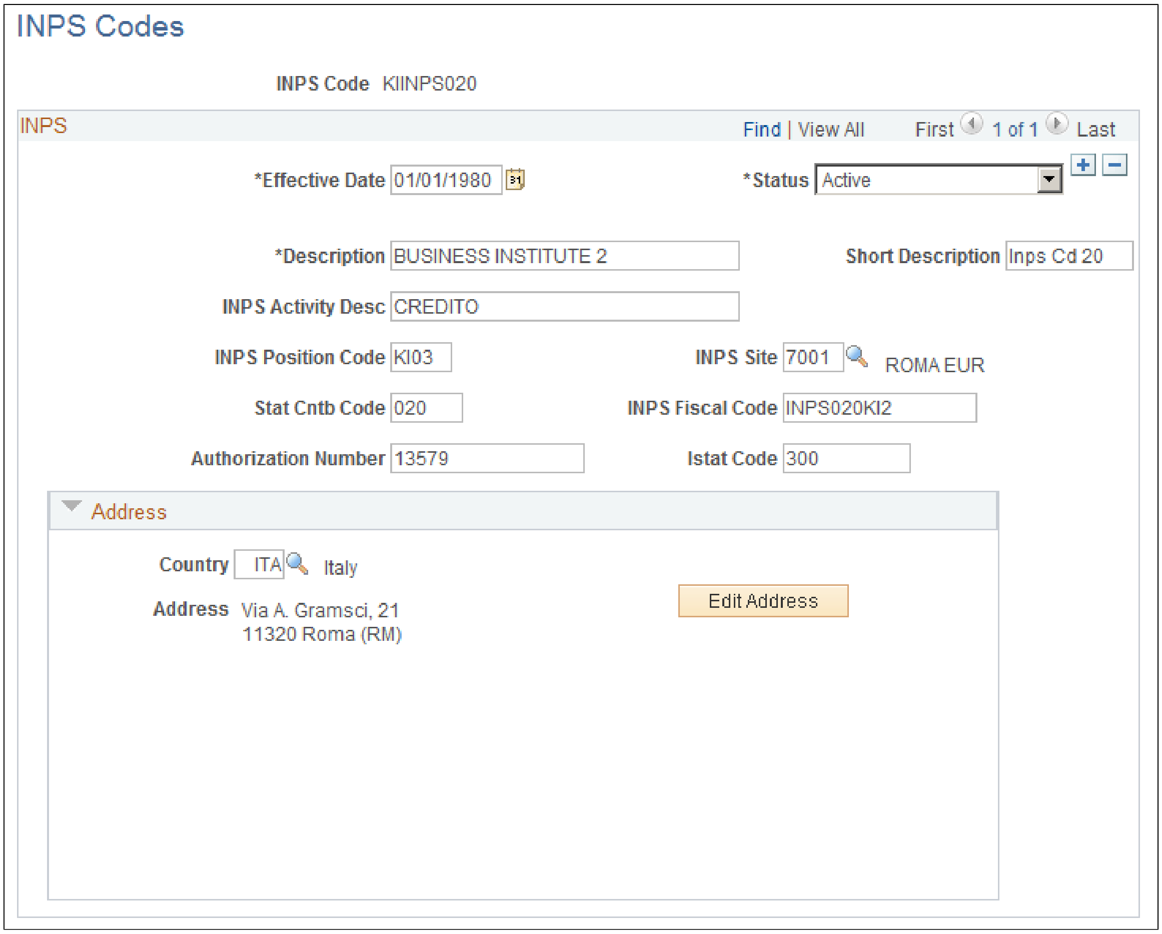
INPS Codes Page

Use the INPS Codes page (INPS_TBL_ITA) to define INPS data for social security contributions and information needed for social security reporting (DM10).

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ITA** > **INPS Codes** > **INPS Codes**

This example illustrates the fields and controls on the INPS Codes page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
INPS Activity Desc (INPS activity description)	Enter the company activity description to be reported on the INPS declarations.
INPS Position Code	Enter the company INPS position codes.
INPS Site	Select the INPS site to which the company must send declarations. Set up INPS site codes on the INPS Site page.
Stat Contr Code (statistical contribution code)	Enter the statistical contribution code to be reported on the INPS declarations.
INPS Fiscal Code	Enter the company fiscal code.
Authorization Number	Enter the authorization codes to be reported on the INPS declarations.

Field or Control	***Description***
Istat Code	Enter the Istat code to be reported on the INPS declarations.

Seniority Notification Periods Page

Use the Seniority Notification Periods page (SENIORIT_NOTIF_ITA) to define seniority termination notification periods for employment categories.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ITA** > **Seniority Notification Periods** > **Seniority Notification Periods**

This example illustrates the fields and controls on the Seniority Notification Periods page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Category	Select the job category to which this labor agreement notification applies.
Subcategory	Select the job subcategory to which this labor agreement notification applies.
Subcategory 2	Select the job subcategory 2 to which this labor agreement notification applies.
From Seniority	Enter the beginning of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.
To Seniority	Enter the end of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.

Field or Control	*Description*
Notif Days (notification days)	Enter, in days, the seniority applicable to this period. For example, a labor agreement might require that employees employed for more than 6 months but less than 12 months have a notification period of 30 calendar days.
Type of Day	Indicate whether the notification uses working days or calendar days.

(JPN) Setting Up Intercompany Transfer Company Data

To set up intercompany transfer company data, use the Set Up Company/Dept Codes (INTCPX_CPY_JPN) and Set Up Supervisor Level Codes (INTCPX_SPV_JPN) components.

These topics provide an overview of the setup of company data for intercompany transfers and describe how to set up company data for intercompany transfers.

Pages Used to Set Up Intercompany Transfer Company Data

Page Name	*Definition Name*	*Usage*
Set Up Company/Dept Codes Page (internal company transfer external company/department)	INTCPX_CPY_JPN	Set up company and department codes for companies outside the database to use for intercompany transfers.
Set Up Supervisor Level Codes Page	INTCPX_SPV_JPN	Set up supervisor level codes for companies outside the database to use for intercompany transfers.

Understanding Setup of Company Data for Intercompany Transfers

In any intercompany transfer, one of the companies is outside of the PeopleSoft database in which your organization's company data has been set up. Therefore it is necessary to create data in the database for those companies. These setup steps are for that purpose.

To set up company data for intercompany transfers for Japan:

- Set up a "dummy" pay group to use as the compensation indicator if you create intercompany transfers in which the host company is responsible for paying the employee.
- Set up company and department codes to use for companies outside of the database.
- Set up supervisor level codes to use for companies outside of the database.

Related Links

Understanding Supervisor Levels

"Understanding Payee Data" (PeopleSoft Global Payroll)
Indicating the Home or Host Compensation Owner

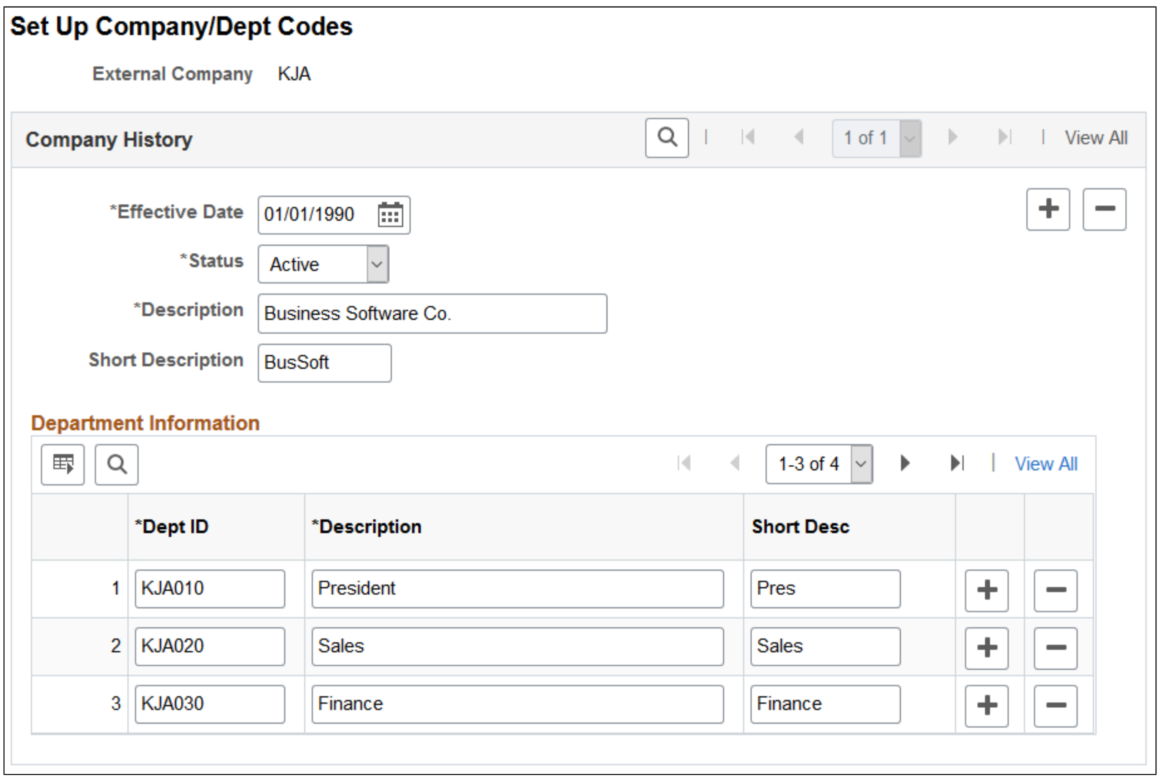
Set Up Company/Dept Codes Page

Use the Set Up Company/Dept Codes (internal company transfer external company/department) page (INTCPX_CPY_JPN) to set up company and department codes for companies outside the database to use for intercompany transfers.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data JPN** > **Set Up Company/Dept Codes** > **Set Up Company/Dept Codes**

This example illustrates the fields and controls on the Set Up Company/Dept Codes page. You can find definitions for the fields and controls later on this page.



The **Effective Date** must be prior to any intercompany transfer effective dates to transfer to the external company, and the **Status** option must be *Active.*

Enter required rows in the **Department Information** group box.

(MYS and SGP) Setting Up Festive Advance Religions Tables for Singapore and Malaysia

To set up festive advance religions, use the Religions MYS/SGP (RELIGION_TBL_FA) component.

Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.

Page Used to Set Up Festive Advance Religions for Singapore and Malaysia

Page Name	***Definition Name***	***Usage***
Religions MYS/SGP Page	RELIGION_TBL_FA	Define religions and festive advance types for Malaysia and Singapore. Select the appropriate festive advance type from the **FA Holiday Type** field associated with this religion

(NZL) Setting Up New Zealand Disability Codes

To set up New Zealand disability codes, use the Disability Codes (DISABILITY_TBL_NZL) component.

Page Used to Set Up New Zealand Disability Codes

Page Name	***Definition Name***	***Usage***
Disability NZL Page	DISABILITY_TBL_NZL	Create new disability type codes or modify existing codes.

(ESP) Setting Up Spanish Workforce Tables

To set up Spanish workforce tables, use the Social Security Country Code (SOCS_CNTRY_ESP), Industry Activity (INDUSTRY_ACT_ESP), Insurance Company (INSUR_COMPANY_ESP), Social Security Risk Code (SOCS_RISKCD_ESP), Social Security Scheme (SOCS_SCHEME_ESP), Social Security Occupation Cd (SOCS_OCCUPATN_ESP), Social Security Company Setup (SOCS_SETUP_ESP), Social Security Data (SSEC_DATA_ESP), and Hiring Center Table (HIRING_CENTER_ESP) components.

If your organization does business in Spain, you must set up several tables to track information required by the Spanish government for Spanish workers.

These topics discuss how to set up Spanish workforce tables.

Pages Used for Spanish Workforce Tables

Page Name	***Definition Name***	***Usage***
Country Codes Table Page	SOCS_CNTRY_ESP	Enter country codes valid for social security reporting purposes.
Industry Activity Table Page	INDUSTRY_ACT_CD_ESP	Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number.
Insurance Company Table Page	INSUR_COMP_CD_ESP	Enter insurance company descriptions and address information
Social Security Risk Code Page	SOCS_RISKCD_ESP	View the risk codes that can apply to employees in your organization.
Social Security Scheme Table - Scheme Page	SOCS_SCHEME_ESP	Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.
Social Security Scheme Table - Work Group Page	SOCS_WRKGRP_ESP	Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.
Social Security Scheme Table - Contribution Page	SOCS_CONTRIB_ESP	Define the contribution rates and percentages for both employees and employers used in the social security calculation.
Social Security Occupation Cd Page (social security occupation code)	SOCS_OCCUPATN_ESP	Define social security occupation codes.
Social Security Company Setup - Company Setup Page	SOCS_SETUP_ESP	Enter specific company information, including data needed for social security purposes.
Banking Setup Page	SOCS_SETUP_2_ESP	Enter pay type and specific bank information.
Social Security Data Page	SOCS_DATA_ESP	Define a time limit for transferring FDI medical report data to the social security agency.

Page Name	*Definition Name*	*Usage*
Hiring Center Table Page	HIRING_CENTER_ESP	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

Country Codes Table Page

Use the Country Codes Table page (SOCS_CNTRY_ESP) to enter country codes valid for social security reporting purposes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Country Codes Table** > **Country Codes Table**

This example illustrates the fields and controls on the Country Codes Table page. You can find definitions for the fields and controls later on this page.

Field or Control	*Description*
Country	Enter the standard ISO country code.

Field or Control	***Description***
Social Security Country Code	Enter the country code used for social security processing.

Industry Activity Table Page

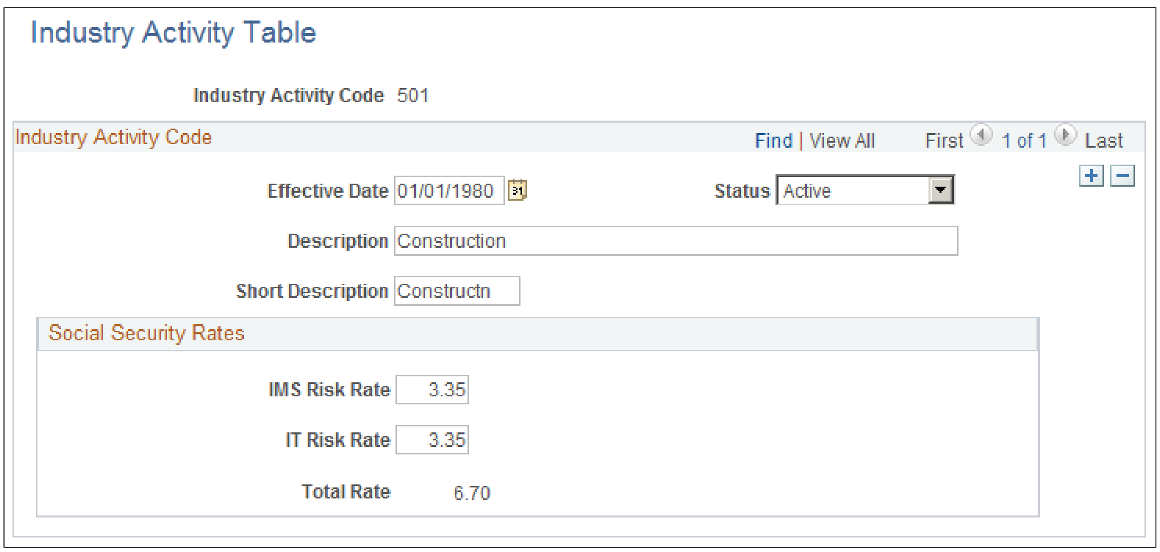
Use the Industry Activity Table page (INDUSTRY_ACT_CD_ESP) to enter industry activity codes and descriptions.

The industry activity code helps determine the employer social security number.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Industry Activity Table** > **Industry Activity Table**

This example illustrates the fields and controls on the Industry Activity Table page. You can find definitions for the fields and controls later on this page.



Enter the effective date, status, description, and short description of the industry activity.

Social Security Rates

Enter percentages for Invalidez, Muerte y Supervivencia (IMS) and Incapacidad Temporal (IT) risks. For payees with no assigned occupational code, PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

Related Links

"Retrieving Calculation Percentages and Rates" (PeopleSoft Global Payroll for Spain)

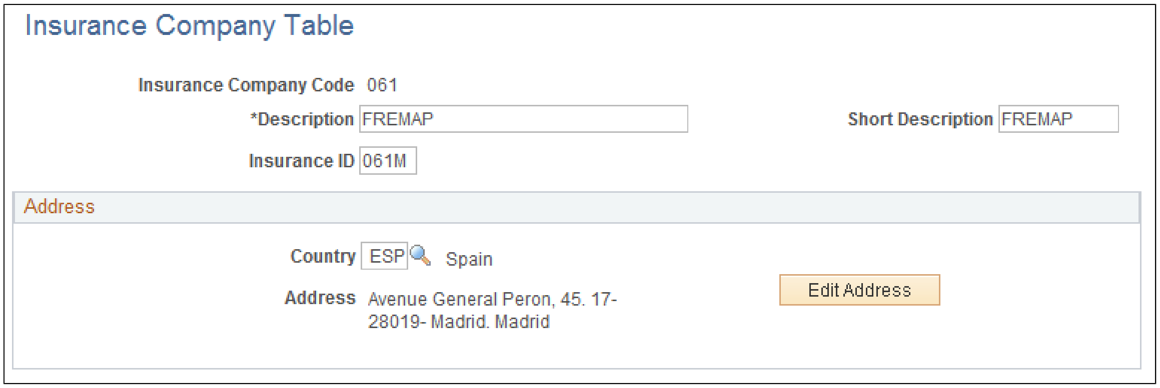
Insurance Company Table Page

Use the Insurance Company Table page (INSUR_COMP_CD_ESP) to enter insurance company descriptions and address information.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ESP > Insurance Company Table > Insurance Company Table

This example illustrates the fields and controls on the Insurance Company Table page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Edit Address	Click to enter or modify address information.

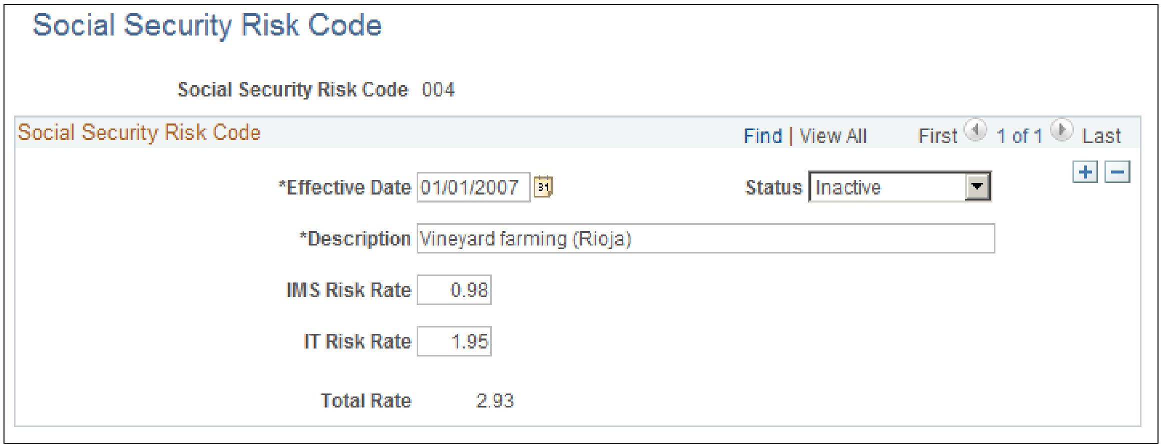
Social Security Risk Code Page

Use the Social Security Risk Code page (SOCS_RISKCD_ESP) to view the risk codes that can apply to employees in your organization.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ESP > Social Security Risk Code > Social Security Risk Code

This example illustrates the fields and controls on the Social Security Risk Code page. You can find definitions for the fields and controls later on this page.



Note: The Spanish government requires employers to assign jobs a social security risk code that rates the risk of illness, accident, or death connected with that type of job.

The PeopleSoft system delivers all social security risk codes as system data.

Field or Control	***Description***
Social Security Risk Code	The code that you entered to access this page. This is the code defined on this page.
IMS Risk Rate (Riesgo de Invalidez/Muerte/ Supervivencia)	Displays the IMS risk rate that applies to this social security risk code. The Spanish government assigns IMS risk rate codes that assess the risk of work-related disability, death, or survival.
IT Risk Rate (Riesgo de Incapacidad Temporal)	Displays the IT risk rate that applies to this social security risk code. The Spanish government assigns IT risk rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.
Total Rate	The system automatically calculates the total rate, the sum of the IMS risk rate, and the IT risk rate.

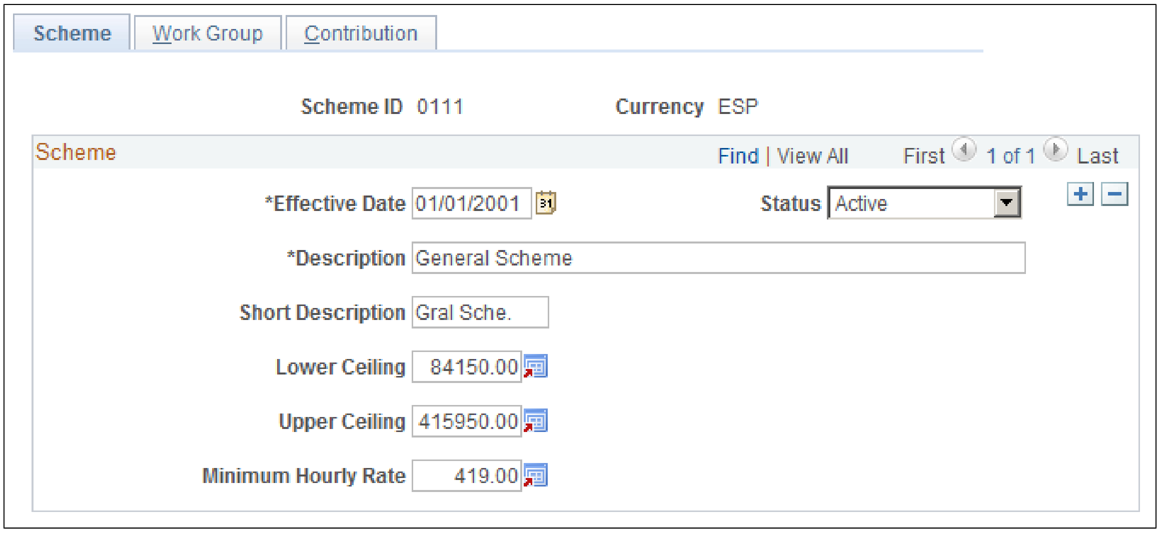
Social Security Scheme Table - Scheme Page

Use the Scheme page (SOCS_SCHEME_ESP) to review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Social Security Scheme Table** > **Scheme**

This example illustrates the fields and controls on the Scheme page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Lower Ceiling	Enter the lower ceiling amount used to calculate the professional contingencies funding base.
Upper Ceiling	Enter the upper ceiling amount used to calculate the professional contingencies funding base.
Minimum Hourly Rate	Enter the amount used to calculate the professional contingencies funding base in the case of employees working part-time. **Important!** To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

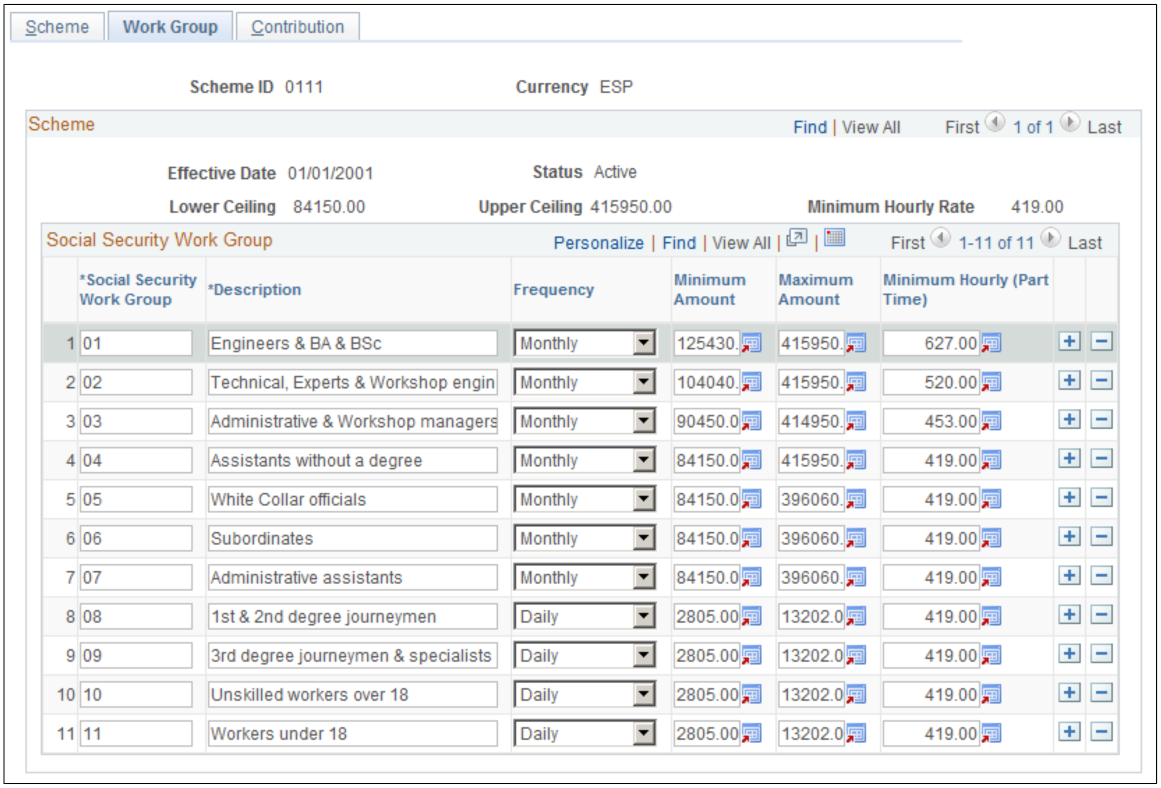
Social Security Scheme Table - Work Group Page

Use the Work Group page (SOCS_WRKGRP_ESP) to define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Social Security Scheme Table** > **Work Group**

This example illustrates the fields and controls on the Work Group page. You can find definitions for the fields and controls later on this page.



Scheme | Work Group | Contribution

Scheme ID 0111 Currency ESP

Scheme Find | View All First 1 of 1 Last

Effective Date 01/01/2001 Status Active

Lower Ceiling 84150.00 Upper Ceiling 415950.00 Minimum Hourly Rate 419.00

Social Security Work Group Personalize | Find | View All | First 1-11 of 11 Last

	*Social Security Work Group	*Description	Frequency	Minimum Amount	Maximum Amount	Minimum Hourly (Part Time)
1	01	Engineers & BA & BSc	Monthly	125430.	415950.	627.00
2	02	Technical, Experts & Workshop engin	Monthly	104040.	415950.	520.00
3	03	Administrative & Workshop managers	Monthly	90450.0	414950.	453.00
4	04	Assistants without a degree	Monthly	84150.0	415950.	419.00
5	05	White Collar officials	Monthly	84150.0	396060.	419.00
6	06	Subordinates	Monthly	84150.0	396060.	419.00
7	07	Administrative assistants	Monthly	84150.0	396060.	419.00
8	08	1st & 2nd degree journeymen	Daily	2805.00	13202.0	419.00
9	09	3rd degree journeymen & specialists	Daily	2805.00	13202.0	419.00
10	10	Unskilled workers over 18	Daily	2805.00	13202.0	419.00
11	11	Workers under 18	Daily	2805.00	13202.0	419.00

Once you've reviewed the ceilings and hourly rate on the Scheme page, use the Work Group page to view and update the maximum and minimum bases for regular employees, and the minimum hourly rate used to calculate the funding base for part-time employees. If you need to define rates and percentages for schemes other than the general scheme, you can do so on this page as well.

Field or Control	***Description***
Social Security Work Group	All employees who contribute to social security must be assigned to social security work groups (also known as contribution groups) based on their level of education, professional skills, and job title. The SS Work Group field displays the numerical code for each group.
Frequency	This field displays an *M* (Monthly) or a *D* (Daily), depending on whether members of the social security work group have their contributions calculated on a daily basis or a monthly basis.
Minimum Amount	Enter the minimum amount used to calculate the common contingencies funding base.
Maximum Amount	Enter the maximum amount used to calculate the common contingencies funding base.

Field or Control	*Description*
Minimum Hourly (Part Time)	Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees. **Important!** To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

Related Links

Job Information Page

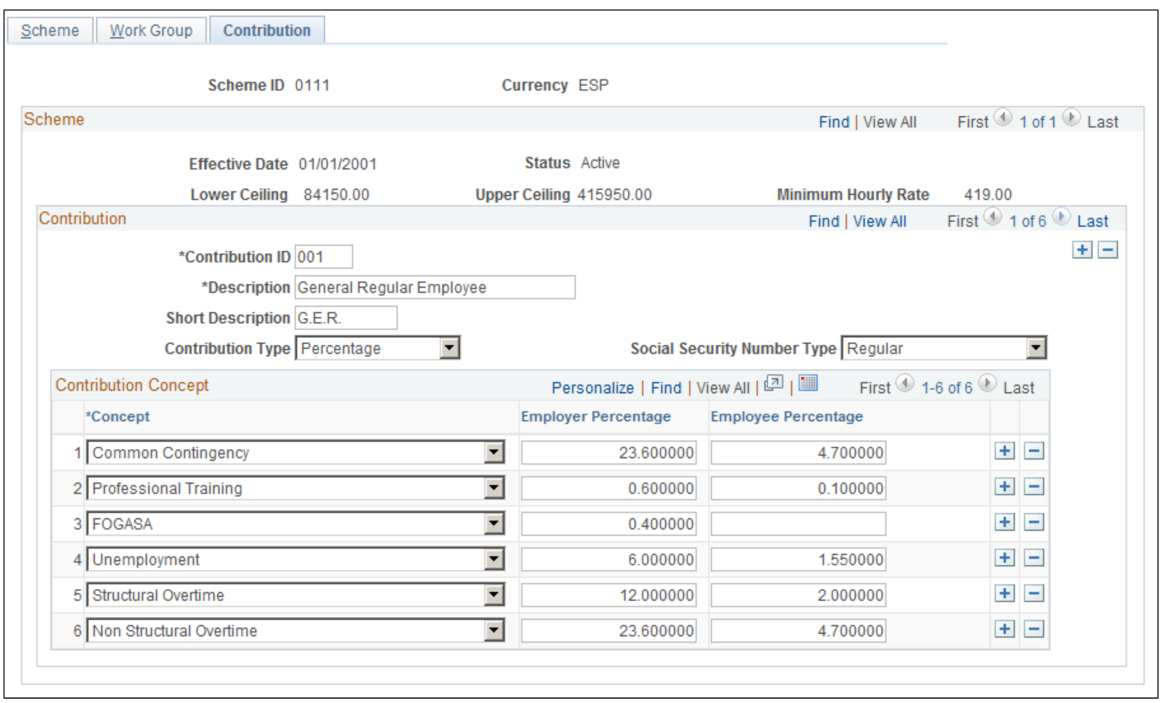
Social Security Scheme Table - Contribution Page

Use the Contribution page (SOCS_CONTRIB_ESP) to define the contribution rates and percentages for both employees and employers used in the social security calculation.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Social Security Scheme Table** > **Contribution**

This example illustrates the fields and controls on the Contribution page. You can find definitions for the fields and controls later on this page.



If you need to define rates and percentages for schemes other than the general scheme, you can do so on this page.

Field or Control	***Description***
Contribution ID	In PeopleSoft Global Payroll for Spain, there are multiple contribution IDs for each scheme ID, and each contribution ID is associated with its own rates and percentages. To view the different contribution ID classes and their corresponding rates or percentages, use the scroll arrows in the Contribution and Contribution Concepts scroll areas. Possible values for the contribution ID are: • *General Empleado Regular* (general regular employee) • *Empleado Regular Tiempo Completo* (full-time regular employee) • *Empleado Reg Tiempo Parcial* (part-time regular employee) • *Empleado Regular E.T.T.* (E.T.T. regular employee) • *Training Contracts* • *Apprenticeship Contract* **Note:** You must associate individual employees with a Scheme and SS Contribution ID on the Contract Data page.
Social Security Number Type	Select one of the following values: • *Regular:* Select to define the percentages used to calculate the contributions of employees with regular contracts. • *Apprentice:* Select to define rates used to calculate the contributions of apprentices. • *Training:* Select to define rates used to calculate the contributions of employees with training contracts.
Contribution Type	Select *Percentage* if you will be entering percentages in the Employer Percentage or Employee Percentage fields. If you select *Percentage,* the Employer and Employee Rate fields become unavailable for data entry. Select *Rate* if you will be entering rates in the Employer or Employee Rate fields. If you select *Rate,* the Employer and Employee Percentage fields become unavailable for data entry. **Important!** You should always select *Percentage* for regular employees, and *Rate* for apprentices and trainees.

Field or Control	***Description***
Concept	Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are: • *Common Contingency* • *FOGASA* • *Non Structural Overtime* • *Permanent Disability D & S* • *Professional Training* • *Structural Overtime* • *Temporary Disability* • *Unemployment*
Employer Rate	Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field. **Note:** Only contributions of apprentices and trainees are based on fixed rates.
Employer Percentage	Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.
Employee Rate	Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.
Employee Percentage	Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

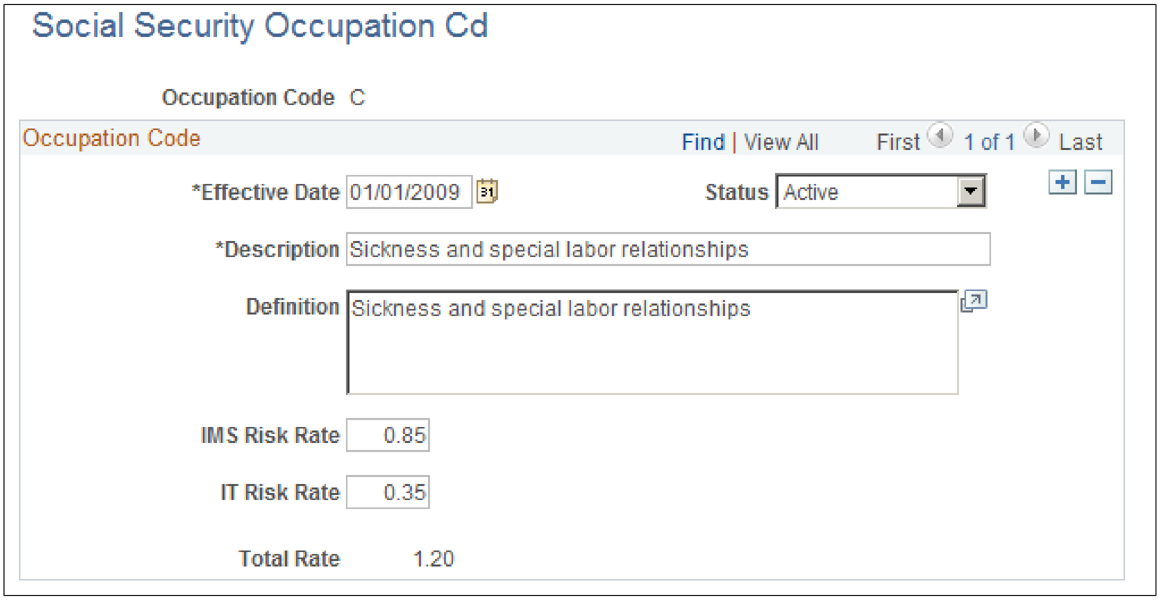
Social Security Occupation Cd Page

Use the Social Security Occupation Cd (social security occupation code) page (SOCS_OCCUPATN_ESP) to define social security occupation codes.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ESP > Social Security Occupation Cd > Social Security Occupation Cd

This example illustrates the fields and controls on the Social Security Occupation Cd (social security occupation code) page. You can find definitions for the fields and controls later on this page.



Enter the effective date, status, description, and short description of the occupation code.

Enter percentages for Invalidez, Muerte y Supervivencia (IMS) and Incapacidad Temporal (IT) risks. PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

Related Links

“Retrieving Calculation Percentages and Rates” (PeopleSoft Global Payroll for Spain)

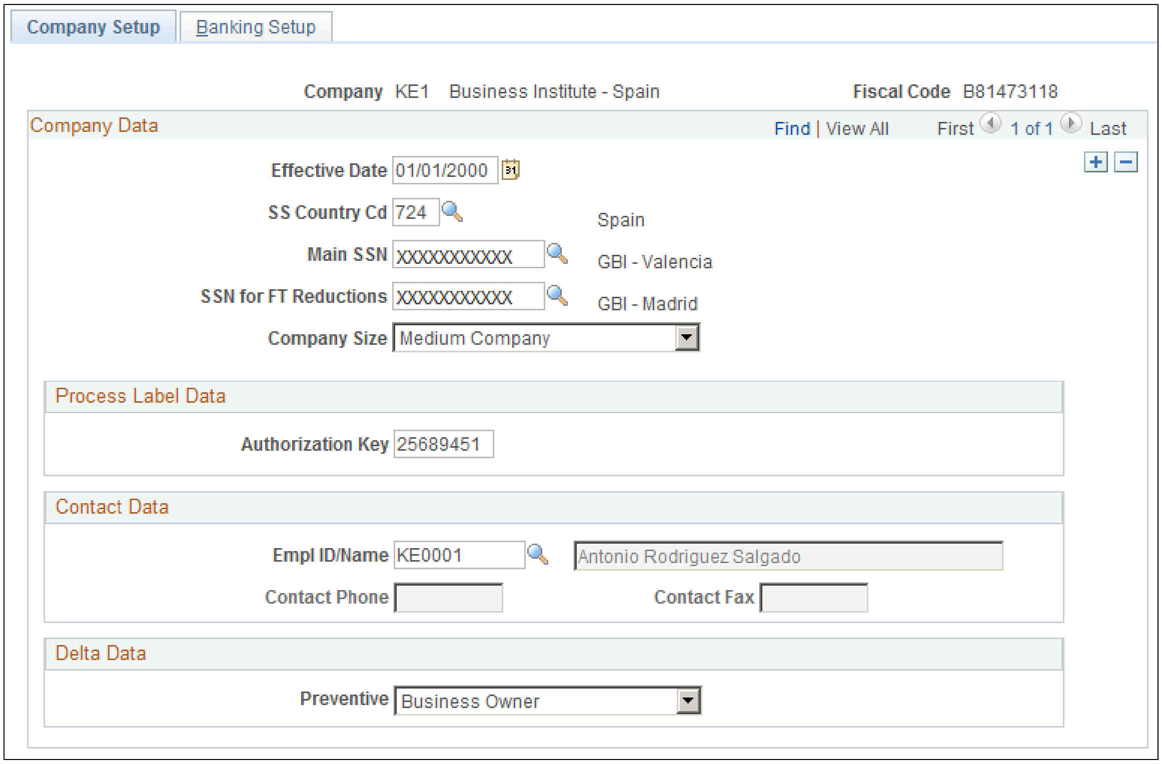
Social Security Company Setup - Company Setup Page

Use the Company Setup page (SOCS_SETUP_ESP) to enter specific company information, including data needed for social security purposes.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ESP > Social Security Company Setup > Company Setup

This example illustrates the fields and controls on the Company Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
SS Country Cd (social security country code)	Enter the social security country code for the company.
Authorization Key	Enter the authorization code to access Winsuite provided by the Social Security General Treasury.

Delta Data

Field or Control	***Description***
Preventive	Identify the kind of labor risk prevention management that the company uses. Valid values are: • *Business Owner:* The company assumes responsibilities. Fills the <asunpersona> tag. • *Designated Workers:* Managed by designated employees. Fills the <trabdesigna> tag. • *External:* Managed by an external service outside of the company. Fills the <serprevpro> tag. • *Internal:* Managed by a service organization within the company. Fills the <serprevaje> tag. • *None:* The company does not manage labor risk prevention. Fills the <ninguna> tag. • *Shared:* Managed jointly by several services. Fills the <serprevman> tag. See Managing Delta Communications.

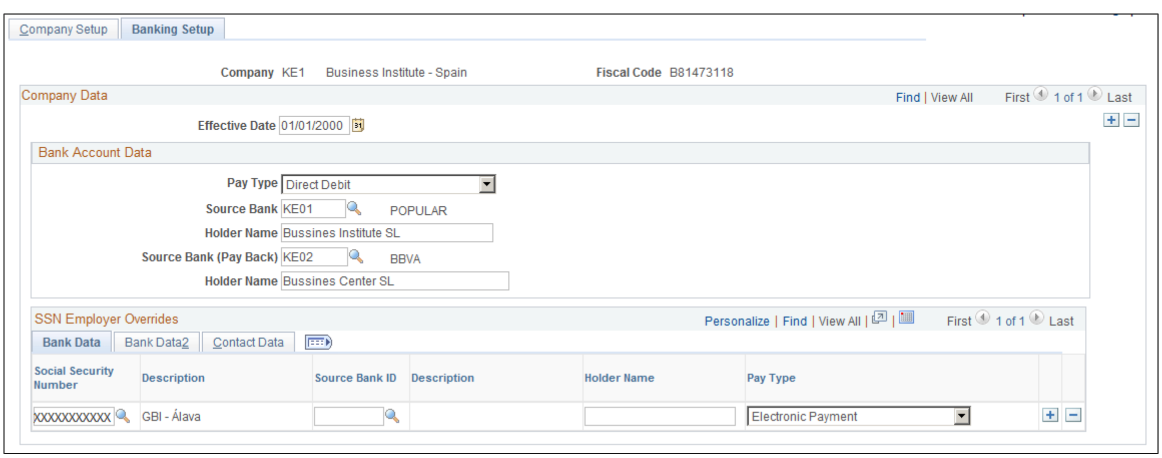
Banking Setup Page

Use the Banking Setup page (SOCS_SETUP_2_ESP) to enter pay type and specific bank information.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ESP > Social Security Company Setup > Banking Setup

This example illustrates the fields and controls on the Banking Setup page. You can find definitions for the fields and controls later on this page.



Bank Account Data

Field or Control	***Description***
Source Bank ID	Enter the name of the bank the company uses to pay social security contributions.
Holder Name	Enter the name the company uses at the bank.

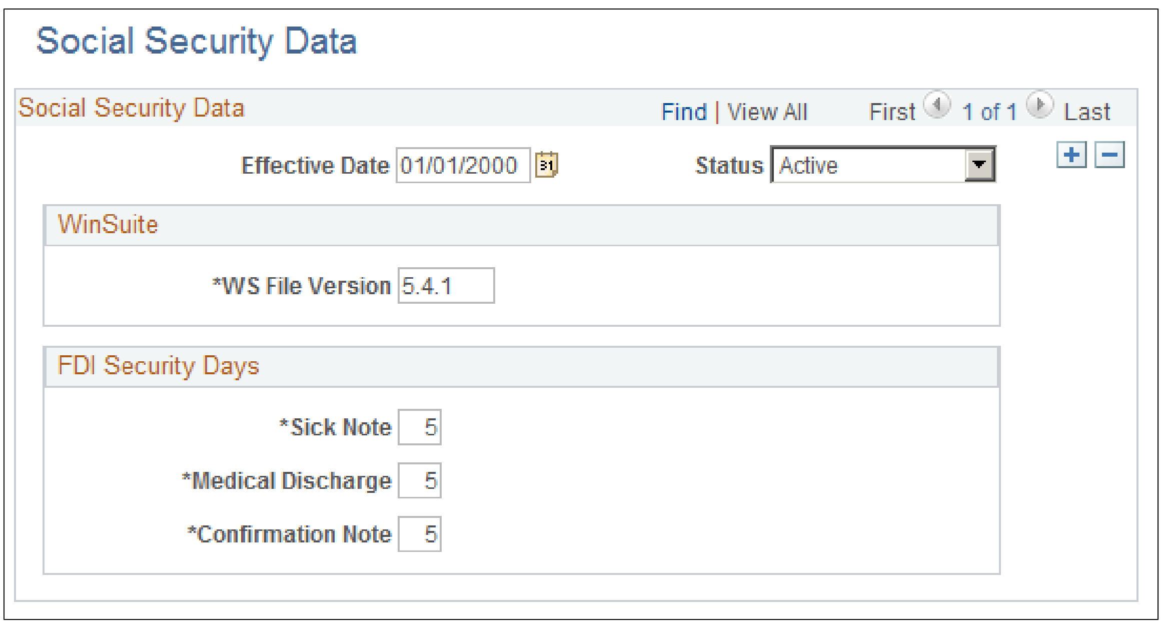
Social Security Data Page

Use the Social Security Data page (SOCS_DATA_ESP) to define a time limit for transferring FDI medical report data to the social security agency.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Social Security Data** > **Social Security Data**

This example illustrates the fields and controls on the Social Security Data page. You can find definitions for the fields and controls later on this page.



Note: If your organization uses Global Payroll for Spain, do not use this page to define FDI parameters. Instead, use the Social Security Data page in the GPES_SOCS_DATA_ESP component.

See "Generating the FDI Medical Report Text File" (PeopleSoft Global Payroll for Spain).

Field or Control	***Description***
WS File Version	This field identifies the version of the Winsuite software used by the social security agency for reporting. As this software is updated, you must update the file version.
Sick Note	Specify the time limit (in days) for transferring sick note data to the social security agency following receipt of the note from an employee.
Medical Discharge	Specify the time limit (in days) for transferring medical discharge data to the social security agency following receipt of a discharge note from an employee.
Confirmation Note	Specify the time limit (in days) for transferring confirmation note data to the social security agency following receipt of the note from an employee.

Hiring Center Table Page

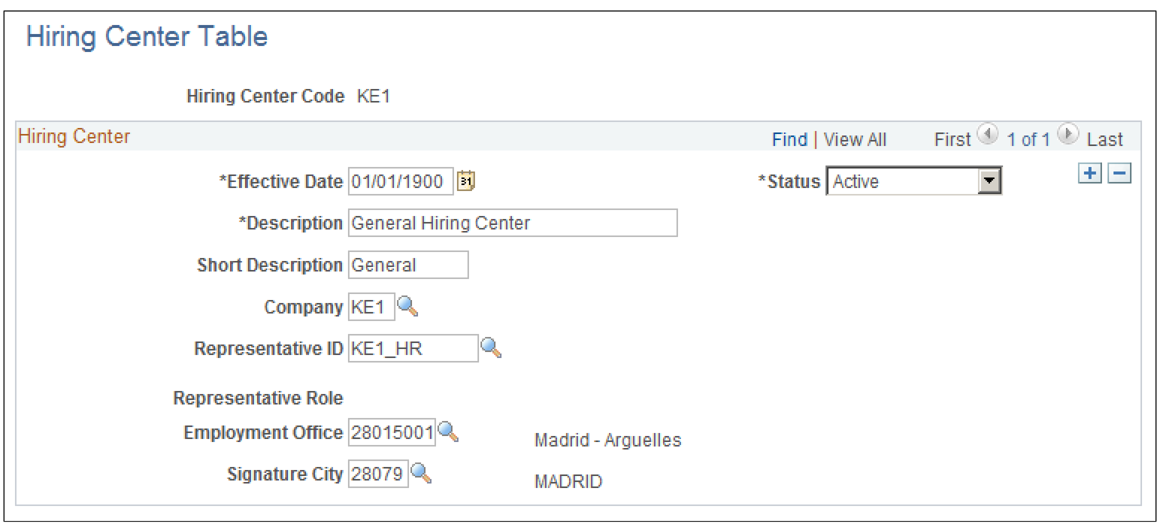
Use the Hiring Center Table page (HIRING_CENTER_ESP) to define the hiring centers you will attach to employee personnel records on the Contract Data page.

You connect every Spanish employee with a hiring center.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data ESP** > **Hiring Center Table** > **Hiring Center Table**

This example illustrates the fields and controls on the Hiring Center Table page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Hiring Center Code	The hiring center code that you entered to access this page.
Company, Representative ID, and **Representative Role**	Select the company and representative ID of the person who is responsible for signing employment contracts at this hiring center. The role displays a description of the ID you designated in the **Representative ID** field.
Employment Office	Enter a description of the employment office for this hiring center.
Signature City	Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the city's name here.

Related Links

"Understanding PeopleSoft HCM System Data Regulation" (Application Fundamentals)

(BRA) Setting Up Brazilian Workforce Tables

To set up Brazilian workforce tables, use the Tax Suspension Type BRA (TAX_SUSP_BRA), Admin/Legal Proceedings BRA (LEGAL_PROC_BRA), Establishment ID Type BRA (ESTAB_TYPE_BRA), Establishment BRA (ESTAB_TBL_BRA), Centralization Data BRA (CENTRALIZATION_BRA), Legal Contract Type (CONTRACT_TYPE_BRA), Health Providers (HEALTH_PROV_BRA), Private Fund FAPI Entities (FAPI_PROV_BRA), CBO Codes BRA (CBO_CD_TBL_BRA), City Codes BRA (CITY_CODES_BRA), Special Training Codes BRA (SPECIAL_TRAINI_BRA), and Income Tax Type Abroad BRA (INC_TAX_TYPE_BRA) components.

These topics discuss how to set up Brazilian workforce tables.

Pages Used to Set Up Brazilian Workforce Tables

Page Name	***Definition Name***	***Usage***
Adm/Legal Proceedings Parameters BRA Page	PROC_PARAM_BRA	Enable the functionality to maintain proceeding details for tax suspension purposes.
Tax Suspension Type BRA Page	TAX_SUSP_BRA	Define tax suspension types used in administrative or judicial proceedings.
Administrative/Legal Proceedings BRA Page	LEGAL_PROC_BRA	Manage administrative or legal proceedings filed for tax reduction or exemption purposes.

Page Name	***Definition Name***	***Usage***
Establishment ID Type BRA Page	ESTAB_TYPE_BRA	Enter types of establishment ID codes and the format for each ID.
"Establishment Address Page" (Application Fundamentals)	ESTAB_TBL1_GBL	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
"Establishment - Phone Numbers Page" (Application Fundamentals)	ESTAB_TBL2_GBL	Enter the establishment's telephone, fax machine, and other related numbers.
Additional Info - Brazil Page (additional information - Brazil)	ESTAB_TBL_BRA	Enter additional information about the establishment that is specific to the country of Brazil.
Judicial Gathering Data Page	FPAS_JUD_C_BRA_ SEC	Enter tax entities and any associated judicial proceeding numbers and FPAS suspension codes.
FPAS Details Page	FPAS_ENT_BRA_ DET	Review FPAS information for establishments.
Centralization Data BRA Page	CENTRALIZATION_ BRA	Group establishments to obtain centralized data for multiple reports such as SEFIP and CAGED.
Legal Contract Type Page	CNT_TYPE_BRA	Associate contract types with legal contract types.
By Employee Classification Page	CNT_TYPE_EC_ BRA	Associate employee classes with legal contract types.
Health Providers Page	HEALTH_PROV_ BRA	Define health provider codes.
Private Fund & FAPI Entities Page	FAPI_PROV_BRA	Specify private pension funds and associated CNPJ numbers.
CBO Codes BRA Page	CBO_CD_TBL_BRA	Define occupational codes.
City Codes BRA Page	CITY_CODES_BRA	Define city codes by state.
Special Training Codes BRA Page	SPECIAL_TRAIN_ BRA	Define special training codes.
Income Tax Type Abroad BRA Page	INC_TAX_TYPE_ BRA	Define income tax type codes for employees living abroad.

Understanding Brazilian Establishments

A company may have several establishments. You must enter data required for reporting purposes for each establishment, such as different ID types.

Note: All Brazilian establishments must belong to a company.

Understanding Administrative and Legal Proceedings

PeopleSoft provides the ability to register and manage administrative and legal proceeding information that influences the calculation of the INSS, IRRF, or FGTS.

Perform these steps to set up the Administrative and Legal Proceedings functionality:

1. Activate the functionality on the Adm/Legal Proceedings Parameters BRA Page.
2. Define tax suspension types on the Tax Suspension Type BRA Page.

After the setup is completed, you can create and maintain administrative and legal proceedings of employers, taxpayers, or entities with collective representation of workers against government agencies on the Administrative/Legal Proceedings BRA Page. Prompts become available in fields where you can select the applicable proceeding numbers and suspension codes on establishment and tax exemption pages.

Note: The Administrative and Legal Proceedings functionality is required, if you use Global Payroll for Brazil for the reporting of the S-1070 event in eSocial.

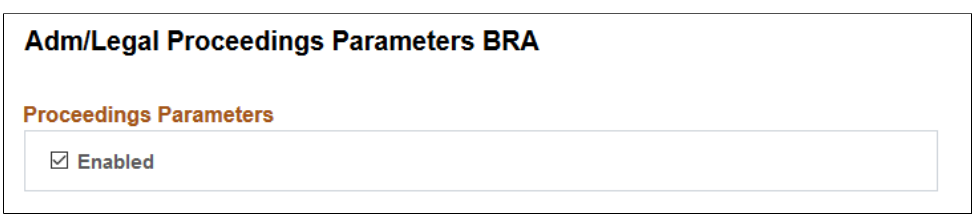
Adm/Legal Proceedings Parameters BRA Page

Use the Adm/Legal Proceedings Parameters BRA (administrative/legal proceedings parameters BRA) page (PROC_PARAM_BRA) to enable the functionality to maintain proceeding details for tax suspension purposes.

Navigation:

Set Up HCM > Install > Country Specific > Adm/Legal Proc Parameters BRA > Adm/Legal Proceedings Parameters BRA

This example illustrates the fields and controls on the Adm/Legal Proceedings Parameters BRA page.



Field or Control	Description
Enabled	Select to enable the Administrative and Legal Proceedings functionality. If selected, field prompts become available on pages such as (BRA) Tax Exemption BRA Page, Additional Info - Brazil Page, Judicial Gathering Data Page, and “Exemption Proceedings Page” (PeopleSoft Global Payroll for Brazil), where you can specify proceedings and their suspension codes that are defined on the Administrative/Legal Proceedings BRA Page. Select this option if you use Global Payroll for Brazil to submit proceeding information (which is maintained on the Administrative/Legal Proceedings BRA Page) for eSocial reporting (S-1070). Clear this option if you do not wish to submit S-1070 events to the Government through Global Payroll for Brazil. Field prompts are not available for selecting proceeding numbers and suspension codes on those pages, which means that you have to enter the values manually.

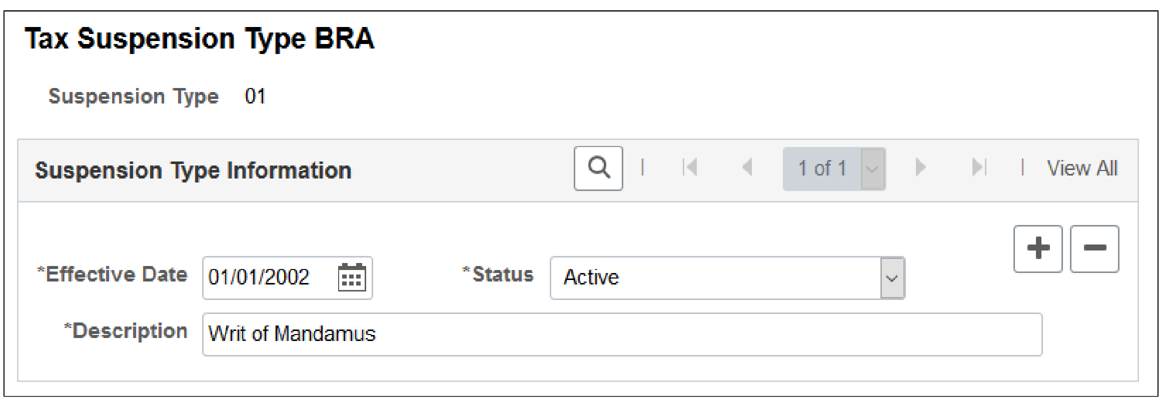
Tax Suspension Type BRA Page

Use the Tax Suspension Types BRA page (TAX_SUSP_BRA) to define tax suspension types used in administrative or judicial proceedings.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Tax Suspension Type BRA** > **Tax Suspension Type BRA**

This example illustrates the fields and controls on the Tax Suspension Types BRA page.



Global Payroll for Brazil delivers a list of government-provided tax suspension types for use in eSocial reporting.

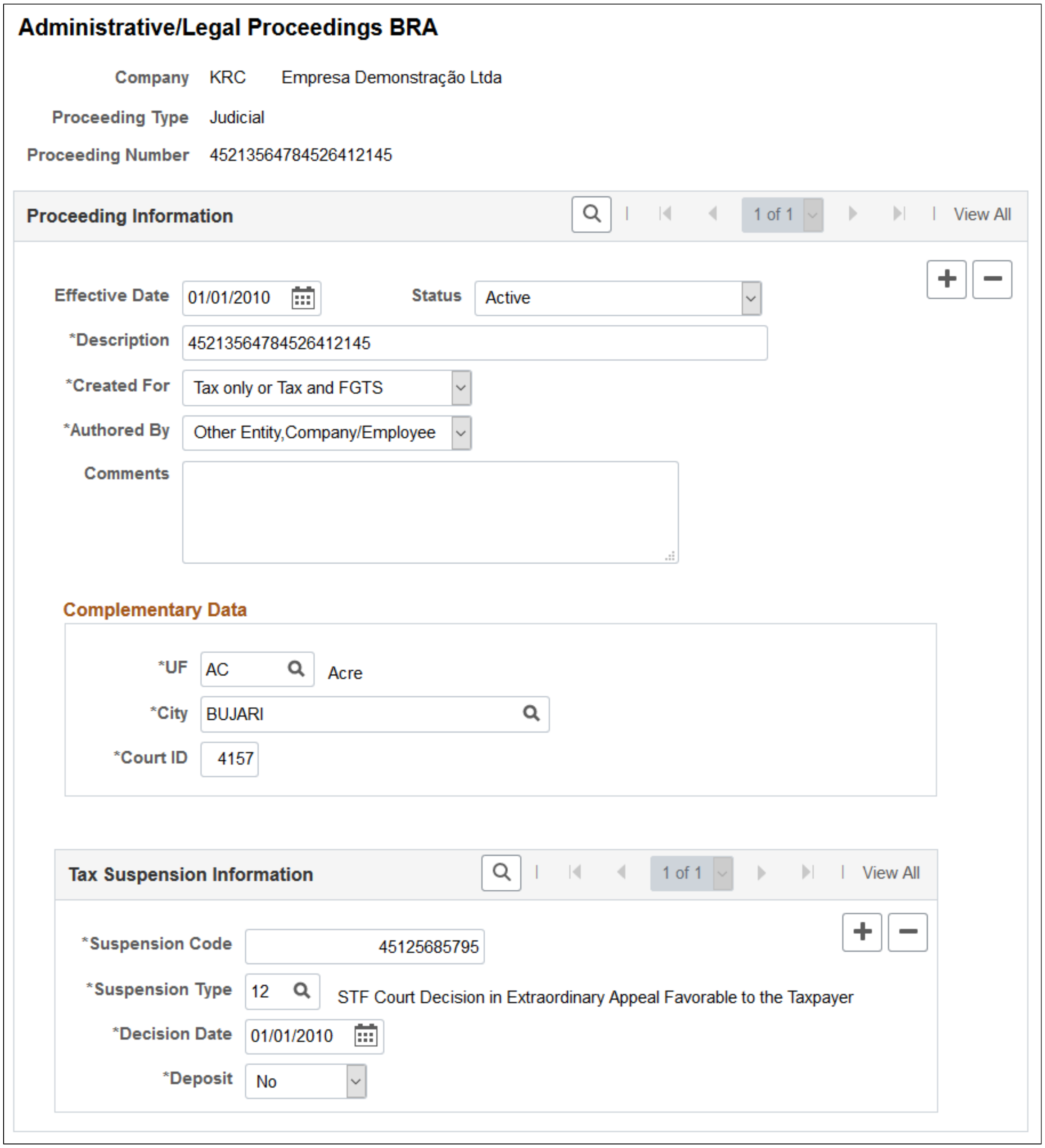
Administrative/Legal Proceedings BRA Page

Use the Administrative/Legal Proceedings BRA page (LEGAL_PROC_BRA) to manage administrative or legal proceedings filed for tax reduction or exemption purposes.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Admin/Legal Proceedings BRA > Administrative/Legal Proceedings BRA

This example illustrates the fields and controls on the Administrative/Legal Proceedings BRA page.



Add only proceedings that influence the calculation of taxes or FGTS.

Field or Control	***Description***
Company	Displays the company of the proceeding. This is a required field.

Field or Control	***Description***
Proceeding Type	Displays the selected type of the proceeding. Values are: *Administrative* *Benefit Number – INSS* *FAP – Process before 2019* *Judicial*
Proceeding Number	Displays the entered proceeding number. This is a required field. Algorithm is in place to validate the proceeding number against the selected proceeding type. The system displays an error if the number cannot be validated successfully. The proceeding number is: • 17 or 21 digits in length if the selected proceeding type is *Administrative*. • 10 digits in length if the selected proceeding type is *Benefit Number – INSS*. • 16 digits in length if the selected proceeding type is *FAP – Process before 2019*. • 20 digits in length if the selected proceeding type is *Judicial*.
Description	Enter a required description for the proceeding. The maximum length is 100 characters.
Created For	Select the subject or scope of the proceeding. This is a required field. Values are: *FGTS only/ Termination Soc Cont* (FGTS only, or Termination Social Contribution). *Tax only or Tax and FGTS* **Note:** You may see additional Created For values for proceedings there were added to the PeopleSoft system before the eSocial S-1.0 version.

Field or Control	*Description*
Authored By	Select the author of the proceeding (for tax reduction or exemption). Values are: *Taxpayer*: Company or employee who pays the tax. *Other Entity,Company/Employee* This field is required if the specified proceeding type is *Judicial*.
Comment	Enter a description or comment for the proceeding. The maximum length is 255 characters.

Complementary Data

Select the state and city of where the proceeding was filed, and enter the 4-digit court ID.

This section is required if the specified proceeding type is *Judicial* and the Created For field value is *Tax only or Tax and FGTS*.

Tax Suspension Information

This section is required if the Created For field value is *Tax only or Tax and FGTS*.

Note: If you update the tax suspension information (for example, the suspension code) on the Admin/ Legal Proceeding BRA page after the proceeding information was selected on another page (for example, "Exemption Proceedings Page" (PeopleSoft Global Payroll for Brazil)) using the field prompt, be sure to also update the same information on that page manually. That way, appropriate events (for example, S-1005, S-1010, S-1020, S-1200, S-2299, and S-2399) can be triggered to report the update to the Government.

Field or Control	*Description*
Suspension Code	Enter the tax suspension number, which is 14 digits in length. Do not enter a suspension code more than once for the same proceeding number.

Field or Control	***Description***
Suspension Type	Select the type of the tax suspension. The list of available suspension types varies based on the selected proceeding type: If the proceeding type is *Administrative*, valid suspension types are *03*,*14*, and *92*. If the proceeding type is *Benefit Number* - *INSS*, all suspension types are available. If the proceeding type is *FAP* - *Process before 2019*, the valid suspension type is *14*. If the proceeding type is *Judicial*, valid suspension types are *01*, *02*, *04*, *05*, *08*, *09*, *10*, *11*, *12*, *13*, *90*, and *92*. Suspension types are defined on the Tax Suspension Type BRA Page.
Decision Date	Enter the date that the tax suspension decision was made.
Deposit	Indicate if deposit (for tax payment) is available in the bank from the taxpayer during the proceeding. The system automatically sets the value to *Yes* if the specified suspension type is either *02* or *03*, and *No* if the specified suspension type is 90. The field value is not editable. You can update the Deposit field value for other suspension types.

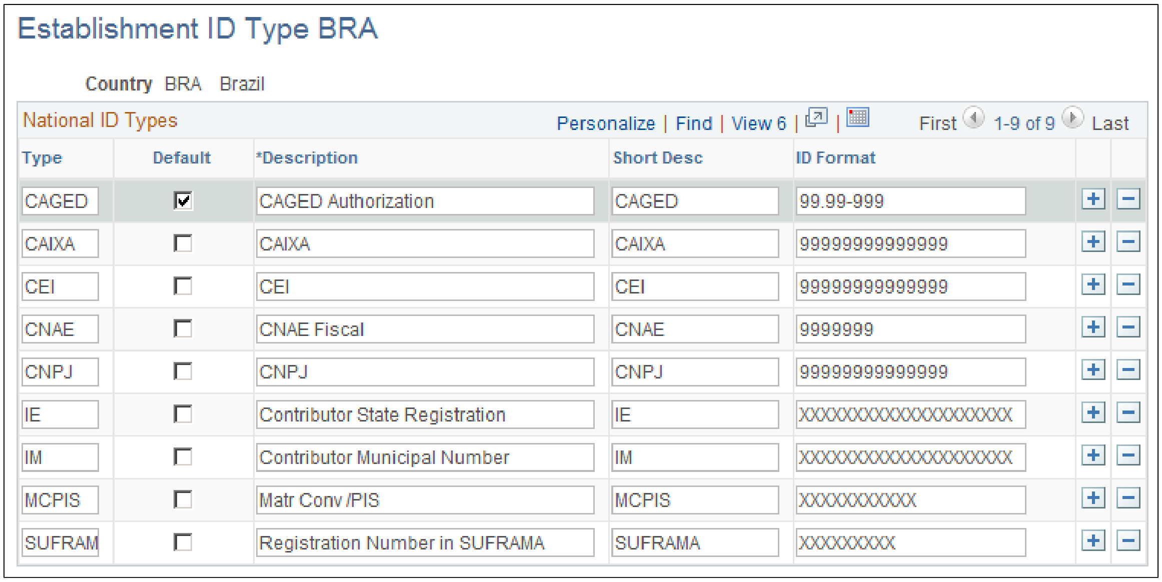
Establishment ID Type BRA Page

Use the Establishment ID Type BRA page (ESTAB_TYPE_BRA) to enter types of establishment ID codes and the format for each ID.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Establishment ID Type BRA** > **Establishment ID Type BRA**

This example illustrates the fields and controls on the Establishment ID Type BRA page. You can find definitions for the fields and controls later on this page.


Establishment ID Type BRA

Country BRA Brazil

National ID Types Personalize | Find | View 6 | First 1-9 of 9 Last

Type	Default	*Description	Short Desc	ID Format
CAGED	☑	CAGED Authorization	CAGED	99.99-999
CAIXA	☐	CAIXA	CAIXA	99999999999999
CEI	☐	CEI	CEI	99999999999999
CNAE	☐	CNAE Fiscal	CNAE	9999999
CNPJ	☐	CNPJ	CNPJ	99999999999999
IE	☐	Contributor State Registration	IE	XXXXXXXXXXXXXXXXXXXX
IM	☐	Contributor Municipal Number	IM	XXXXXXXXXXXXXXXXXXXX
MCPIS	☐	Matr Conv /PIS	MCPIS	XXXXXXXXXXX
SUFRAM	☐	Registration Number in SUFRAMA	SUFRAMA	XXXXXXXXX

Field or Control	***Description***
Type	Enter the type of establishment ID code. You can enter ID types that are not legal IDs (national IDs) but are required for certain reports.
Default	Select to establish this type of ID code as the default for the selected country.
ID Format	Specify the format of the ID code. Enter a 9 for each digit of the ID number. The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types: • CNPJ: 99.999.999/9999-99 • CNAE: 99.99-9

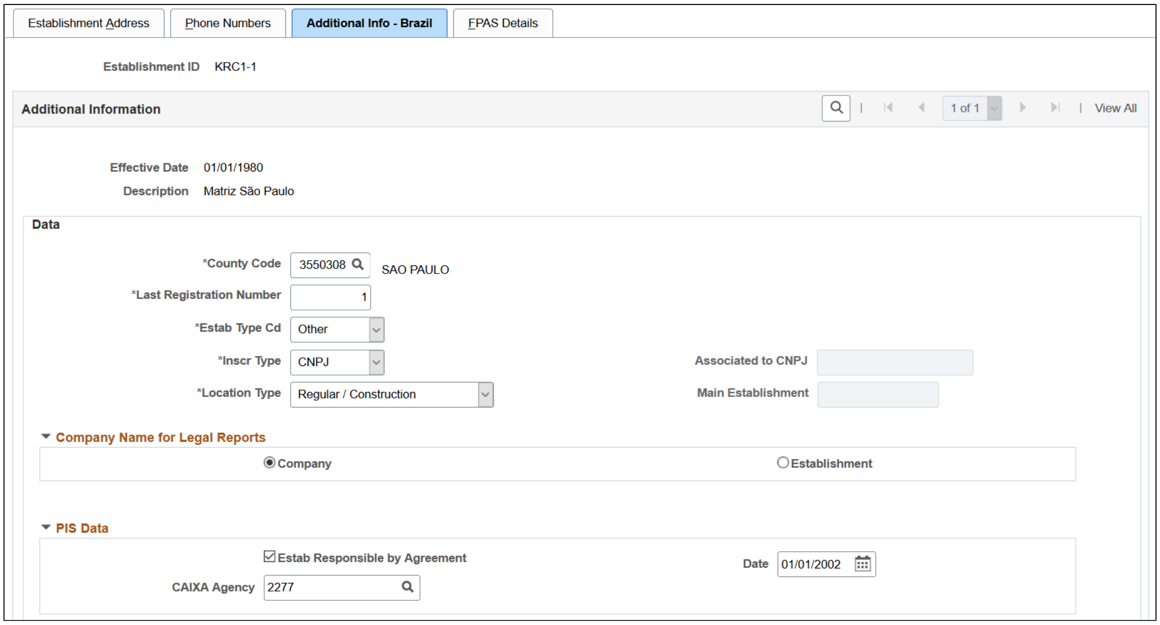
Additional Info - Brazil Page

Use the Additional Info - Brazil (additional information - Brazil) page (ESTAB_TBL_BRA) to enter additional information about the establishment that is specific to the country of Brazil.

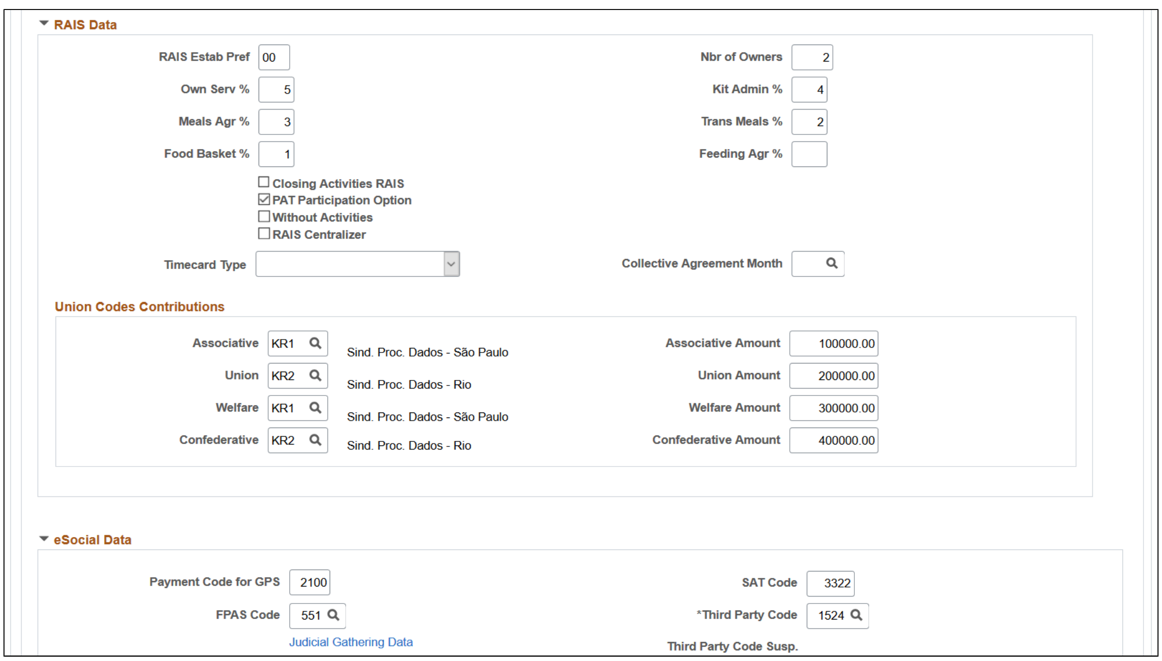
Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Establishment BRA** > **Additional Info - Brazil**

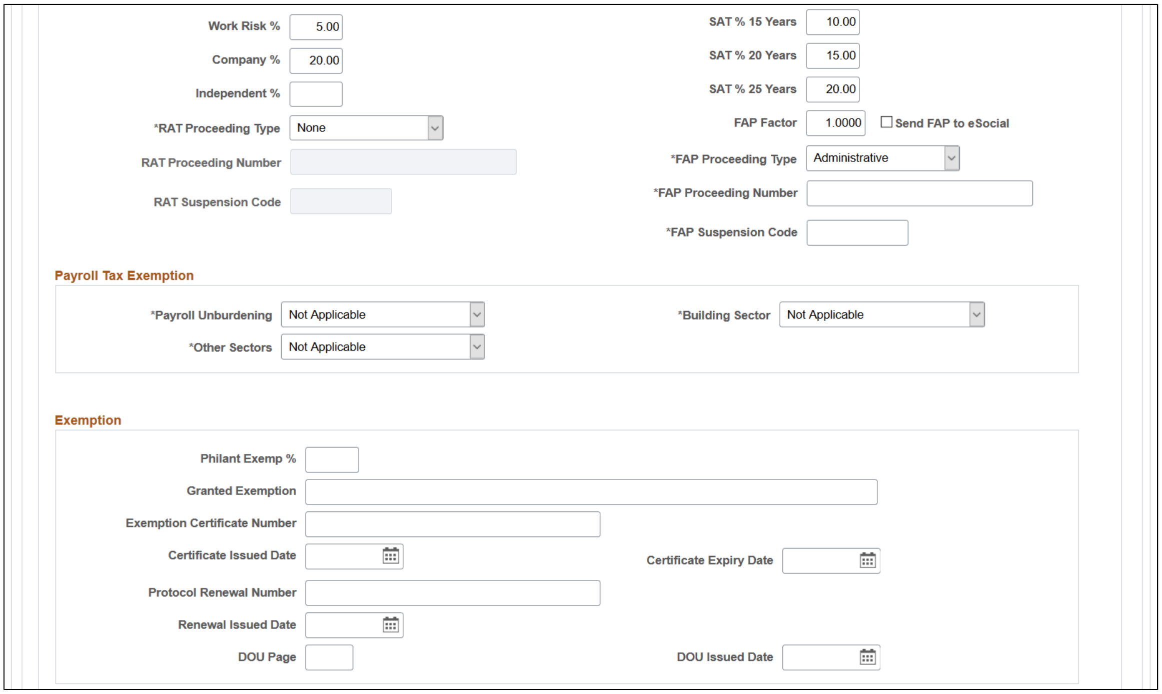
This example illustrates the fields and controls on the Additional Info - Brazil page (1 of 6). You can find definitions for the fields and controls later on this page.



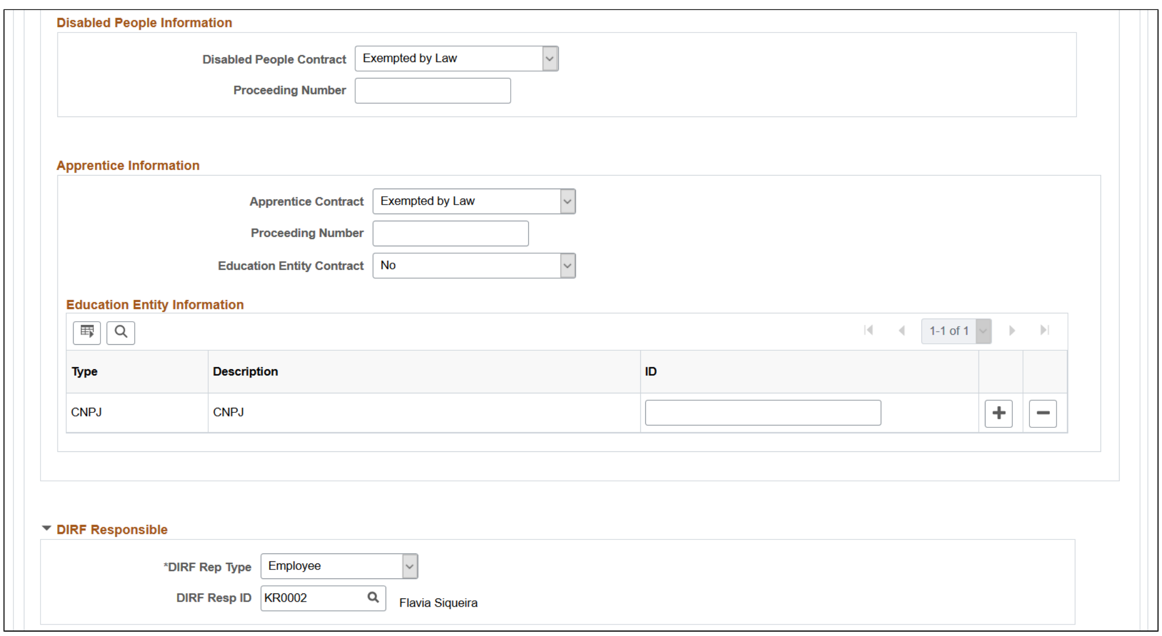
This example illustrates the fields and controls on the Additional Info - Brazil page (2 of 6). You can find definitions for the fields and controls later on this page.



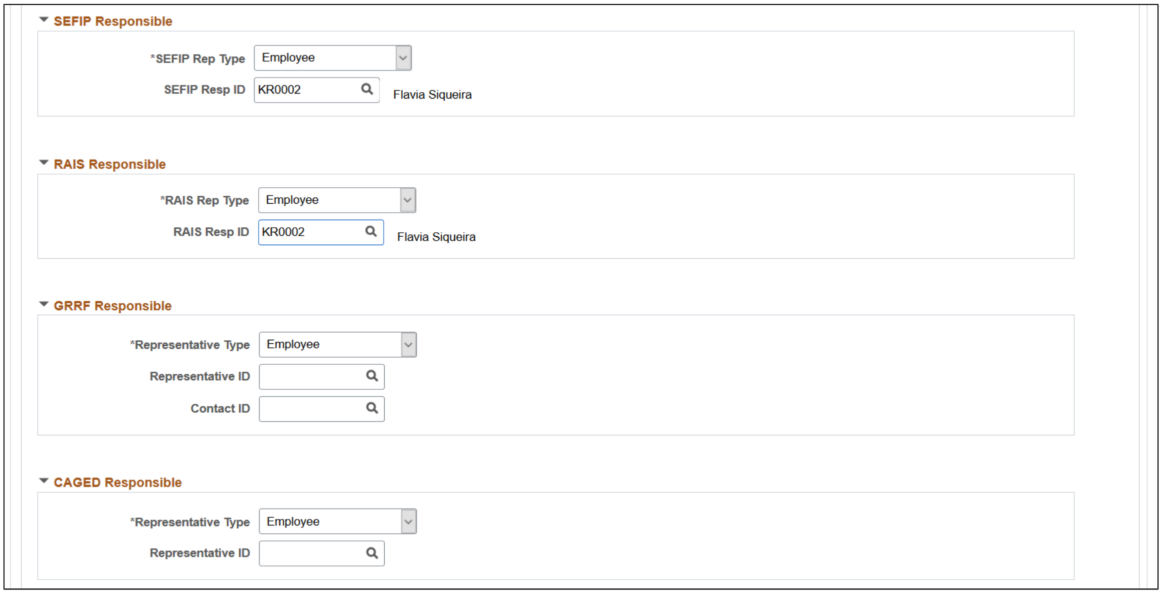
This example illustrates the fields and controls on the Additional Info - Brazil page (3 of 6). You can find definitions for the fields and controls later on this page.



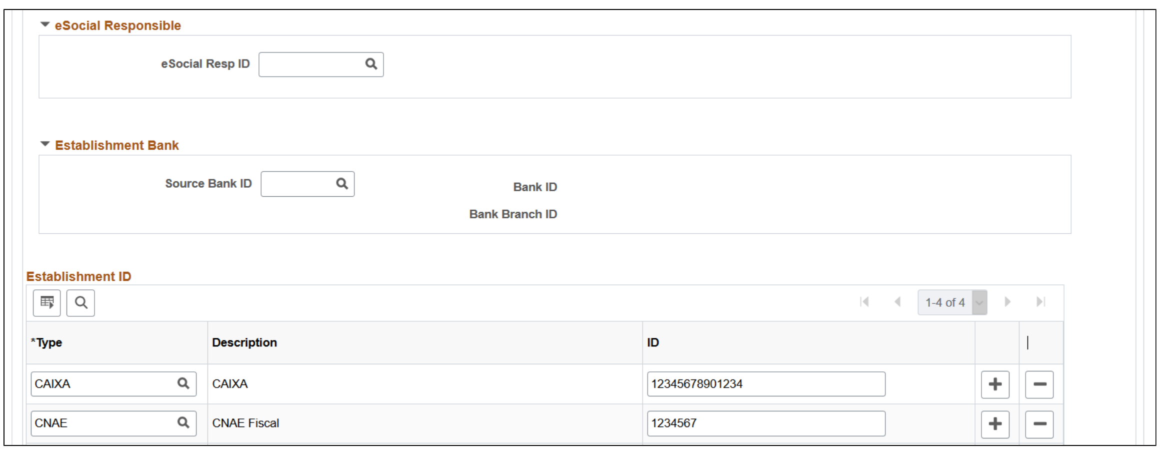
This example illustrates the fields and controls on the Additional Info - Brazil page (4 of 6). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Additional Info - Brazil page (5 of 6). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Additional Info - Brazil page (6 of 6). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
County Code	Enter the county code.
Next Registration Number	Displays the registration number to be assigned to the next employee who is hired, rehired, or transferred to this establishment. The system automatically increments the last registration number value after the current value has been assigned. This field is not available for edit if the associated company is configured to assign and track registration numbers by company instead of establishment on the “Default Settings Page” (Application Fundamentals).

Field or Control	Description
Estab Type Cd (establishment type code)	Select the establishment type code, which is based on the size of the establishment. Values are: *Micro, Other,* and *Small.*
Inscr Type (inscription type)	Select the establishment inscription type. Values are: *CNPJ* or *CEI.*
Associated to CNPJ	Select the CNO owner of the establishment. Establishments that are active for the specified company as of the effective date are available for selection. This field becomes editable when the selected inscription type is *CEI.*
Location Type	Select the type of taxable location that is applicable to the establishment. Values are: *Different FPAS/Third*. Use this option if the establishment has the same CNPJ as another establishment but different FPAS and third party codes. When selected, the Main Establishment field becomes available for edits. *Location Outside Country* *Partial Contract* *Regular/Construction* This data is used in eSocial reporting. **Note:** Only *Regular/Construction* and *Partial Contract* are available for selection, if the **Construction Indicator** field is selected on the “(BRA) Company Details BRA Page” (Application Fundamentals) for the associated company.

PIS Data

Enter information used to generate the Programa de Integração Social (PIS) report.

Field or Control	Description
Estab Responsible by Agreement (establishment responsible by agreement)	When you select this check box, the CAIXA Agency field appears.
Date	The date the Federal Saving Bank generated the TSO file.
CAIXA Agency	Enter the number of the Caixa Economica Federal (Federal Saving Bank) branch that generates the file with the issued resources for the PIS payment of employees (TSO file).

RAIS Data

Enter information used to generate the Relação Anual de Informações Sociais (RAIS) report.

Field or Control	***Description***
RAIS Estab Pref (RAIS establishment prefix)	Enter the prefix only if the establishment register appears for RAIS as a key differentiation. RAIS assigns the establishment prefix.
Nbr of Owners (number of owners)	Enter the number of owners working in the establishment.
Own Serv % (owner service percentage)	Enter the owner service percentage.
Kit Admin % (kitchen administration percentage)	Enter the kitchen administration percentage.
Meals Agr % (meals agreement percentage)	Enter the meals agreement percentage.
Trans Meals % (transported meals percentage)	Enter the transported meals percentage.
Food Basket % (food basket percentage)	Enter the food basket percentage.
Feeding Agr % (feeding tickets agreement percentage)	Enter the feeding tickets agreement percentage.
Closing Activities RAIS	Select to indicate that the establishment closed its activities during the base year (the year for which you are currently reporting). A RAIS report uses this information.
PAT Participation Option (Programa de Alimentação do Trabalhador participation option)	Select to indicate the establishment participates in PAT.
Timecard Type	Select a timecard type. Timecard types are mapped for eSocial reporting on the “Timecard Type Page” (PeopleSoft Global Payroll for Brazil).

eSocial Data

Information entered in this section is used in GPS/SEFIP and eSocial reporting.

Field or Control	***Description***
Payment Code for GPS	Enter the company's social security contribution code. The code is displayed in field #3 on the GPS report.
SAT Code	Enter the work accident insurance code.
FPAS Code	Enter the FPAS (Fundo de Previdência e Assistência Social) social assistance and pension fund code. The activity type of the company determines this code. The system identifies all third parties and their respective percentages assigned to this code and generates a total percentage of collection for the establishment.
Third Party Code	Enter the code of the third-party that collected services from the establishment. The system uses these codes to identify the third parties involved in a specific collection. The SEFIP report uses this code to get the GFIP value.
Judicial Gathering Data	Click to access the Judicial Gathering Data Page to view or enter tax entities and any associated judicial proceeding numbers.
Third Party Code Susp. (third party code suspension)	Displays the sum of entity codes from rows on the FPAS Details Page in which the **Judicial Gathering** field is selected.
Work Risk %	Enter the establishment's identified predominant worth risk percentage. The system uses this percentage to obtain worth risk component of the INSS total amount for collection.
SAT % 15 Years (SAT percentage up to 15 years), **SAT % 20 Years** (SAT percentage up to 20 years), and**SAT % 25 Years** (SAT percentage up to 25 years)	Enter the percentages that apply to only the eligible employees for each case of special retirement (with 15, 20, and 25 years of service). The system uses this percentage to obtain the special retirement component of the INSS total amount for collection.
Company %	Enter the percentage to use to obtain the company component of the INSS total amount for collection.
Independent %	Enter the percentage to use to obtain the independent component of the INSS total amount for collection.

Field or Control	***Description***
Send FAP to eSocial	Select to always print the **FAP Factor** value in the XML files that are generated for the S-1005 event. Select this check box only if you have received an error from eSocial regarding an integration failure with the Government's FAP system, and need to resubmit the event with a FAP factor. Clear to print the **FAP Factor** value in the XML files only if the **FAP Proceeding Type** value is not *None*. The Government does not accept any new FAP factor, unless there is an administrative or judicial proceeding number that authorizes its use. By default, the check box is cleared.
RAT Proceeding Type or **FAP Proceeding Type**	Select the applicable proceeding type for RAT or FAP. By default, the value is set to *None*.
RAT Proceeding Number or **FAP Proceeding Number**	Select or enter the applicable proceeding number for the specified RAT or FAP proceeding type. Proceeding numbers meeting *all* these conditions are available for selection: • Associated with the specified company and proceeding type. • Authored by *Taxpayer*. • Created for *Tax or Tax and FGTS.* **Note:** The field prompt is available for use if the Enabled option is selected on the Adm/Legal Proceedings Parameters BRA Page. Enter the number manually, if the option is not selected. Proceedings are defined on the Administrative/Legal Proceedings BRA Page.
RAT Suspension Code or **FAP Suspension Code**	Select the tax suspension code for the specified proceeding number. Suspension codes meeting the same conditions as the proceeding numbers are available for selection. **Note:** The field prompt is available for use if the Enabled option is selected on the Adm/Legal Proceedings Parameters BRA Page. Enter the code manually, if the option is not selected. See Also Administrative/Legal Proceedings BRA Page.

Payroll Tax Exemption

Information entered in this section is used in eSocial reporting (S-1280 - Complementary Information to Periodic Events).

Field or Control	***Description***
Payroll Unburdening	Select the law that the establishment adheres to on payroll unburdening. Values are: *Company - Current Legislation* *Municipality - Current Legs* *Not Applicable*
Building Sector	Select the unburdening payroll for the building sector. Values are: *Non-Replaced Contribution* *Not Applicable* *Replaced Contribution*
Other Sectors	Select the unburdening payroll for other sectors (industries). Values are: *Fully Replaced* *Not Applicable* *Partially Replaced*

Exemption

Field or Control	***Description***
Philant Exemp % (philanthropy exemption percentage)	Enter the percentage to use to obtain the philanthropy exemption component of the INSS total amount for collection.
Granted Exemption	Enter the granted exemption. The maximum length of this field is 70 characters.

Disabled People Information

Field or Control	*Description*
Disabled People Contract	Select the type of contract for disabled employees. Values are: *Exempted by Judicial Process* *Exempted by Law* *Mandatory* *Not Applicable*. When selected, the **Proceeding Number** field is not editable.
Proceeding Number	Enter an applicable proceeding number.

Apprentice Information

Field or Control	*Description*
Apprentice Contract	Select the type of contract for apprentices. Values are: *Exempted by Judicial Process* *Exempted by Law* *Mandatory* *Not Applicable*. When selected, both **Proceeding Number** and **Education Entity Contract** fields are not editable.
Proceeding Number	Enter an applicable proceeding number. This value is required if the selected apprentice contract is *Exempted by Judicial Process*.
Education Entity Contract	Indicate if this is an education entity contract. By default, the value is set to *No*. If yes, you must enter a CNPJ ID in the **Education Entity Information** section.

Education Entity Information

Specify a CNPJ ID in this section if the **Education Entity Contract** field is set to *Yes*.

DIRF Responsible

Complete this group box only for Declaração de Informações à Receita Federal (DIRF) centralizing establishments.

Field or Control	***Description***
DIRF Rep Type (DIRF representative type)	Select whether the party responsible for generating the DIRF file is a *Company, Employee,* or *Non Empl* (non-employee).
DIRF Resp ID (DIRF responsible ID)	Enter the company code or employee ID of the party responsible for generating the DIRF file.

SEFIP Responsible

Field or Control	***Description***
SEFIP Rep Type (SEFIP representative type)	Select whether the party responsible for generating the SEFIP file is a *Company, Employee,* or *Non Empl* (non-employee).
SEFIP Resp ID (SEFIP responsible ID)	Enter the company code or employee ID of the party responsible for generating the SEFIP file.

RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

Field or Control	***Description***
RAIS Rep Type (RAIS representative type)	Select whether the party responsible for generating the RAIS file is a *Company, Employee,* or *Non Empl* (non-employee).
RAIS Resp ID (RAIS responsible ID)	Enter the company code or employee ID of the party responsible for generating the RAIS file.

GRRF Responsible

Field or Control	***Description***
Representative Type	Select whether the party responsible for generating the GRRF file is a *Company, Employee,* or *Non Empl* (non-employee).

Field or Control	***Description***
Representative ID	Enter the company code or employee ID of the party responsible for generating the GRRF file.

CAGED Responsible

Field or Control	***Description***
Representative Type	Select whether the party responsible for generating the CAGED file is a *Company, Employee,* or *Non Empl* (non-employee).
Representative ID	Enter the company code or employee ID of the party responsible for generating the CAGED file.

eSocial Responsible

Field or Control	***Description***
eSocial Resp ID (eSocial Representative ID)	Enter the employee ID of the party responsible for generating eSocial reports.

Establishment Bank

Field or Control	***Description***
Source Bank ID	Enter the establishment's ID.

Establishment ID

Field or Control	***Description***
Type	Enter an establishment ID type. **Important!** If the establishment is set as a headquarter for its company (the **Headquarters Unit** field is selected on the Establishment Address page), be sure to specify the CNPJ number of the company to support eSocial processing.

Field or Control	***Description***
ID	Enter the establishment's ID.

Related Links

“Establishment Address Page” (Application Fundamentals)

“Establishment - Phone Numbers Page” (Application Fundamentals)

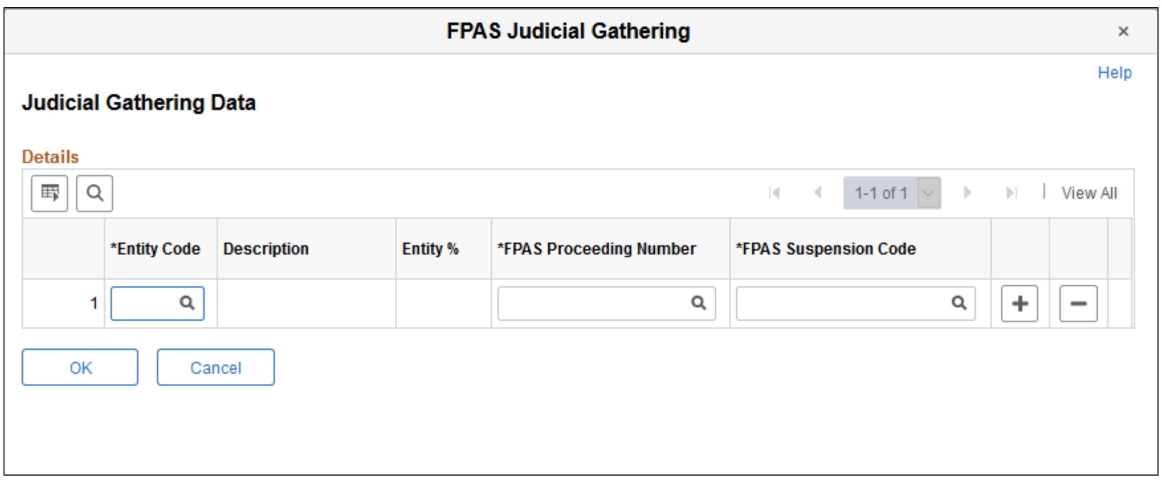
Judicial Gathering Data Page

Use the Judicial Gathering Data page (FPAS_JUD_C_BRA_SEC) to enter tax entities and any associated judicial proceeding numbers and FPAS suspension codes.

Navigation:

Click the Judicial Gathering Data link on the Additional Info - Brazil page.

This example illustrates the fields and controls on the Judicial Gathering Data page.



Use this page to enter tax entities for the establishment. If the entity is associated with a judicial proceeding that provides the establishment a tax exemption at the specified percentage, you can specify the proceeding number here. Field prompts are available to the **FPAS Proceeding Number** and **FPAS Suspension Code** fields, if the Administrative and Legal Proceedings functionality is enabled on the Adm/Legal Proceedings Parameters BRA Page.

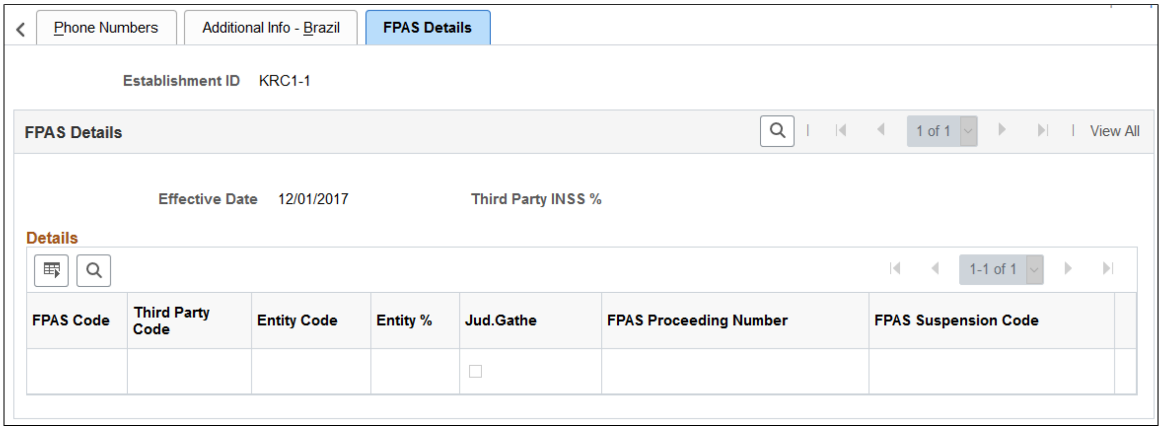
FPAS Details Page

Use the FPAS Details page (FPAS_ENT_BRA_DET) to review FPAS information for establishments.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Establishment BRA** > **FPAS Details**

This example illustrates the fields and controls on the FPAS Details page.



This page lists the FPAS codes that are associated with the establishment.

See Also Judicial Gathering Data Page

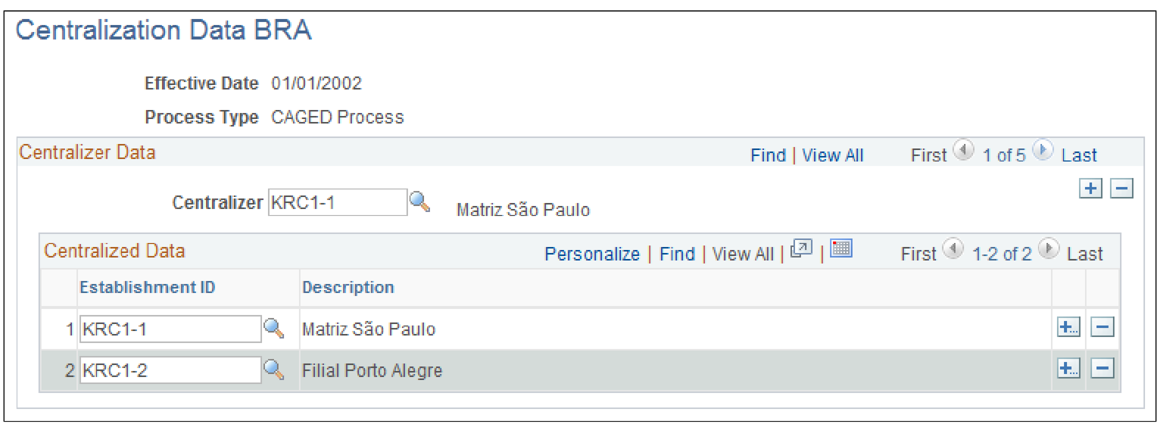
Centralization Data BRA Page

Use the Centralization Data BRA page (CENTRALIZATION_BRA) to group establishments to obtain centralized data for multiple reports such as SEFIP and CAGED.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Centralization Data BRA > Centralization Data BRA

This example illustrates the fields and controls on the Centralization Data BRA page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Process Type	When you add a record, select the type of data that you want to centralize, such as SEFIP or CAGED.

Field or Control	*Description*
Centralizer	Enter the name of the establishment that creates centralized data for reporting purposes.
Establishment ID	Enter the IDs of all establishments whose data the centralizer collects.

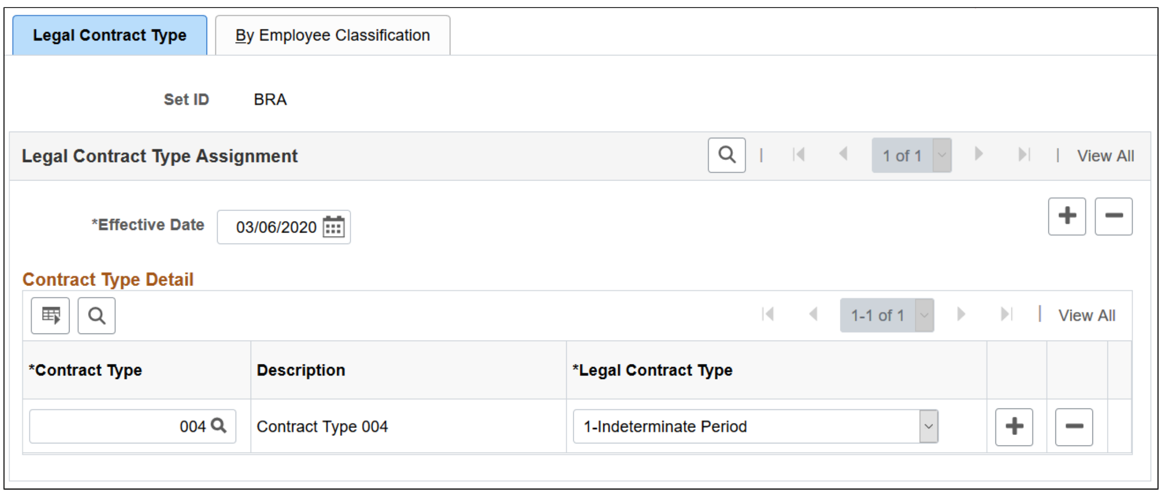
Legal Contract Type Page

Use the Legal Contract Type page (CNT_TYPE_BRA) to associate contract types with legal contract types.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BRA** > **Legal Contract Type** > **Legal Contract Type**

This example illustrates the fields and controls on the Legal Contract Type page.



Use this page to associate contract types of your workforce that are defined on the Define Contract Types Page or Contract Types for Regulations Page with available legal contract types.

The system uses this information to identify the legal contract type of contracts (available on the Job Information Page), and populates the information on the (BRA) Additional Contract Data Page for workers.

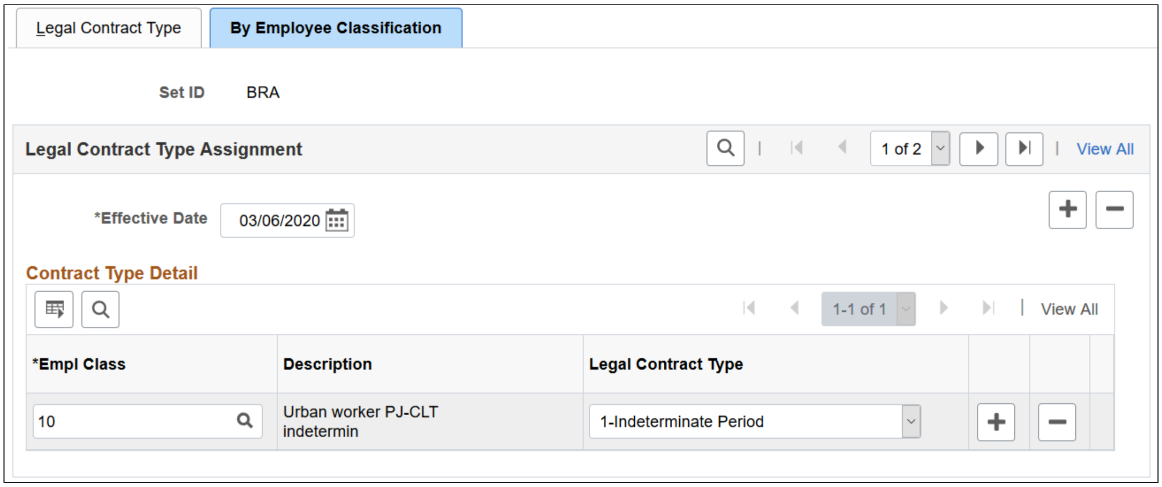
By Employee Classification Page

Use the By Employee Classification page (CNT_TYPE_EC_BRA) to associate employee classes with legal contract types.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BRA** > **Legal Contract Type** > **By Employee Classification**

This example illustrates the fields and controls on the Employee Classification page.



Use this page to associate employee classes that are defined on the Employee Class page with available legal contract types.

As an alternative to the Legal Contract Type page, the system uses this information to identify the legal contract type of contracts (available on the Job Information Page), and populates the information on the (BRA) Additional Contract Data Page for workers.

Related Links

Defining Additional Employment Setup Data

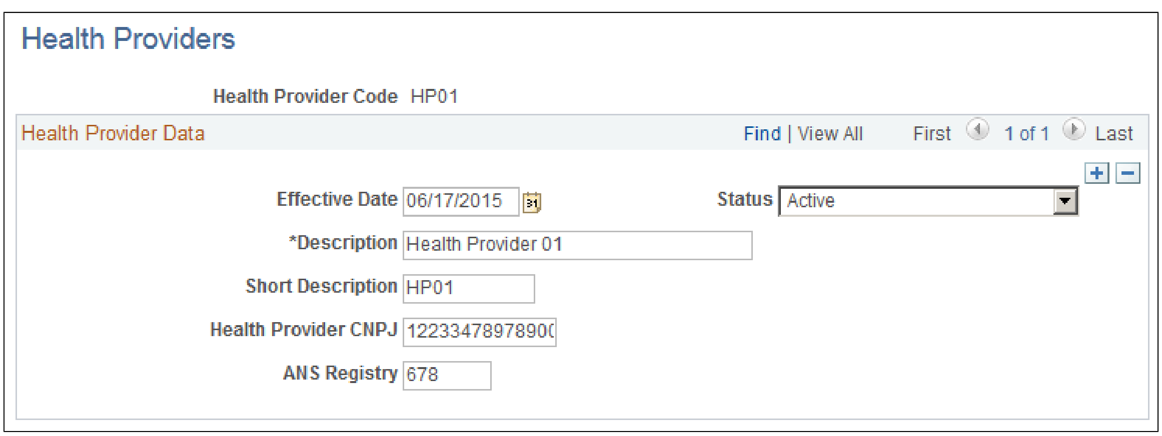
Health Providers Page

Use the Health Providers page (HEALTH_PROV_BRA) to define health providers.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BRA** > **Health Providers** > **Health Providers**

This example illustrates the fields and controls on the Health Providers page.



Use this page to define health providers for use in the system. Health providers are referenced on the "DIRF Parameters BRA Page" (PeopleSoft Global Payroll for Brazil) to generate DIRF reports.

Field or Control	***Description***
Health Provider Code	Displays the code that identifies the health provider in the system. The maximum length of this code is 10 characters.
Health Provider CNPJ	Enter the 14-digit CNPJ (Cadastro Nacional da Pessoa Jurídica), National Registry of Legal Entities, of the health provider.
ANS Registry	Enter the ANS registry code of the health provider.

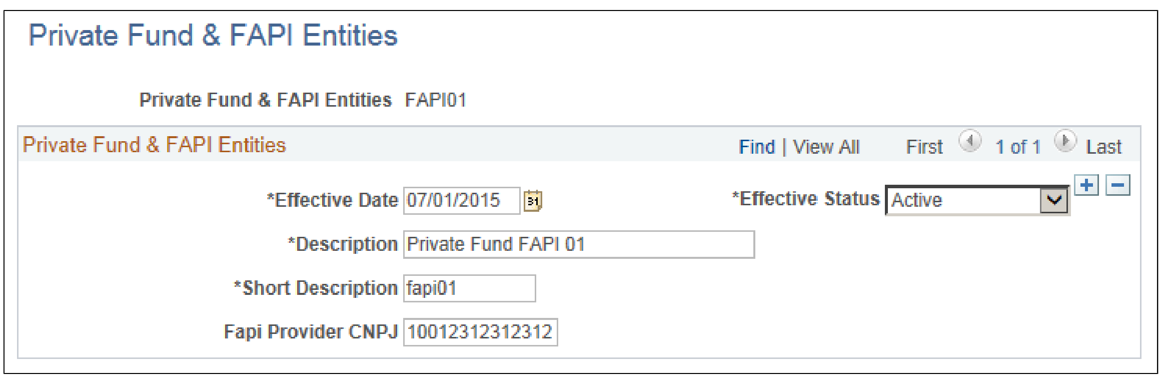
Private Fund & FAPI Entities Page

Use the Private Fund & FAPI Entities page (FAPI_PROV_BRA) to specify private pension funds and associated CNPJ numbers.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BRA** > **Private Fund and FAPI Entities** > **Private Fund & FAPI Entities**

This example illustrates the fields and controls on the Private Fund & FAPI Entities page.



Use this page to specify private funds and FAPI entities that can be referenced on the "IREN Parameters BRA Page" (PeopleSoft Global Payroll for Brazil).

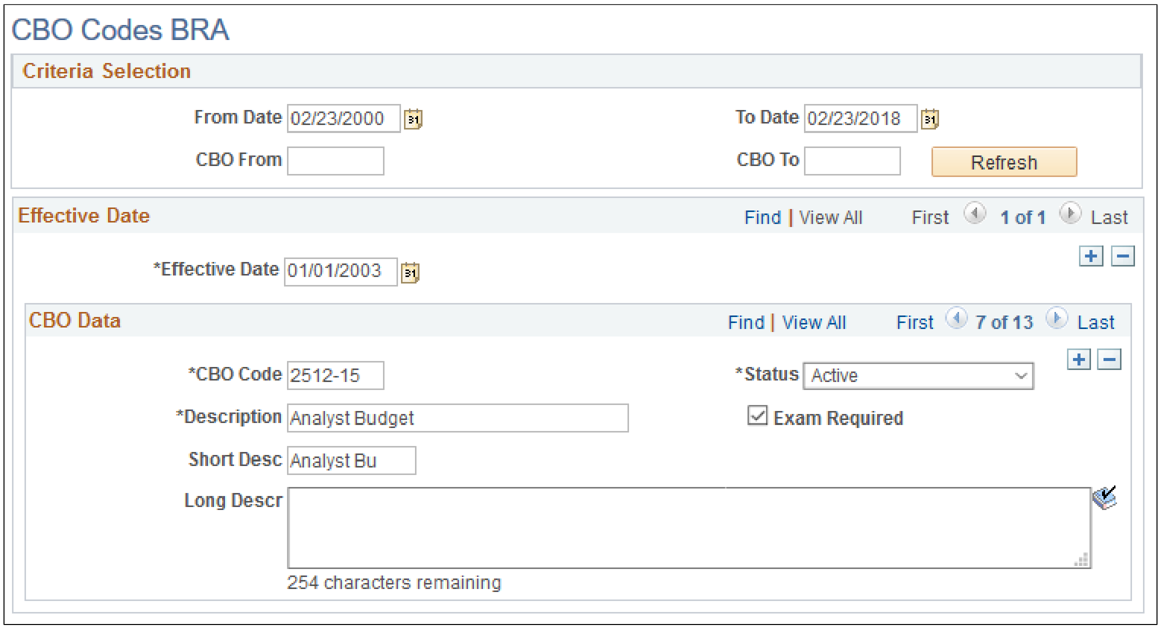
CBO Codes BRA Page

Use the CBO Codes BRA page (CBO_CD_TBL_BRA) to define occupation codes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **CBO Codes BRA** > **CBO Codes BRA**

This example illustrates the fields and controls on the CBO Codes BRA page.



Codes effective before December 31, 2002 were in the format *99999*. Codes effective from January 1, 2003 onward are in the format *9999–99*.

Refer to the official website (http://www.mtecbo.gov.br) for a list of CBOs (Brazilian Code of Occupation).

Field or Control	***Description***
Exam Required	Select to indicate that drug test is required for this CBO code and occupation.

Related Links

“Job Code Profile Page” (Application Fundamentals)
Understanding the CAGED Report
“S-2221 - Toxicological Exam for Professional Drivers” (PeopleSoft Global Payroll for Brazil)

City Codes BRA Page

Use the City Codes BRA page (CITY_CODES_BRA) to define city codes by state.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **City Codes BRA** > **City Codes BRA**

This example illustrates the fields and controls on the City Codes BRA page.

Related Links

“Understanding Events” (PeopleSoft Global Payroll for Brazil)

“Generating the RAIS Report” (PeopleSoft Global Payroll for Brazil)

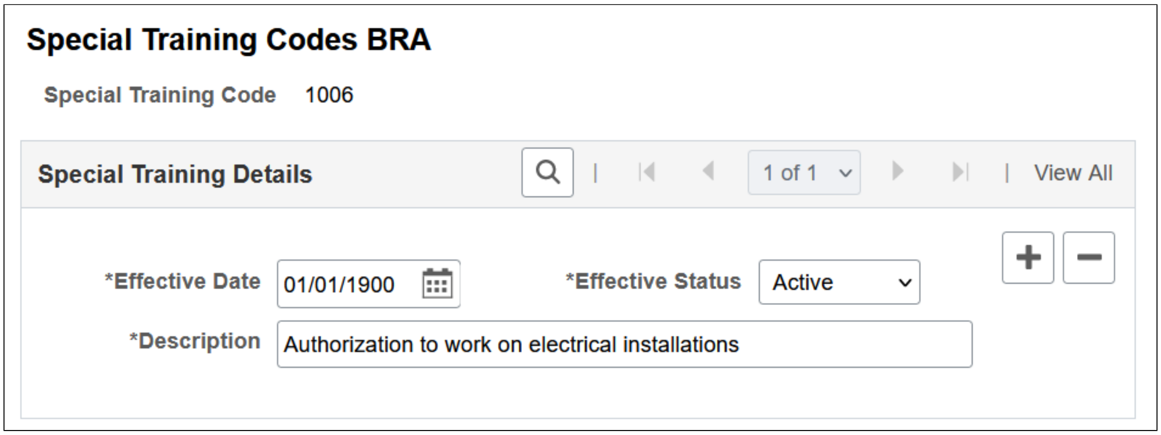
Special Training Codes BRA Page

Use the Special Training Codes BRA page (SPECIAL_TRAIN_BRA) to define special training codes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Special Training Codes BRA** > **Special Training Codes BRA**

This example illustrates the fields and controls on the Special Training Codes BRA page.



The system prepopulates this component with special training codes from table 28 in eSocial. Do not add any codes that are not supported in eSocial.

These codes are used in recording special training for employees on the (BRA) Training/Capacity Building BRA Page.

Related Links

"Understanding Events" (PeopleSoft Global Payroll for Brazil)

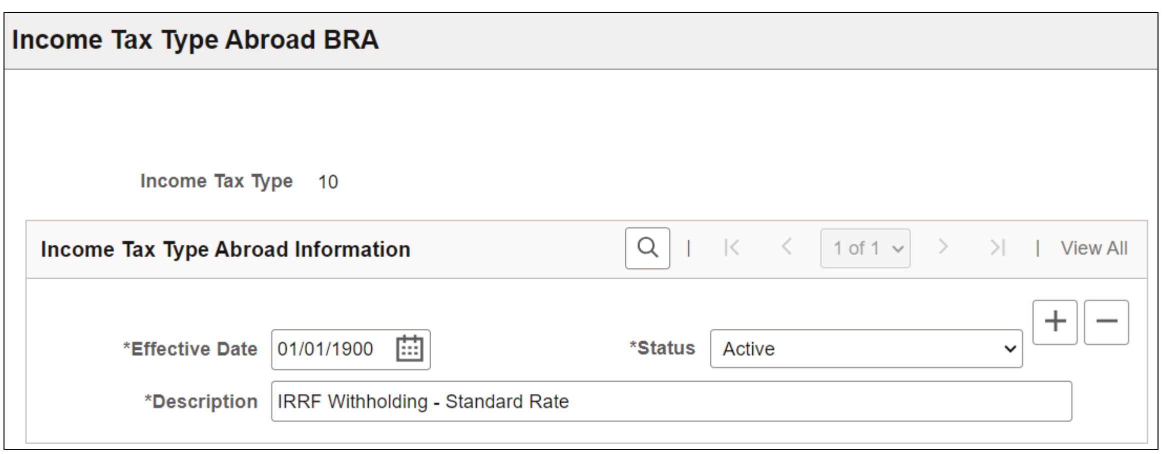
Income Tax Type Abroad BRA Page

Use the Income Tax Type Abroad BRA page (INC_TAX_TYPE_BRA) to define income tax type codes for employees living abroad.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Income Tax Type Abroad BRA** > **Income Tax Type Abroad BRA**

This example illustrates the fields and controls on the Income Tax Type Abroad BRA page.



The system prepopulates this component with income tax type codes from table 30 in eSocial. Do not add any codes that are not supported in eSocial.

These codes are used in recording the income tax type for employees living aboard on the (BRA) Personal Information BRA Page.

(CHN) Setting Up Hukou Data

To set up Hukou data, use the Hukou Setup CHN (HUKOU_SETUP_CHN) component.

These topics discuss how to set up Hukou data.

Pages Used to Set Up Hukou Data

Page Name	***Definition Name***	***Usage***
Hukou Type Page	HUKOU_DTL_TYPE_CHN	Set up Hukou types.
Hukou Location Page	HUKOU_DTL_LOC_CHN	Set up Hukou locations.

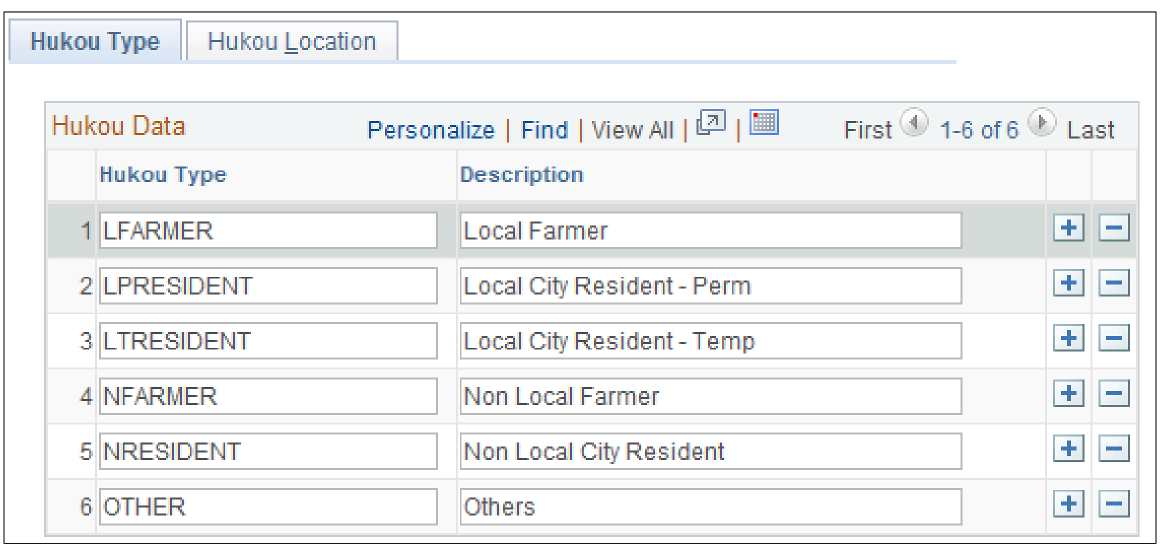
Hukou Type Page

Use the Hukou Type page (HUKOU_DTL_TYPE_CHN) to set up Hukou types.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Hukou Setup CHN** > **Hukou Type**

This example illustrates the fields and controls on the Hukou Type page. You can find definitions for the fields and controls later on this page.



Use this page to review and update Hukou types and their descriptions.

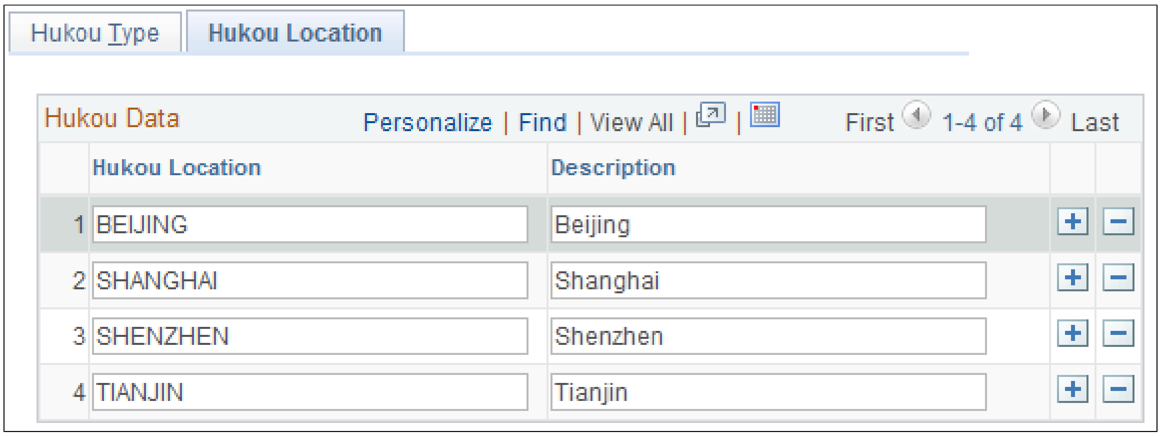
Hukou Location Page

Use the Hukou Location page (HUKOU_DTL_LOC_CHN) to set up Hukou locations.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Hukou Setup CHN > Hukou Location

This example illustrates the fields and controls on the Hukou Location page. You can find definitions for the fields and controls later on this page.



Use this page to review and update Hukou locations and their descriptions.

(ARG) Setting Up Argentinian Workforce Tables

This topic discusses how to set up Argentinian workforce tables.

Pages Used to Set Up Argentinian Workforce Tables

Page Name	***Definition Name***	***Usage***
Court Numbers Page	COURT_NBR_ARG	Define court numbers to be used when entering family dependents data.
Secretary Numbers Page	SECRETARY_NBR_ARG	Define secretary numbers to be used when entering family dependents data.

Court Numbers Page

Use the Court Numbers page (COURT_NBR_ARG) to define court numbers to be used when entering family dependents data.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ARG > Court Numbers

This example illustrates the fields and controls on the Court Numbers page.

Use this page to specify 4-digit court numbers and their corresponding descriptions. The system delivers a list of court numbers that are ready for use when you enter family dependents data for employees on the Dependent Information - Personal Profile Page.

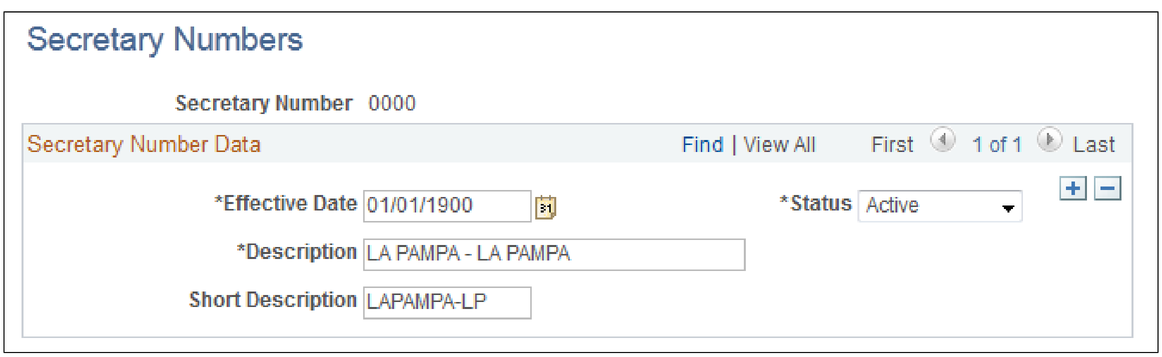
Secretary Numbers Page

Use the Secretary Numbers page (SECRETARY_NBR_ARG) to define secretary numbers to be used when entering family dependents data.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data ARG > Secretary Numbers

This example illustrates the fields and controls on the Secretary Numbers page.



Use this page to specify 4-digit secretary numbers and their corresponding descriptions. The system delivers a list of secretary numbers that are ready for use when you enter family dependents data for employees on the Dependent Information - Personal Profile Page.

Chapter 5

Managing Workforce Administrator Tasks Using Fluid

Managing HR Administration Tasks as an Administrator Using Fluid

This topic lists the pages that HR administrators can access from a single location in the PeopleSoft Fluid User Interface to perform HR administration-related transactions.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Manage HR Administration Tasks as an Administrator Using Fluid

Page Name	***Definition Name***	***Usage***
HR Administration Tile	_AUTOGEN_NAVCOLL_8 (cref for the tile) HC_HR_ADMIN_FL (this is the cref for the tile)	Access a collection of frequently-used HR administrative components.
Job Data Page	JOB_DATA1	View or update the job record of an employee, contingent worker, or POI. For more information, see Understanding Job Data and (Classic) Adding Organizational Instances.
Workforce Job Summary Page	WF_JOB_SUMMARY	View an employee's job history.
“Person Profile Page” (PeopleSoft Human Resources Manage Profiles)	JPM_PROFILE_PERS	Create and update person profiles.
Headcount Movement Pivot Grid	PTPG_PGVIEWER	Analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time.

Page Name	***Definition Name***	***Usage***
Current Headcount Pivot Grid	PTPG_PGVIEWER	View the distribution of the organizational population. Administrators can view this information for employees, contingent workers, and persons of interest based upon the current job effective dated rows. Managers can view the distribution of the organizational population by job code based upon the current job effective dated rows.
Workforce Turnover Page	PTPG_NUI_VWR	Identify areas within the organization with the highest turnover.
Record Disciplinary Actions Page	DISCIPLINARY_ACTN	Document incidents that led to a disciplinary action against a worker. For more information, see "Tracking Disciplinary Actions" (PeopleSoft Human Resources Manage Labor Administration).
"HR Notification Page" (Application Fundamentals)	HCSC_NOTIF_ADHOC	Compose and send notifications. **Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications. Notifications delivered with HCM Image 47 or later must use Notification Composer. For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).
"Business Unit Page" (Application Fundamentals)	BUS_UNIT_TBL_HR	Add or update business units.
Company Page	COMPANY_TABLE1	Define and describe companies. For more information, see "Entering Company Information" (Application Fundamentals).

Page Name	***Definition Name***	***Usage***
Location Page	LOCATION_TABLE1	Enter physical locations for your organization, such as corporate headquarters, branch offices, and remote sales offices. For more information, see “Establishing Locations” (Application Fundamentals).
Department Page	DEPARTMENT_TBL_GBL	Define basic information about a department. For more information, see “Maintaining Departments” (Application Fundamentals).
Add/Update Position Info Page	POSITION_DATA1	Create and manage positions for your organization. For more information, see “Creating Positions” (PeopleSoft Human Resources Manage Positions).
Job Code Page	JOBCODE_TBL1_GBL	Add new job codes to the system and define job family, compensation, and regulatory information for each job code. For more information, see “Classifying Jobs” (Application Fundamentals).
Dotted Line Page	HR_DTLN_FL	View a list of dotted line reports already created in the system, and create or delete dotted line relationships.
Export Org Chart Page or Export Organization Chart Page	HRCD_ORG_EXP_FL	Export the organizational chart to an Excel or Visio file as the HR administrator.
OnBoarding Installation Page	HR_OBD_INSTALL	Identify the information that should be used support notification and access to the OnBoarding data.
Document Groups Page	HR_OBD_DOC_GRP	Define document groups for organizing your documents.
Configure Documents - Documents Page	HR_OBD_CFG_DOC	Set up document configuration for activity guides (i.e. OnBoarding and OffBoarding), such as the types of documents to view or upload, if an employee needs to take action on the document, and attach documents.
Configure Documents - Templates Page	HR_OBD_CFG_DOC_TMP	Identify which templates should display this document

Page Name	***Definition Name***	***Usage***
Employee Documents Page	HR_OBD_EMP_DOCS	View the documents that workers have acknowledged or uploaded
Manage OnBoarding Event Page	HR_OBD_EMP_TMPLS	Add a trigger for a person who is missing a job assignment trigger.
OnBoarding Status Page (for Administrators)	HR_OBD_STATUS_FL	Review the OnBoarding status of workers as an administrator.
OffBoarding Installation Page	HR_OFB_INSTALL	Identify the OffBoarding category, participants, and template assignment settings.
Manage OffBoarding Event Page	HR_OFB_MNG_EVENT	Add an OffBoarding trigger for a person who is missing a trigger or correct an incorrect template assignment.

HR Administration Tile

Administrators use the HR Administration tile to access a collection of frequently-used HR administrative components.

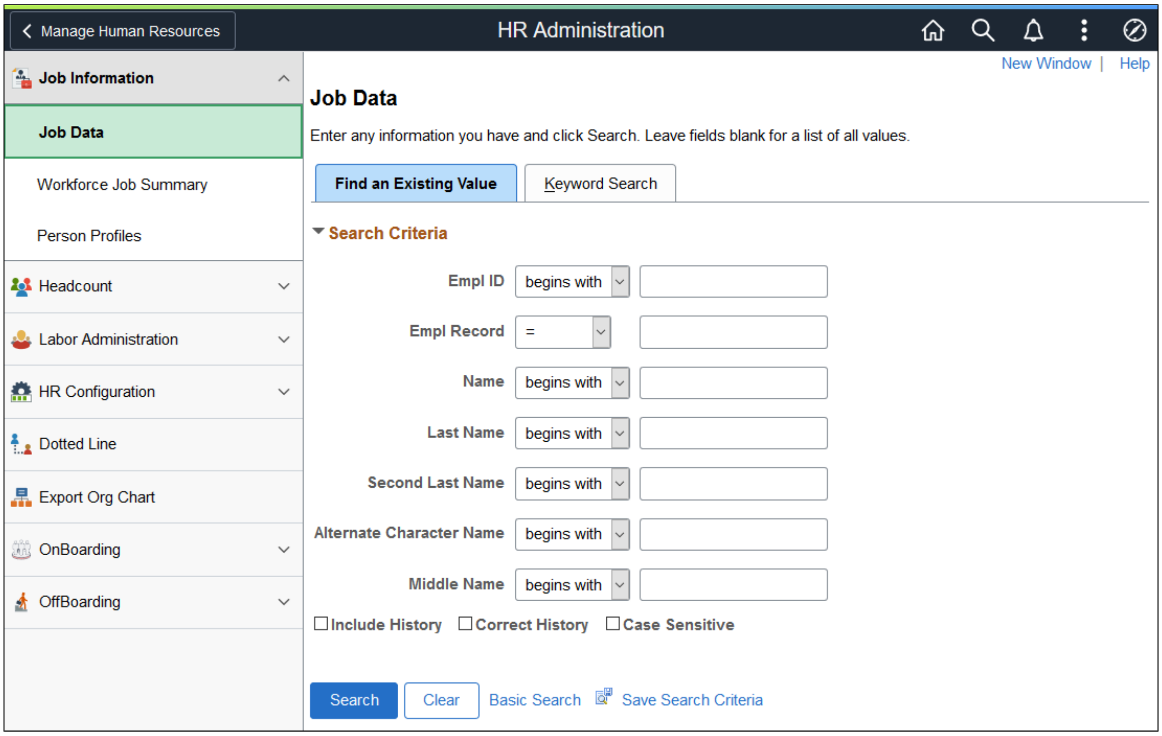
Navigation:

The HR Administration tile is delivered as part of the "Workforce Administrator Homepage" (Application Fundamentals) and Manage Human Resources Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

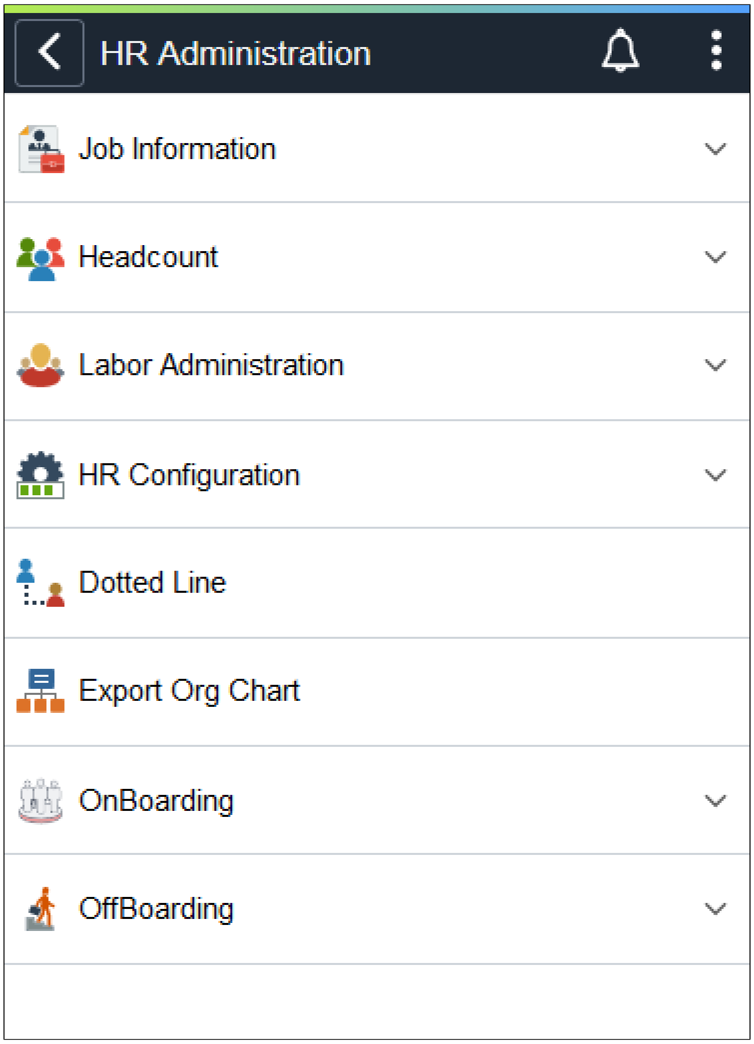
This example illustrates the HR Administration tile.

Click the HR Administration tile to access the HR Administration application start page.

This example illustrates the HR Administration application start page for the tablet.



This example illustrates the HR Administration application start page for the smartphone.



This application start page is a navigation collection that enables administrators to access frequently-used HR administration components from one location.

The application start page lists the components collected under these categories:

- Job Information
- Headcount
- Labor Administration
- HR Configuration
- Dotted Line
- Export Org Chart
- OnBoarding
- OffBoarding

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

For small form factor devices, the application start page displays the categories and components. Select a component item to have the system take you to that component. Use the back button to return to the HR Administration application start page to select a new component.

Viewing Workforce Insight Reports as an HR Administrator Using Fluid

PeopleSoft Pivot Grid is a PeopleTools technology that provides operational dashboard reporting. Pivot grids are self-service, multi-dimensional analytics built into the applications that provide users with improved analytic capabilities and the business intelligence needed to make informed decisions.

HR administrators can leverage this functionality using the Workforce Insight dashboard to streamline the process of viewing and analyzing workforce data. Workforce Insight delivers a number of pivot grids and Insights visualizations to provide quick, real-time reporting capabilities to administrators from a single location using the PeopleSoft Fluid User Interface. By default, the dashboard displays data in charts, but users can easily change the display options and view information in a grid format.

The pivot grids include analytics for headcount, workforce turnover, diversity, education level, and position status reporting. HR analytics also leverages the PeopleTools 8.57 Personalized Analytics Notification feature to notify the HR administrator when the organization’s status falls below the recommended threshold.

The Workforce Insight dashboard also provides access to tiles and dashboards that display workforce equity and composition analytics for your organization using PeopleSoft Insights.

This topic provides an overview of the Workforce Insight pivot grids, layout and common elements, and discusses the Workforce Insight reports.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

The following videos provide an overview of workforce analytics for the HR administrator:

Video: Image Highlights, PeopleSoft HCM Update Image 29: Analytics for the HR Administrators

Video: PeopleSoft HR Workforce Insight Analytics

Pages Used to View Workforce Insight Reports as an Administrator Using Fluid

Page Name	***Definition Name***	***Usage***
Refresh Analytics Data Page	RUN_CNTL_HR_PG	Run the process to extract and populate data for the analytics reports.

Page Name	***Definition Name***	***Usage***
Workforce Insight Tile	HC_HR_WORKFORCE_INSIGHT_FL (this is the cref for the tile)	Access a collection of frequently-used analytic reports for workforce administration.
Workforce Insight Dashboard	PT_LANDINGPAGE	Select from a collection of frequently used administrator analytic reports.
Current Headcount Tile Current Headcount Page	HC_HR_PG_CURRNT_MGR_FL (this is the cref for the tile) PTPG_NUI_VWR	View the distribution of the organizational population by employees, contingent workers, and persons of interest based upon the current job effective dated rows.
Headcount Movement Tile Headcount Movement Page	HC_HR_PG_MOVMNT_MGR_FL (this is the cref for the tile) PTPG_NUI_VWR	Analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time.
Workforce Turnover Tile Workforce Turnover Page	HC_HR_PG_WF_TRNOVR_ADM_FL (this is the cref for the tile) PTPG_NUI_VWR	Identify areas within the organization with the highest turnover.
Highest Education Tile Highest Education Page	HC_HR_PG_ED_LVL_ADM_FL (this is the cref for the tile) PTPG_NUI_VWR	View the highest level of education completed by your workforce.
Diversity Overview Tile Diversity Overview Page	HC_HR_PG_WF_DIV_ADM_FL (this is the cref for the tile) PTPG_NUI_VWR	View the workforce by several diversity types at once (age, disability, ethnicity, gender, and veteran status).
Workforce Equity Tile Workforce Equity Dashboard	HC_WORKFORCE_EQUITY (this is the cref for the tile) KIBANA_COMP (this is the cref for the dashboard) PTSF_KIBANA_COMP	Access and view HR workforce equity reports that are based on diversity and compensation using PeopleSoft Insights. For example, view employee data by job code, gender, ethnic group, compa-ratio information, and country.
Workforce Composition Tile Workforce Composition Dashboard	HC_WORKFORCE_COMP_FL (this is the cref for the tile) KIBANA_COMP (this is the cref for the dashboard) PTSF_KIBANA_COMP	Access Insights visualizations related to employee number counts throughout your organization based on your row level security.

Page Name	***Definition Name***	***Usage***
Diversity Analysis Tile Diversity Analysis Page	HC_HR_PG_WF_DIV_TYPE_ADM_FL (this is the cref for the tile) PTPG_NUI_VWR	Review the employee distribution percentage for one diversity type at a time.
Position Status Tile Position Status Page	HC_HR_PG_POS_STATUS_ADM_FL (this is the cref for the tile) PTPG_NUI_VWR	View vacant positions within the organization by approved or frozen status.
(Desktop or Tablet) View Grid - <Pivot Grid> Page	PTPG_GRIDVIEWERNUI	View a summary of data counts and select specific values to view the details in grid format.
<Pivot Grid> (Detail) Page	PTPG_NUI_DETAIL	View details of specific data in the grid format.
Update Filters Page	PTPG_NUI_FACETUPD	Add or remove filters to be available for use in the pivot grid model.
Chart Options Page	PTPG_NUI_CHTOPT	Define the display settings for the chart titles and axes.
Threshold Personalization Page	PTPG_NUI_THOLD_PER	Configure the threshold levels and options for a pivot grid.

Understanding Workforce Insight Pivot Grids

PeopleSoft Pivot Grid is a PeopleTools technology that provides operational analytics using charts and grids. Pivot grids enable users to visually display real-time data and organize it on the fly by pivoting and filtering. The self-service, multi-dimensional analytics provided by PeopleSoft Pivot Grid provides users with the business intelligence needed to make informed decisions.

The Workforce Insight dashboard delivers these pivot grids that provide graphic views of important workforce measures:

Term	***Definition***
Current Headcount	Enables administrators to compare the distribution of the organizational population by employee, contingent worker, and persons of interest, based upon current job effective dated rows.
Headcount Movement	Shows all job actions that occurred during the specified reporting period (the default chart renders the latest 12 months).

Term	*Definition*
Workforce Turnover	Identifies areas within the organization with the highest turnover.
Highest Education Level	Charts the highest education levels obtained by your employees by company, location, department, and job code.
Diversity Overview	Provides administrators the ability to view the workforce by several diversity types at once (age, disability, ethnicity, gender, and veteran status), or drill down for a closer look at a specific diversity type. Counts each included employee just once, regardless of how many jobs a person may hold.
Diversity Analysis	Shows the employee distribution percentage for one diversity type at a time and provides filters so you can change which diversity type is displayed.
Position Status	Enables administrators to view vacant positions within the organization by approved or frozen status.

For more information on the setup and capabilities of PeopleSoft Pivot Grid, see the PeopleTools: *Pivot Grid* documentation.

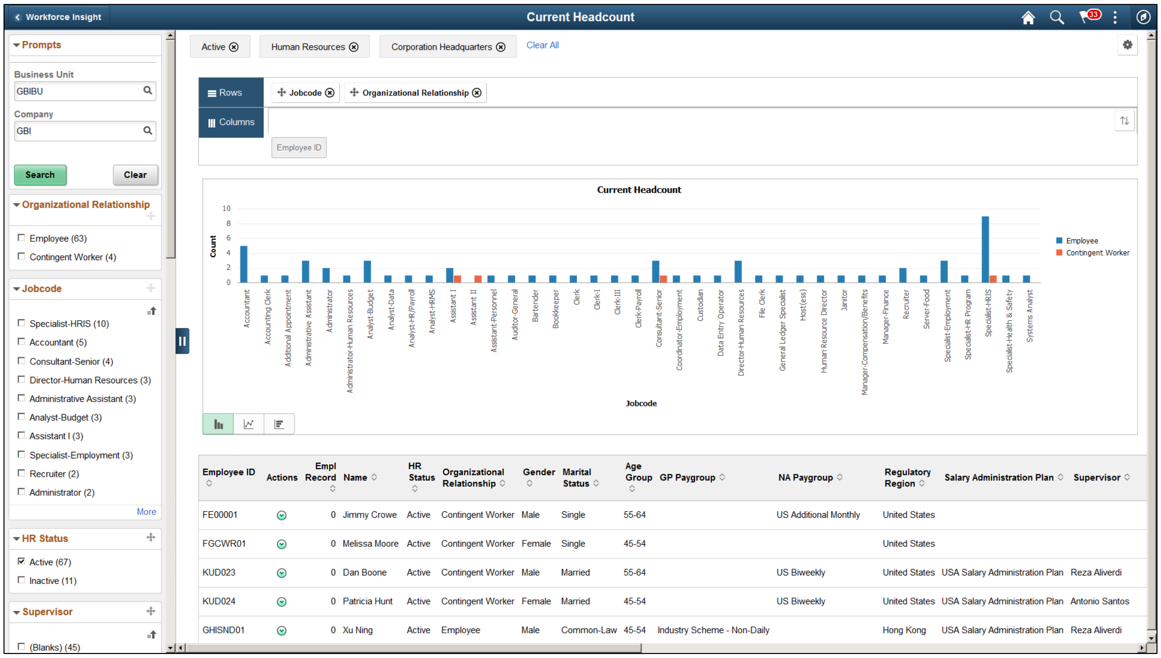
Security Role for Analytics

The PeopleSoft HCM application delivers the *HR Analytics Administrator* role to secure the Workforce Insight dashboard and the individual analytics on the dashboard. Users with this role will be granted permission to access the analytic reports available from this dashboard.

Pivot Grid Page Layout and Common Elements

When you select an analytics tile, the system displays the transactional pivot grid page for the tile you selected. Although pivot grid options may vary, the page layout is similar between all pivot grids. This section will discuss some of the common elements shared by pivot grids.

This example illustrates a 2D bar chart pivot grid where filters and chart axis options are engaged when using a large form factor device. The *Active* status, *Human Resources* department, and *Corporation Headquarters* location have been selected as filters. The rows, or X-axis, is driven by *Jobcode* and is using the *Organizational Relationship* series.



Note: Throughout the remainder of these topics, the page illustrations show the individual content pages without the context of the prompt and filter sections in left panel.

Regardless of the transaction, the pivot grid pages share these common characteristics and page controls:

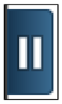
Prompts and Filters

These sections/pages are common to both large and small form factor devices.

Term	***Definition***
Prompts	Specify the parameters used to define the chart's data set.
Filters	Displays the filter categories and values eligible for this pivot grid. Select the check box values that you want to use to filter and change the data to be displayed in the chart. **Note:** Filters can be added or removed by clicking the Options Menu button in the top right corner of the page and selecting the Update Filters menu item to access the Update Filters Page.

(Desktop or Tablet)

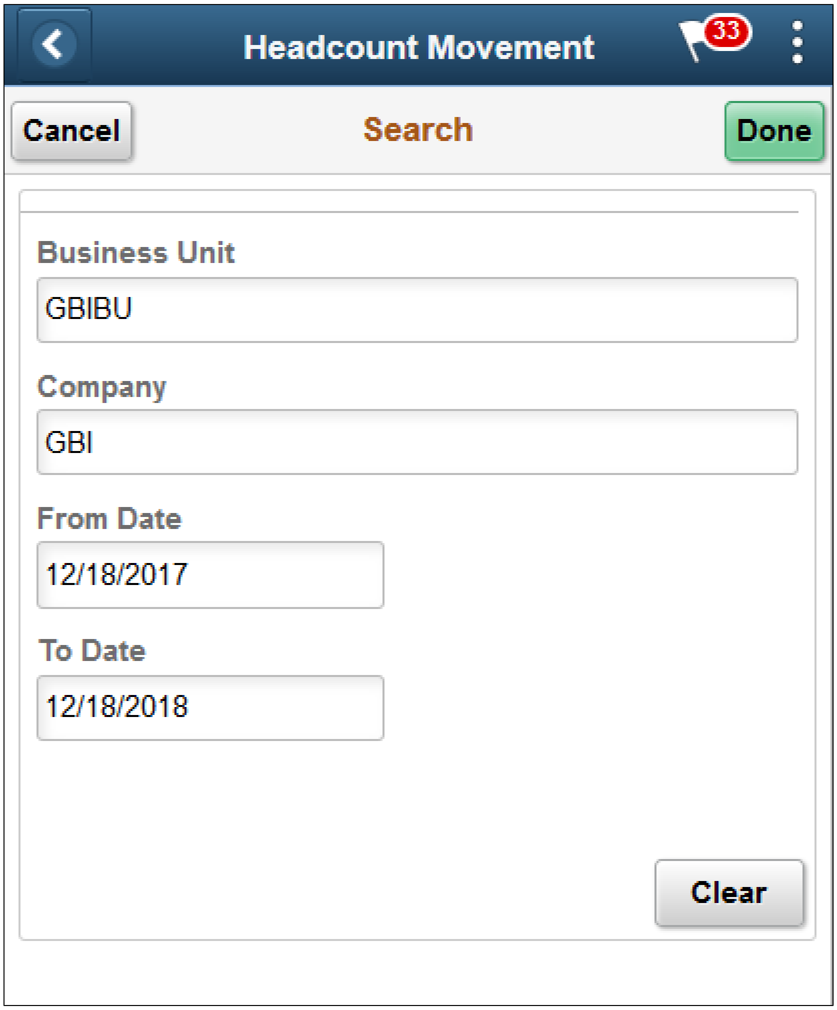
When using a large form factor device, like a desktop or tablet, the page displays a left collapsible panel to display prompts and filters.

Term	***Definition***
 Hide Filters or Show Filters	Click to show or hide the prompts and filters on the left panel. With a large form factor device, when you select filter values, they appear across the top of the main content page. To remove filters, you can deselect a filter from the left panel, individually remove them from the top of the page by clicking the Delete Selected (x) icon next to the item, or click the Clear All link to the right of the filter items.
 Drag icon	Click to drag a filter category to the Rows region above the model and change how the X-axis of the model is presented. You can include up to two filter categories: the first filter category is the x-axis and the second filter category represents the series (legend). A filter category cannot be dragged if the Drag icon appears inactive (in lighter gray color). If a filter is active, orange dotted lines appear as the borders of the filter box when you drag it.

(Smartphone)

When using a small form factor device, like a smartphone, and you select a pivot grid tile, the system first displays the <pivot grid> - Search page where you will specify the prompts that the system should use to retrieve the pivot grid page and data.

This example illustrates the <pivot grid> - Search page when using a smartphone. This example shows the prompt fields for the Headcount Movement pivot grid.



Note: The field prompts will vary by pivot grid.

When using a smartphone, this page displays the same prompt data fields as the Prompts section (for a desktop or tablet, this section is found on the left panel).

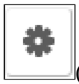
Term	***Definition***
Cancel	Click to access the pivot grid without saving changes, if any.
Done	Click to save any prompt values you entered on this page. The system will then take you to the pivot grid page.
Clear	Click this button to remove all prompt values on the page. **Note:** All prompt fields must contain a value to retrieve data for the pivot grid.

Note: You can return to the content on this page (Prompts page) to change parameter values by clicking the Filters and Prompts button from the pivot grid page, and then selecting Modify Prompts.

Content Area

These page elements are common to both large and small form factor devices unless otherwise noted.

Although these menu items are generally available to all pivot grids, the actions and values you set within these options are specific to the pivot grid you have accessed. Changes to the options are specific to the current pivot grid instance you are viewing unless you save your changes.

Term	Definition
(gear icon) Options Menu	Click this button (gear icon) in the top right-hand corner of a pivot grid page to access the Options Menu drop-down list. Select from the following items to take actions towards the pivot grid model. • *View Grid*: (Not available for smartphones) Click to open the (Desktop or Tablet) View Grid - <Pivot Grid> Page and view a summary of data counts and select specific values to view the details in grid format. • *Update Filters*: Click to open the Update Filters Page where you can add or remove filters to be available for use in the pivot grid model. • *Chart Options*: Click to open the Chart Options Page where you can change the chart layout, labels, and information displayed on chart axes. • *Export Data*: (Not available for smartphones) Click to export the underlying PSQuery data into a spreadsheet. • *Threshold Options*: (Not available for smartphones) Click to open the Threshold Personalization Page and configure the threshold levels and options for this pivot grid. • *Reset*: Select to delete all saved personalizations of the current model and reset the model to the default layout. • *Save*: Click to save the current chart options as the default view. • *Save As*: Click to save a copy of the current pivot grid and chart layout model with the name and title that you specify. This saves it as a different layout option for this pivot grid and can be viewed by selecting the Saved Views item from the Options Menu. • *Saved Views*: Select this item to open the Saved Views page and select from a list of your saved pivot grid layout options (created using the Save As option) for this report model. You can delete your saved pivot grids from the Saved View page by selecting the Delete Selected (x) icon, but you cannot delete the delivered pivot grid. • *Sort Option*: Click to open the Sort Options page and the update the current sort order with some available parameters, if applicable.

Term	Definition
	• *Add to Homepage*: Select to add this pivot grid to a homepage of your choosing.
 (pivot grid chart types)	Click to display data in the chart type represented by the icon. Available chart types include vertical bar (default value), line, pie, and horizontal bar. These options may vary by pivot grid.

(Desktop or Tablet)

When using a large form factor device, like a desktop or tablet, content area displays these additional page elements.

Term	Definition
Rows	Displays the X-axis (maximum of 2) for the model that are used as its X-axis and series. If two filters are selected, the first one becomes the X-axis and the second one becomes the series (legend). **Note:** Drop and drag filter categories to this section or use the Chart Options Page to identify the X-axis and series.
Columns	Displays all the facts for the model that you can select as its Y-axis. **Note:** Use the Chart Options Page to identify the Y-axis.

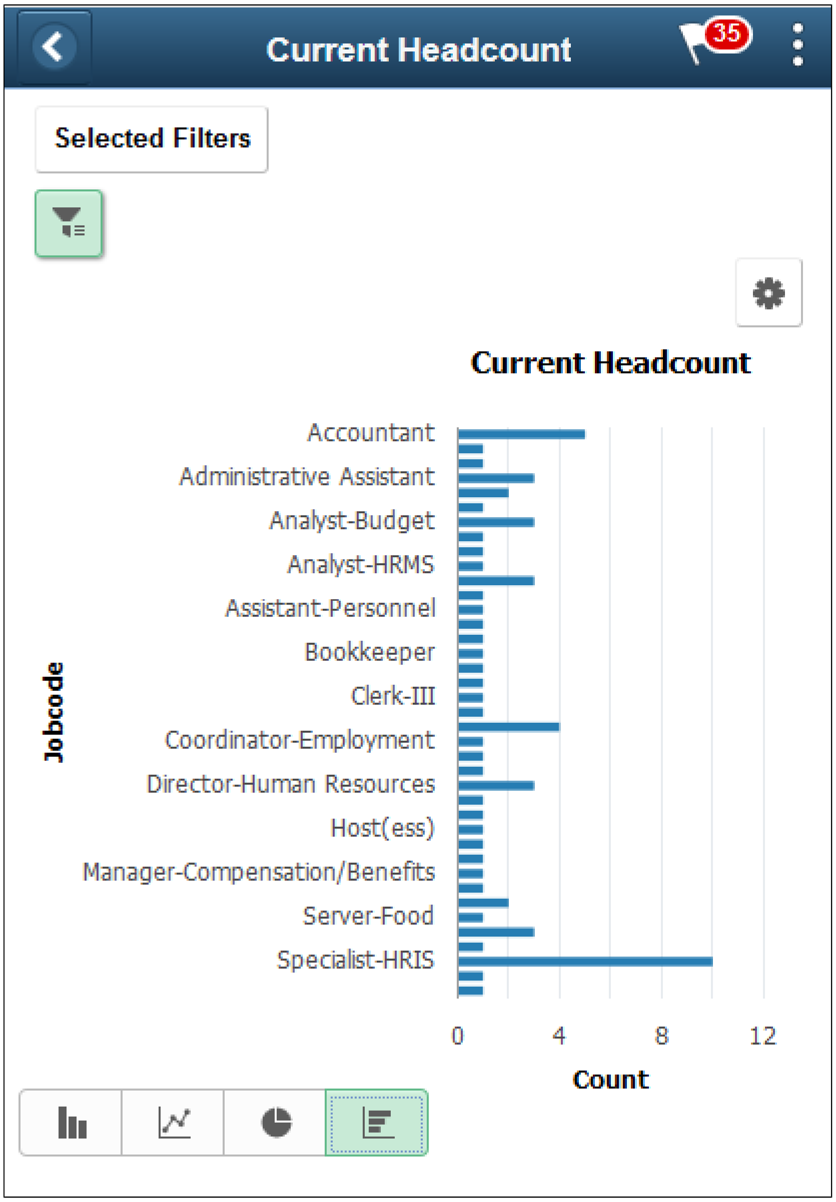
Pause over an individual graphic item, such as a bar or pie slice, to view the details and count. Click to access the drilldown Actions menu and choose from these options:

Term	Definition
Detailed View	Displays a grid with the detailed data. For example, if a bar on a bar chart represents the number of vacant approved positions, click Detailed View to display a grid with information about each of the included approved positions.
Drilldown To	Displays the drilldown options defined for the chart. Click a drilldown option to redraw the chart based on the selected type of data.

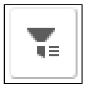
(Smartphone)

When using a small form factor device, like a smartphone, the main content area displays these additional page elements.

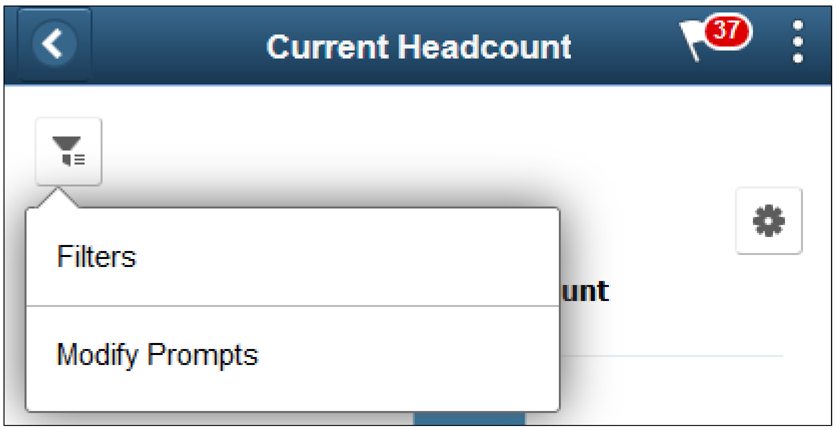
This example illustrates a horizontal pivot grid where filters and chart axis options are engaged when using a smartphone. The *Active* status, *Human Resources* department, and *Corporation Headquarters* location have been selected as filter values. The rows, or X-axis, is driven by *Jobcode*.



Term	Definition
Selected Filters	This button is available when you have filters selected. Click to show a drop-down list of which filters have been applied to this pivot grid model. Click the Delete Selected (x) icon next to a filter item to remove a filter.

Term	*Definition*
 Filters and Prompts button	Click this button to select one of the following Filters and Prompts option items: • Filters • Modify Prompts

This example illustrates the Filters and Prompts menu options when using a smartphone.



Term	*Definition*
Filters	Select this item from the Filters and Prompts menu to display the Filters page. Use the available filters to change the data to be displayed in the pivot grid model. **Note:** You can add or remove filters by clicking the Options Menu button in the top right corner of the page and selecting the Update Filters menu item to access the Update Filters Page.
Modify Prompts	Select this item from the Filters and Prompts menu to display the Prompts page. Use the Prompts page and view or change the parameters used to define the chart's data set.

Refresh Analytics Data Page

Use the Refresh Analytics Data page (RUN_CNTL_HR_PG) to run the process to extract and populate data for the analytics reports.

Navigation:

Workforce Administration > **Refresh Analytics Data** > **Refresh Analytics Data**

This example illustrates the Refresh Analytics Data page.

Run the HR_PG_WF_DIV application engine process to load job, personal, and diversity data for each employee (one row for each employee) as of the specified date. This process with populate the following analytic pivot grid reports:

- Highest Eduction Level (Highest Education Page)
- Diversity Overview (Diversity Overview Page)
- Diversity Analysis (Diversity Analysis Page)

Note: You must run this process to populate the extract tables for these pivot grids. They are delivered without data and thus will return empty pivot grids if you have not run this process.

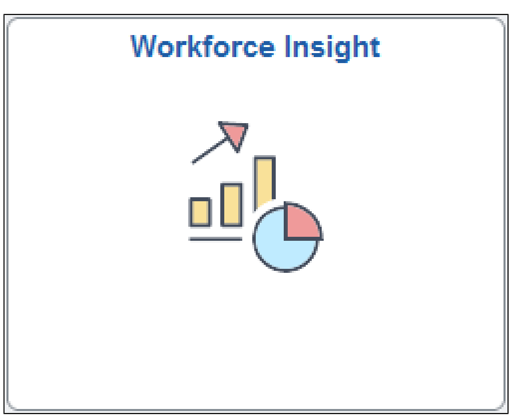
Workforce Insight Tile

Administrators use the Workforce Insight tile to access a collection of frequently-used analytic reports for workforce administration.

Navigation:

The Workforce Insight tile is delivered as part of the "Workforce Administrator Homepage" (Application Fundamentals), but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Workforce Insight tile.



Click the Workforce Insight tile to access the Workforce Insight Dashboard, which displays dynamic tiles for each analytic, with each tile showing a different analytic chart.

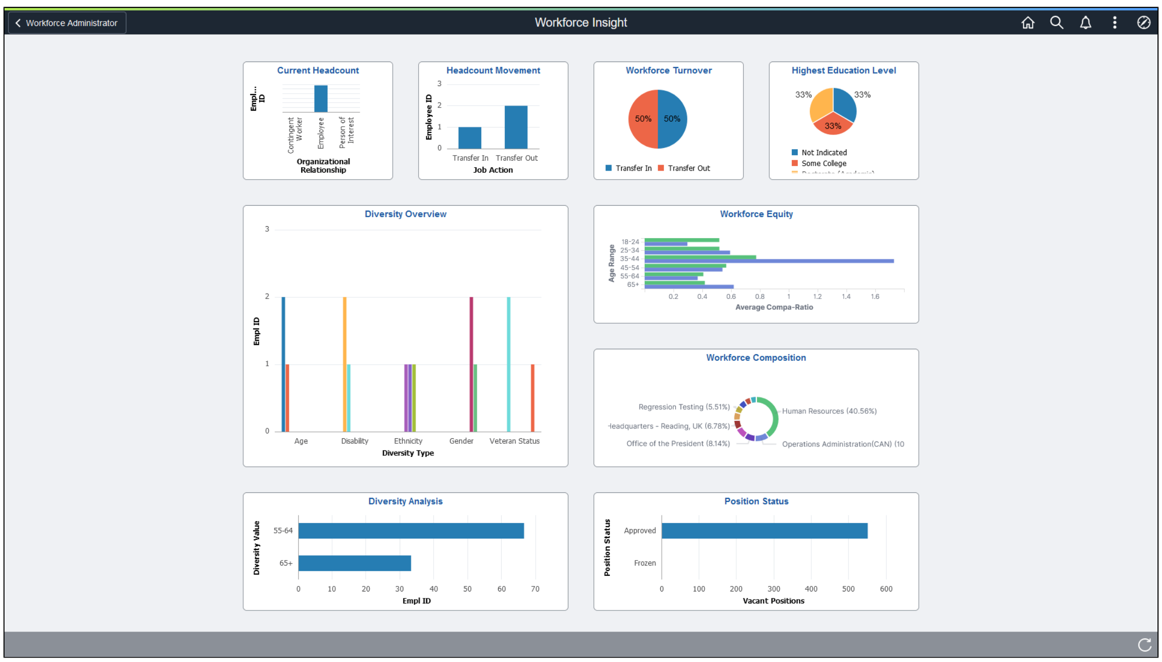
Workforce Insight Dashboard

Use the Workforce Insight dashboard (PT_LANDINGPAGE) to select from a collection of frequently used administrator analytic reports.

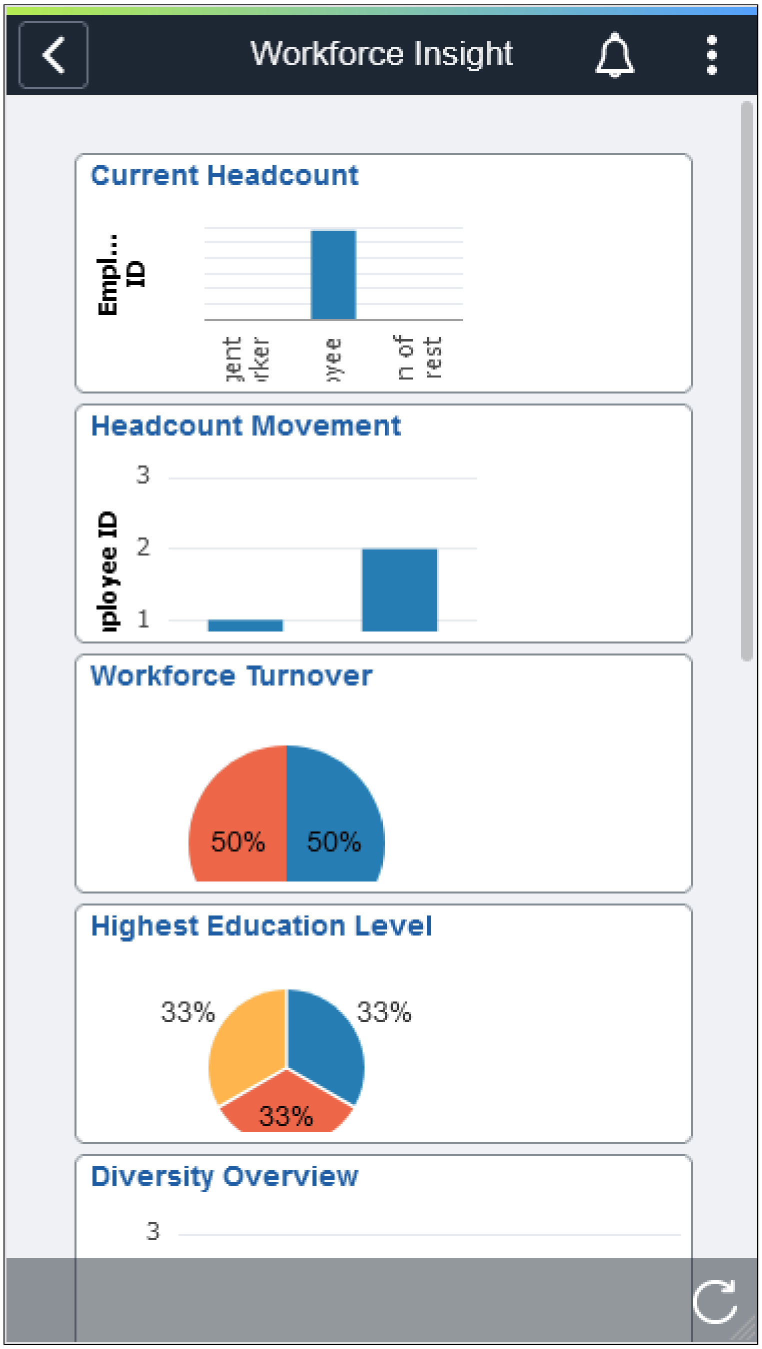
Navigation:

Select the Workforce Insight Tile, which is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Workforce Insight dashboard.



This example illustrates the Workforce Insight dashboard on a smartphone.



The Workforce Insight dashboard is a collection of analytical reports that enables administrators to view workforce data using these tiles:

- Current Headcount Tile
- Headcount Movement Tile
- Workforce Turnover Tile
- Highest Education Tile

- Diversity Overview Tile
- Workforce Equity Tile
- Workforce Composition Tile
- Diversity Analysis Tile
- Position Status Tile

Each dashboard tile displays real-time data as analytical charts.

(Desktop) Pause over individual graphic items, such as a bar or pie, to view the details and count.

Click the tile to access the corresponding pivot grid page.

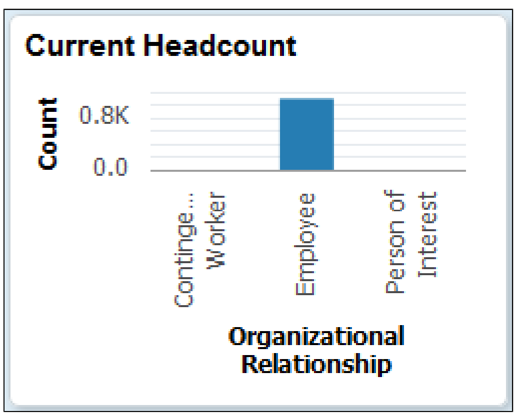
Current Headcount Tile

Use the Current Headcount tile to view the distribution of the organizational population by employees, contingent workers, and persons of interest based upon the current job effective dated rows.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Current Headcount tile.



The tile displays the bar graphic by default, but can be overwritten by clicking the tile to access the Current Headcount Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

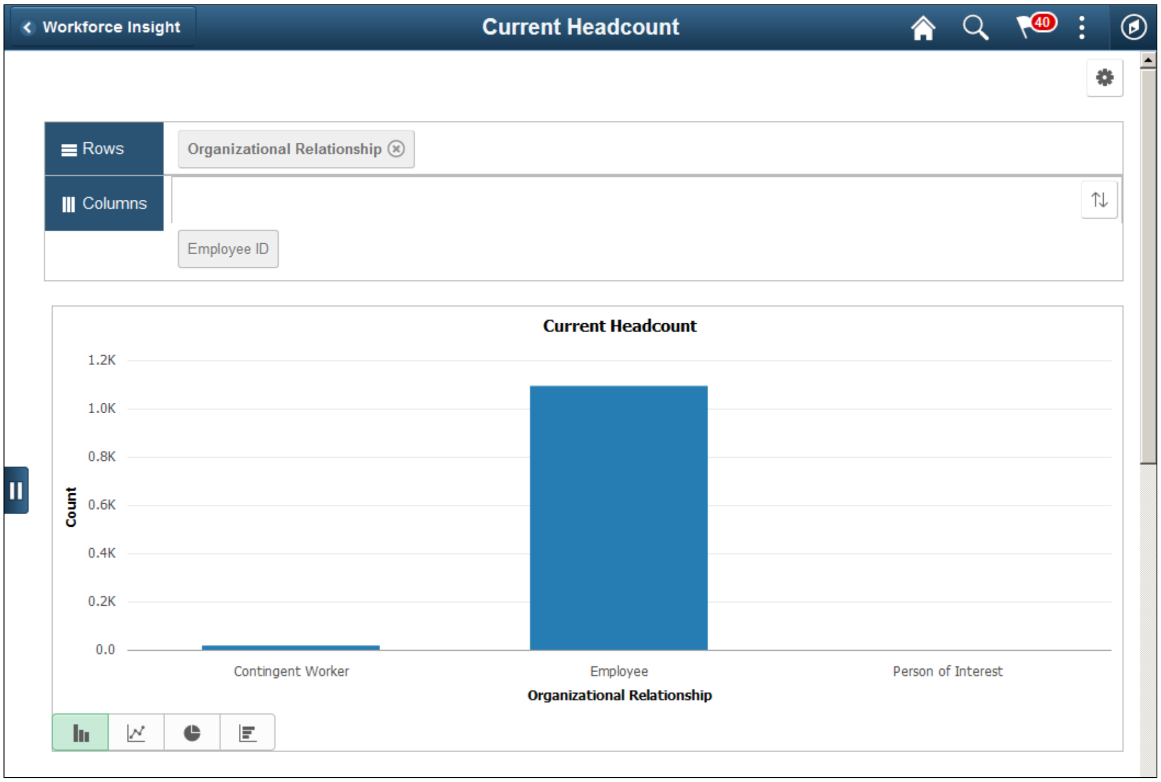
Current Headcount Page

Use the Current Headcount pivot grid page (PTPG_PGVIEWER) to view the distribution of the organizational population by employees, contingent workers, and persons of interest based upon the current job effective dated rows

Navigation:

Click the Current Headcount Tile from the Workforce Insight dashboard.

This example illustrates the Current Headcount pivot chart



This example illustrates the Current Headcount grid that appears below the pivot grid chart when using a large form factor device.

Employee ID	Actions	Empl Record	Name	HR Status	Organizational Relationship	Gender	Marital Status	Age Group	GP Paygroup	NA Paygroup	Regulatory Region	Salary Administration Plan	Supervisor	Reports To	Job Action
0052		0	Shawn Mcney	Active	Contingent Worker	Unknown	Unknown	DoB Not Available		US Biweekly	United States	USA Salary Administration Plan	Malay Sia		Data Change
FE00001		0	Jimmy Crowe	Active	Contingent Worker	Male	Single	55-64		US Additional Monthly	United States				Add Contingent Worker
FGCWR01		0	Melissa Moore	Active	Contingent Worker	Female	Single	45-54			United States				Add Contingent Worker
HCLA28		0	Kurtis Wang	Active	Contingent Worker	Male	Married	55-64		Position Mgmt Pay Group	United States	USA Salary Administration Plan		Medical Assistant	Add Contingent Worker
KU0112		3	Larry McKinley	Inactive	Contingent Worker	Male	Married	65+		US Biweekly	United States				Termination

This example illustrates the Current Headcount grid that appears below the pivot grid chart when using a large form factor device.

100 rows

Full/Part Time	Jobcode	Position	Establishment	Department	Location
Part-Time	Consultant-Junior		Global Business Institute HQ	Lab Facility	New Jersey Operations
Full-Time	Specialist-HRIS		Global Business Institute HQ	Human Resources	Corporation Headquarters
Full-Time	Consultant-Senior		Global Business Institute HQ	Human Resources	Corporation Headquarters
Full-Time	Physician	Physician	Global Business Institute HQ	Lab Facility	New Jersey Operations
Part-Time	Data Entry Operator			Human Resources	Corporation Headquarters

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	***Description***
Prompts	Enter the following parameters to define the chart’s data. • Business Unit • Company
Filters	Select values from the following filter categories to narrow your report results. • Department • Organizational Relationship • HR Status • Supervisor • Jobcode • Location • Position • Reports To
Detailed View	(Desktop) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.

Field or Control	*Description*
Drilldown To	(Desktop) Select this option to analyze report data by these delivered categories: • Full/Part Time • Age Group • GP Paygroup (Global Payroll paygroup) • NA Paygroup (North American paygroup) • Gender • Marital Status • Regulatory Region • Salary Administration Plan • Establishment

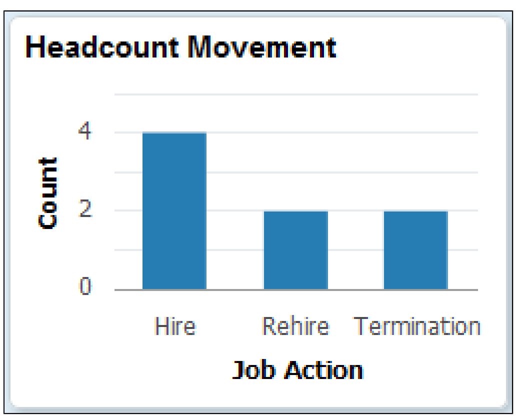
Headcount Movement Tile

Use the Headcount Movement tile to analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Headcount Movement tile.



The tile displays the bar graphic by default, but can be overwritten by clicking the tile to access the Headcount Movement Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

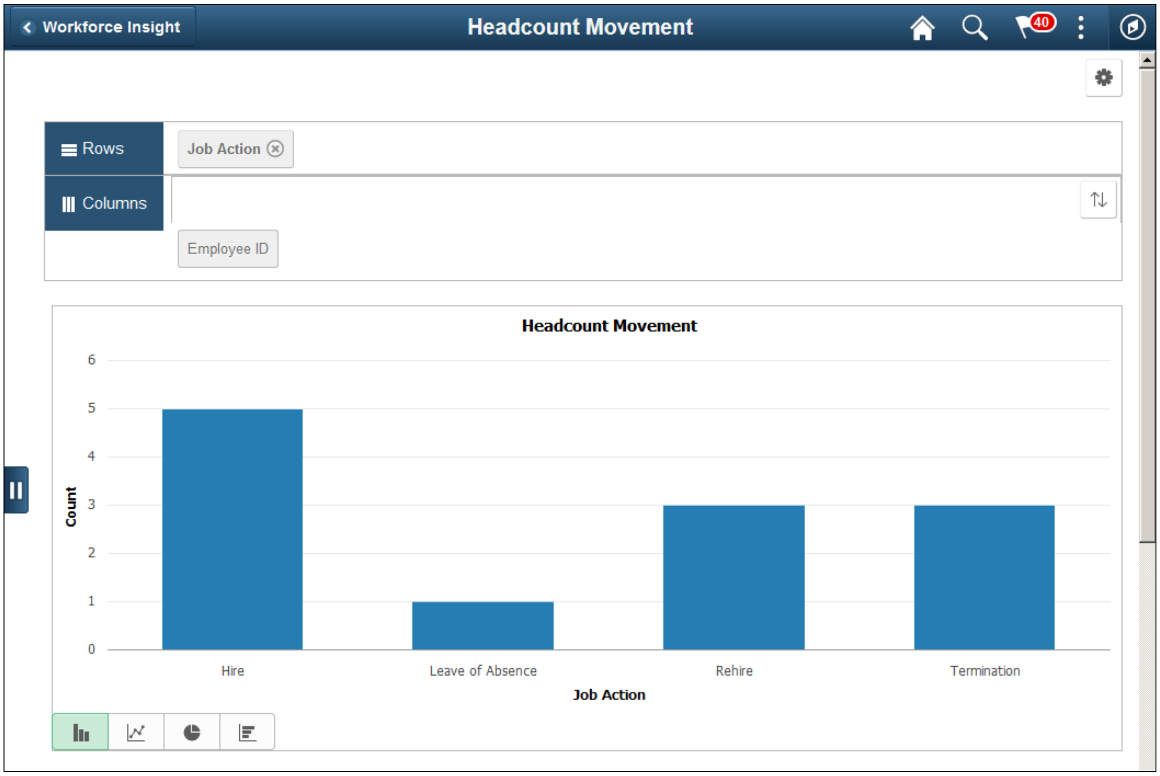
Headcount Movement Page

Use the Headcount Movement page (PTPG_NUI_VWR) to analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time.

Navigation:

Click the Headcount Movement Tile from the Workforce Insight dashboard.

This example illustrates the Headcount Movement pivot chart.



This example illustrates the Headcount Movement grid that appears below the pivot grid chart when using a large form factor device.

Employee ID	Actions	Empl Record	Name	Reports To	HR Status	Person Status	Gender	Marital Status	Age Group	GP Paygroup	NA Paygroup	Regulatory Region	Salary Administration Plan	Supervisor	Job Action	Full/Part Time	Jobcode
GASTP167		2	Mark Bickley		Active	Employee	Male	Married	25-34	STP CORE		Australia	USA Salary Administration Plan		Hire	Full-Time	Finance Specialist
GSIR28		0	gsir28 gsir28		Active	Employee	Male	Head of Household	25-34	Testing for IRAS reporting		Singapore	USA Salary Administration Plan	Kathy Wise	Hire	Full-Time	Administrator
K0G001		1	Rebekah Jones		Active	Employee	Female	Single	65+	Pay Group 1		United States	USA Salary Administration Plan	Jill Chancelor	Hire	Full-Time	Analyst-HR/Payroll
K0G002		0	Issac Nichta		Active	Employee	Male	Single	65+	Pay Group 1		United States	USA Salary Administration Plan	Jeanette Lee	Leave of Absence	Full-Time	Administrator-Human
K0G011		1	Joseph Sanders		Active	Employee	Male	Single	45-54	Pay Group 2		United States	USA Salary Administration Plan	Jill Chancelor	Hire	Full-Time	Analyst-HR/Payroll

This example illustrates the Headcount Movement grid that appears below the pivot grid chart when using a large form factor device.

12 rows

Jobcode	Position	Establishment	Department	Location
Finance Specialist			Eastern Sales Region	Corporation Headquarters
Administrator			Administration	Corporation Headquarters
Analyst-HR/Payroll		Global Business Institute HQ	Payroll	Corporation Headquarters
Administrator-Human Resources		Global Business Institute HQ	Human Resources	Corporation Headquarters
Analyst-HR/Payroll		Global Business Institute HQ	Payroll	Corporation Headquarters

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	***Description***
Prompts	Enter the following parameters to define the chart's data. • Business Unit • Company • From Date • To Date

Field or Control	***Description***
Filters	Select values from the following filter categories to narrow your report results. • Job Action • Reports To • HR Status • Supervisor • Jobcode • Position • Department • Location
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.
Drilldown To	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Full/Part Time • Age Group • GP Paygroup (Global Payroll paygroup) • NA Paygroup (North American paygroup) • Gender • Marital Status • Regulatory Region • Salary Administration Plan • Establishment

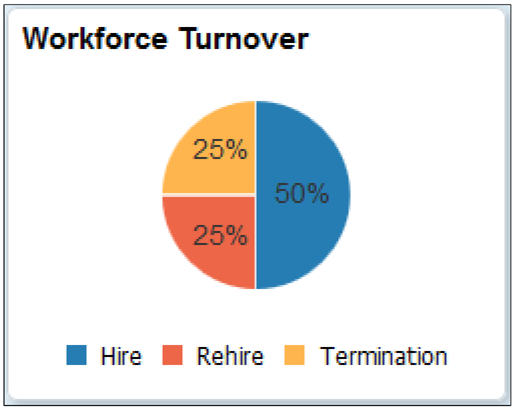
Workforce Turnover Tile

Use the Workforce Turnover tile to identify areas within the organization with the highest turnover.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Workforce Turnover tile.



The tile displays the pie graphic by default, but can be overwritten by clicking the tile to access the Workforce Turnover Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

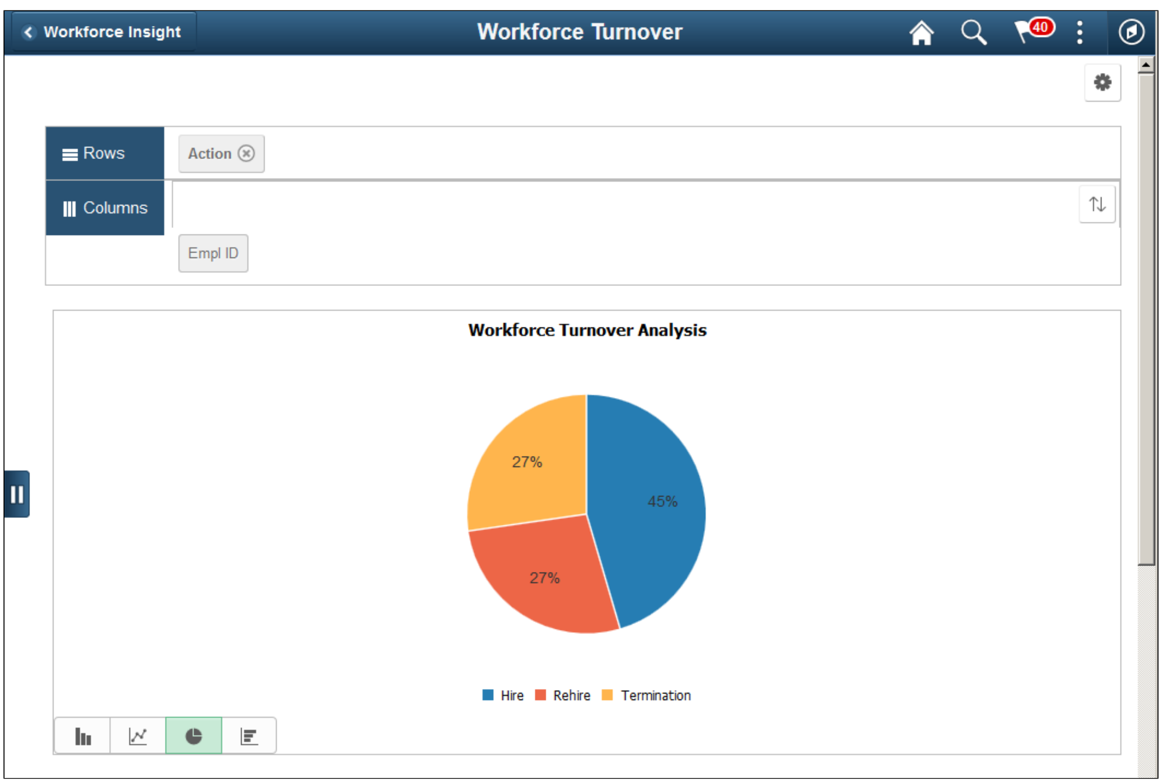
Workforce Turnover Page

Use the Workforce Turnover page (PTPG_NUI_VWR) to identify areas within the organization with the highest turnover.

Navigation:

Click the Workforce Turnover Tile from the Workforce Insight dashboard.

This example illustrates the Workforce Turnover pivot chart.



This example illustrates the Workforce Turnover grid that appears below the pivot grid chart when using a large form factor device.

11 rows

Empl ID	Empl Record	Employee Name	HR Status	Action	Action Reason	Age Range	Gender	Position	Regulatory Region	Department	Location	Establishment	Job Code	Supervisor	Reports To	Regular/Temporary	Full/Part Time	Employee Type
GASTP167	2	Mark Bickley	Active	Hire		25-34	Male		Australia	Eastern Sales Region	Corporation Headquarters		Finance Specialist			Regular	Full-Time	Not Applicable
GSIR28	0	gsir28 gsir28	Active	Hire		25-34	Male		Singapore	Administration	Corporation Headquarters		Administrator	Kathy Wise		Regular	Full-Time	Not Applicable
K0G001	1	Rebekah Jones	Active	Hire		65+	Female		United States	Payroll	Corporation Headquarters	Global Business Institute HQ	Analyst-HR/Payroll	Jill Chancelor		Regular	Full-Time	Not Applicable
K0G011	1	Joseph Sanders	Active	Hire		45-54	Male		United States	Payroll	Corporation Headquarters	Global Business Institute HQ	Analyst-HR/Payroll	Jill Chancelor		Regular	Full-Time	Not Applicable
K0G016	0	Edward Eagle	Active	Rehire		35-44	Male		United States	Central Sales Region	Delaware Operations	Global Business Institute HQ	Representative-Sales			Regular	Full-Time	Not Applicable
K0G016	0	Edward Eagle	Inactive	Termination		35-44	Male		United States	Central Sales Region	Delaware Operations	Global Business Institute HQ	Representative-Sales			Regular	Full-Time	Not Applicable

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	***Description***
Prompts	Enter the following parameters to define the chart’s data. • Business Unit • Company • From Date • To Date
Filters	Select values from the following filter categories to narrow your report results. • Action • HR Status • Position • Department • Location • Job Code • Supervisor • Reports To

Field or Control	***Description***
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.
Drilldown To	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Action Reason • Full/Part Time • Age Range • Gender • Regulatory Region • Employee Type • Establishment • Regular/Temporary

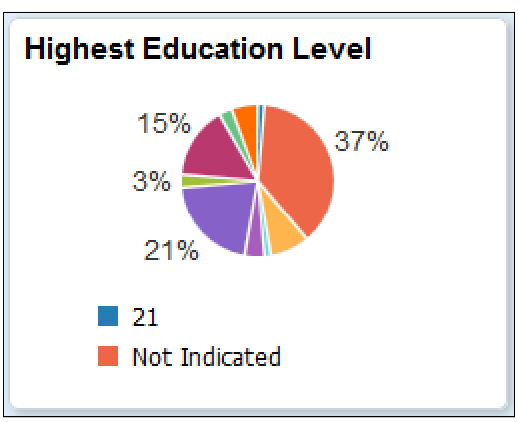
Highest Education Tile

Use the Highest Education tile to view the highest level of education completed by your workforce.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Highest Education tile.



The tile displays the pie graphic by default, but can be overwritten by clicking the tile to access the Highest Education Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

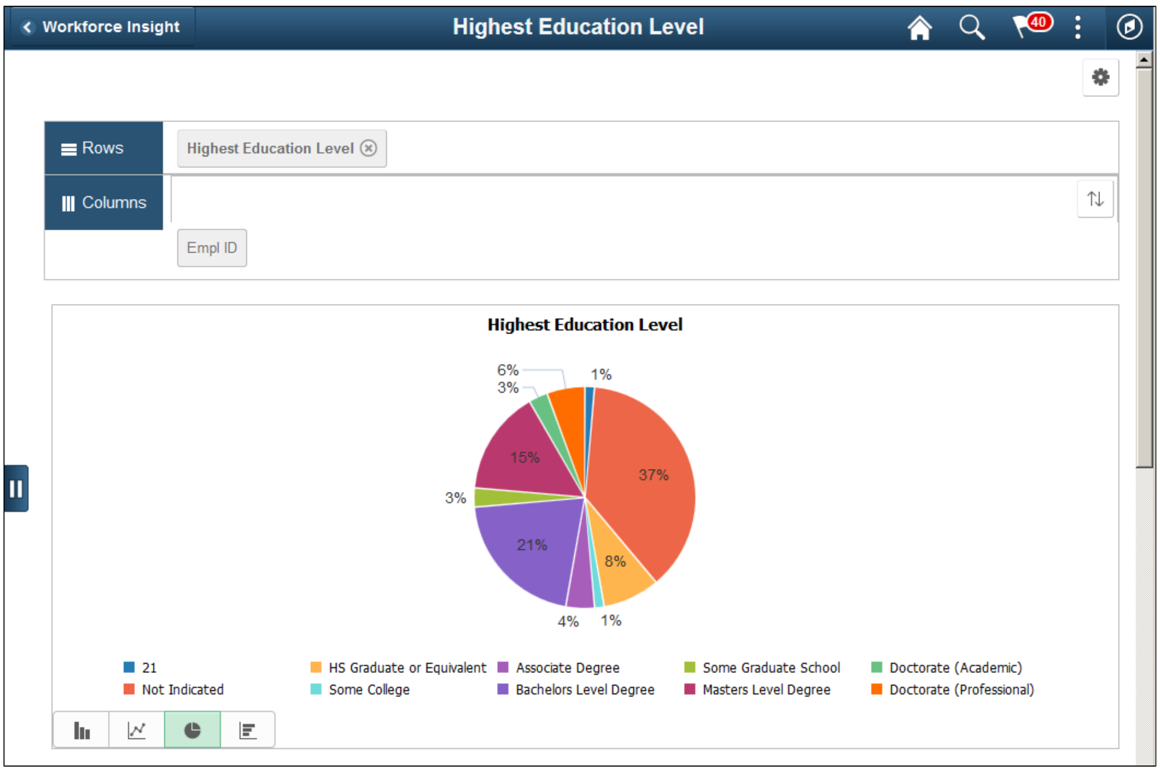
Highest Education Page

Use the Highest Education page (PTPG_NUI_VWR) to view the highest level of education completed by your workforce.

Navigation:

Click the Highest Education Tile from the Workforce Insight dashboard.

This example illustrates the Highest Education pivot chart.



This example illustrates the Highest Education grid that appears below the pivot grid chart when using a large form factor device.


72 rows

Empl ID	Employee Name	Highest Education Level	Gender	Company	Location	Department	Job Code	Regular/Temporary	Full/Part Time	Employee Type
KU0016	Joanna Strunsky	Not Indicated	Female	Global Business Institute	Corporation Headquarters	Accounts Receivable	Finance Specialist	Regular	Part-Time	Hourly
KU0020	Christelle Stevenson	Not Indicated	Female	Global Business Institute	Corporation Headquarters	Accounts Receivable	Manager-Accounting	Regular	Full-Time	Salaried
KU0039	Shawn Quilligan	Not Indicated	Male	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0044	Daryl Reese	Not Indicated	Male	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Full-Time	Salaried
KU0046	Rosanna Channing	Not Indicated	Female	Global Business Institute	Corporation Headquarters	Corporate Accounting	Senior Accounting Manager	Regular	Full-Time	Salaried
KU0048	Brenton Francisco	Not Indicated	Male	Global Business Institute	Corporation Headquarters	Accounts Payable	Finance Specialist	Regular	Full-Time	Salaried
KU0059	Vicki Zinn	Not Indicated	Female	Global Business Institute	Corporation Headquarters	Corporate Accounting	Accountant	Regular	Full-Time	Salaried

Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	*Description*
Prompts	Enter the following parameters to define the chart's data. • Business Unit • Regulatory Region • From Date • To Date
Filters	Select values from the following filter categories to narrow your report results. • Highest Education Level • Company • Location • Department • Job Code
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.

Field or Control	*Description*
Drilldown To	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Employee Type • Full/Part Time • Regular/Temporary • Gender

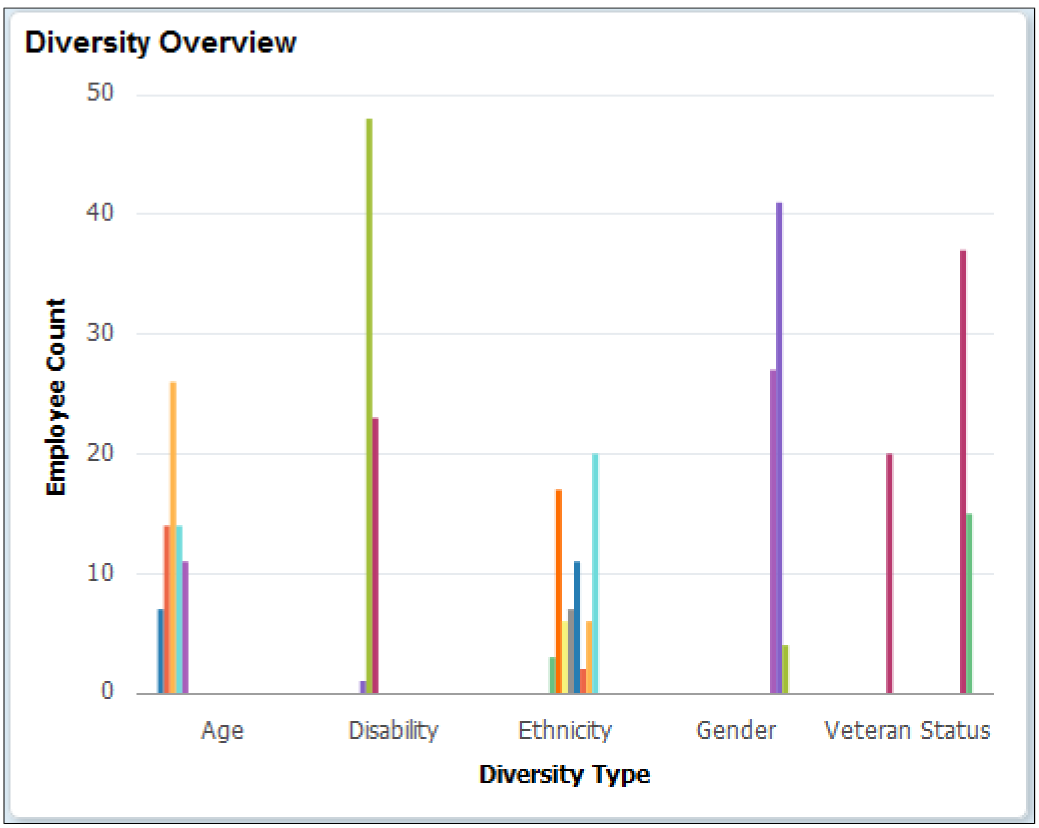
Diversity Overview Tile

Use the Diversity Overview tile to view the workforce by several diversity types at once (age, disability, ethnicity, gender, and veteran status).

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Diversity Overview tile.



The tile displays the bar graphic by default, but can be overwritten by clicking the tile to access the Diversity Overview Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

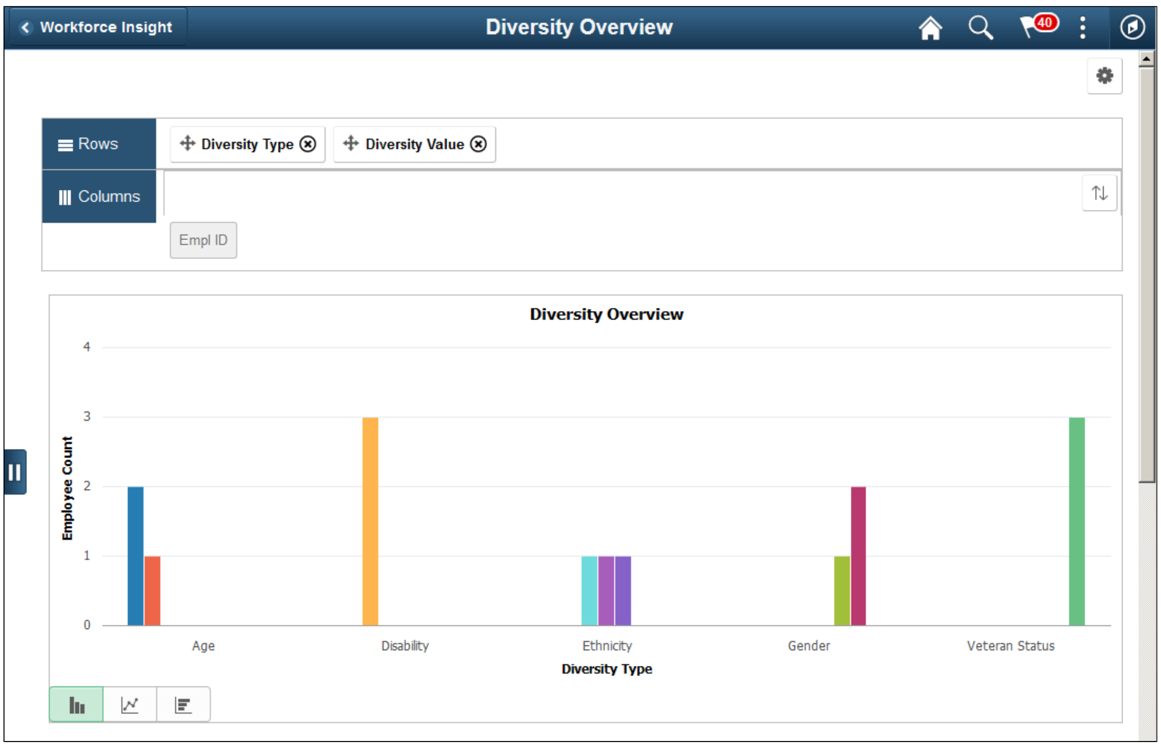
Diversity Overview Page

Use the Diversity Overview page (PTPG_NUI_VWR) to view the workforce by several diversity types at once (age, disability, ethnicity, gender, and veteran status).

Navigation:

Click the Diversity Overview Tile from the Workforce Insight dashboard.

This example illustrates the Diversity Overview pivot chart.



This example illustrates the Diversity Overview grid that appears below the pivot grid chart when using a large form factor device.

15 rows

Empl ID	Employee Name	Diversity Type	Diversity Value	Company	Location	Department	Job Code	Regular/Temporary	Full/Part Time	Employee Type
KU0039	Shawn Quilligan	Age	45-54	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0039	Shawn Quilligan	Disability	Not Disabled	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0039	Shawn Quilligan	Ethnicity	Hispanic/Latino	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0039	Shawn Quilligan	Gender	Male	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0039	Shawn Quilligan	Veteran Status	Not a Veteran	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried

Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	*Description*
Prompts	Enter the following parameters to define the chart's data. • Regulatory Region • Business Unit • From Date • To Date
Filters	Select values from the following filter categories to narrow your report results. • Diversity Value • Diversity Type • Company • Location • Department • Job Code
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.

Field or Control	***Description***
Drilldown To and **Drilldown Intersection To**	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Employee Type • Full/Part Time • Regular/Temporary

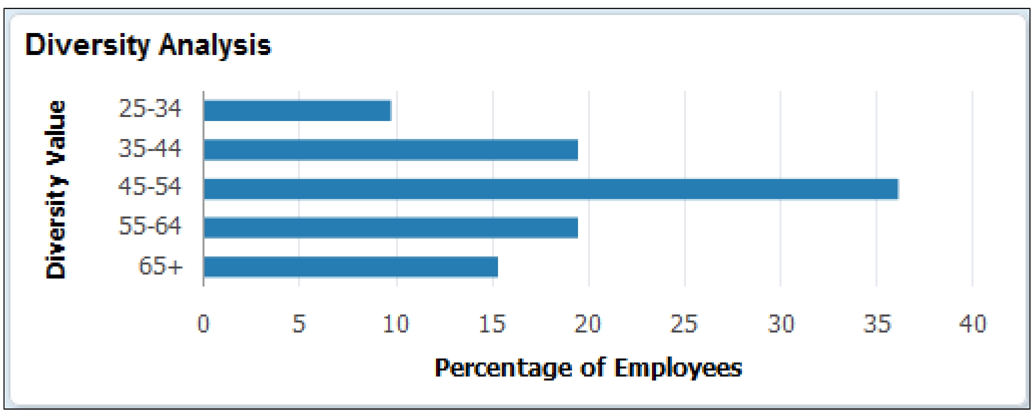
Diversity Analysis Tile

Use the Diversity Analysis tile to review the employee distribution percentage for one diversity type at a time.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Diversity Analysis tile.



The tile displays the bar graphic by default, but can be overwritten by clicking the tile to access the Diversity Analysis Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

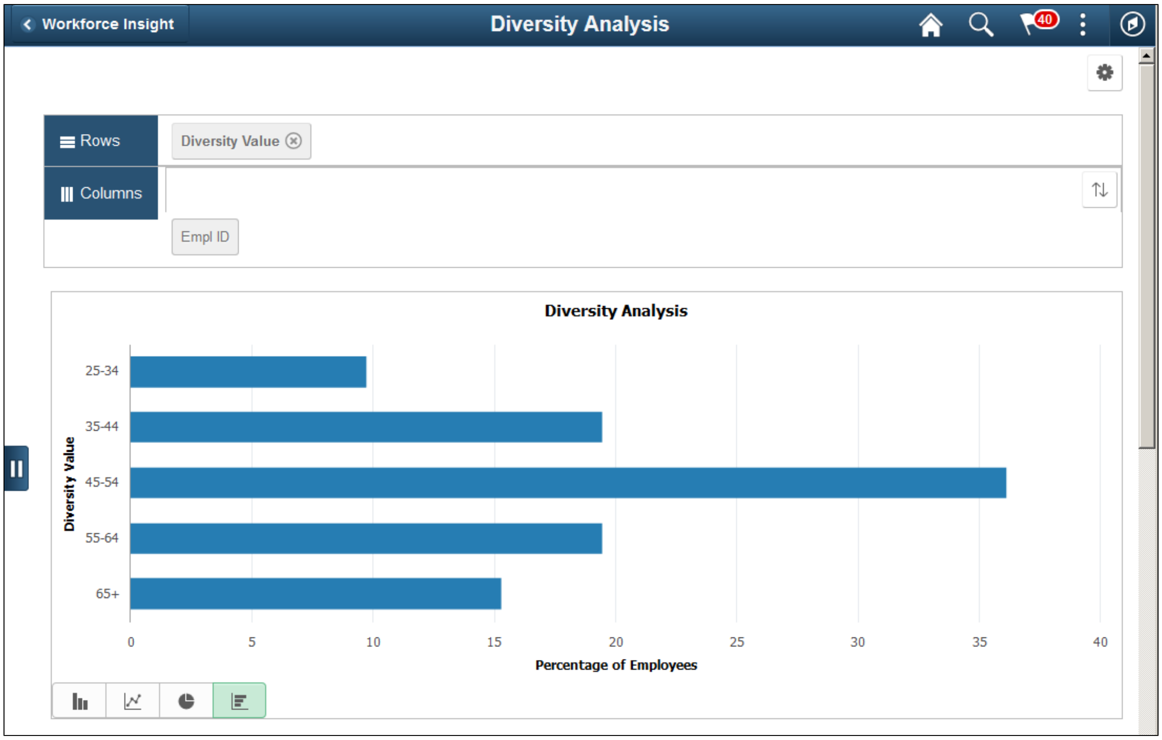
Diversity Analysis Page

Use the Diversity Analysis page (PTPG_NUI_VWR) to review the employee distribution percentage for one diversity type at a time.

Navigation:

Click the Diversity Analysis Tile from the Workforce Insight dashboard.

This example illustrates the Diversity Analysis pivot chart.



This example illustrates the Diversity Analysis grid that appears below the pivot grid chart when using a large form factor device.

72 rows

Empl ID	Employee Name	Diversity Value	Company	Location	Department	Job Code	Regular/Temporary	Full/Part Time	Employee Type
KU0016	Joanna Strunsky	65+	Global Business Institute	Corporation Headquarters	Accounts Receivable	Finance Specialist	Regular	Part-Time	Hourly
KU0020	Christelle Stevenson	55-64	Global Business Institute	Corporation Headquarters	Accounts Receivable	Manager-Accounting	Regular	Full-Time	Salaried
KU0044	Daryl Reese	55-64	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Full-Time	Salaried
KU0039	Shawn Quilligan	45-54	Global Business Institute	Corporation Headquarters	Corporate Accounting	Financial Analyst	Regular	Part-Time	Salaried
KU0046	Rosanna Channing	45-54	Global Business Institute	Corporation Headquarters	Corporate Accounting	Senior Accounting Manager	Regular	Full-Time	Salaried

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Important! You must run the HR_PG_WF_DIV application engine process to populate the extract table for this pivot grid. Data for this pivot grid is delivered without data and will return an empty pivot grids if you have not run this process. See the Refresh Analytics Data Page for more information.

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	***Description***
Prompts	Enter the following parameters to define the chart's data. • Diversity Type (*Age*, *Disability*, *Ethnicity*, *Gender*, and *Veteran Status*) • Regulatory Region • Business Unit • From Date • To Date
Filters	Select values from the following filter categories to narrow your report results. • Diversity Value • Company • Location • Department • Job Code
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.
Drilldown To	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Employee Type • Full/Part Time • Regular/Temporary

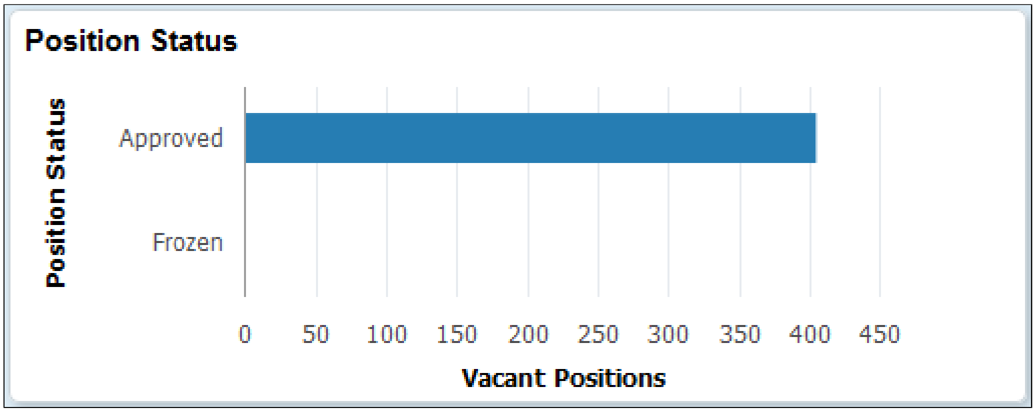
Position Status Tile

Use the Position Status tile to view vacant positions within the organization by approved or frozen status.

Navigation:

From the Workforce Administrator homepage, click the Workforce Insight Tile to access the dashboard.

This example illustrates the Position Status tile.



The tile displays the bar graphic by default, but can be overwritten by clicking the tile to access the pivot gridPosition Status Page, making filter and option changes, and saving the chart.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

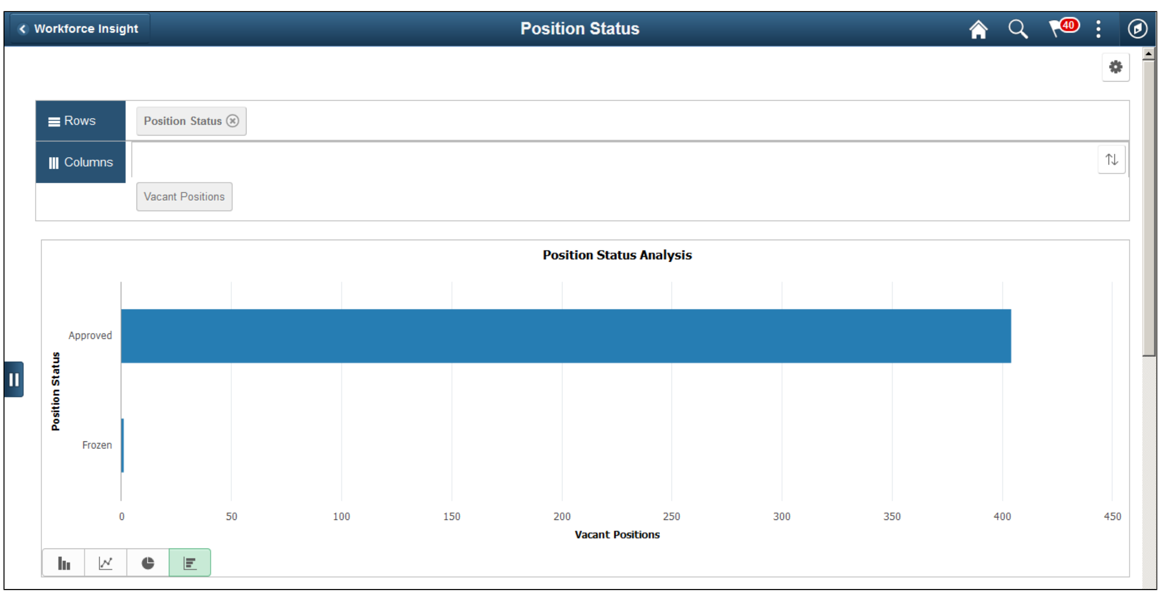
Position Status Page

Use the Position Status page (PTPG_NUI_VWR) to view vacant positions within the organization by approved or frozen status.

Navigation:

Click the Position Status Tile from the Workforce Insight dashboard.

This example illustrates the Position Status pivot chart.



This example illustrates the Position Status grid that appears below the pivot grid chart when using a large form factor device.

Position	Effective Date	Position Title	Position Status	Regulatory Region	Company	Location	Department	Job Code	Job Title
10000000	11/10/2008	Director-Administration	Approved	USA	Global Business Institute	Corporation Headquarters	Administration	940005	Administration Director
10000001	01/01/1990	Manager-Compensation/Benefits	Approved	USA	Global Business Institute 9999	Corporation Headquarters	Benefits	600035	Manager-Compensation/Benefits
10000002	01/01/1990	Human Resource Analyst	Approved	USA	Global Business Institute 9999	Corporation Headquarters	Benefits	140065	Analyst-Human Resources
10000003	01/01/1990	Benefits Specialist	Approved	USA	Global Business Institute 9999	Corporation Headquarters	Benefits	820005	Specialist-Benefits
10000004	01/01/1990	Director-Customer Services	Approved	USA	Global Business Institute 9999	Oklahoma	Customer Service	420025	Director-Customer Services

This example illustrates the Position Status grid that appears below the pivot grid chart when using a large form factor device.

100 rows

Regular/Temporary	Full/Part Time	Current Head Count	Max Head Count	Vacant Positions	Budgeted Position	Confidential Position	Job Sharing Permitted	Available For Telework
Regular	Full-Time	1	1	0	Budgeted	Not Confidential	No Job Sharing	Not Available for Telework
Regular	Full-Time	2	1	0	Budgeted	Not Confidential	No Job Sharing	Not Available for Telework
Regular	Full-Time	4	3	0	Budgeted	Not Confidential	No Job Sharing	Not Available for Telework
Regular	Full-Time	3	2	0	Budgeted	Not Confidential	No Job Sharing	Not Available for Telework
Regular	Full-Time	0	1	1	Budgeted	Not Confidential	No Job Sharing	Not Available for Telework

From the pivot grid page, you have the option to change prompts, filters, change other options, and perform drilldowns. For information on common page elements, see Pivot Grid Page Layout and Common Elements.

(Desktop) When using a desktop, pause over a graph item to view the details and count.

Chart Content and Layout

The following information lists the delivered fields from which you can select values for this pivot grid:

Field or Control	***Description***
Prompts	Enter the following parameters to define the chart’s data. • Business Unit • Job Title

Field or Control	***Description***
Filters	Select values from the following filter categories to narrow your report results. • Position Status • Regulatory Region • Company • Location • Department • Job Code
Detailed View	(Desktop or Tablet) Select this option to display the grid to view a list of employees that make up the results for the bar or pie piece.
Drilldown To	(Desktop or Tablet) Select this option to analyze report data by these delivered categories: • Full/Part Time • Available For Telework • Budgeted Position • Confidential Position • Job Sharing Permitted • Regular/Temporary

(Desktop or Tablet) View Grid - <Pivot Grid> Page

When using a large form factor devise, use the View Grid - <Pivot Grid> page (PTPG_GRIDVIEWERNUI) to view a summary of data counts and select specific values to view the details in grid format.

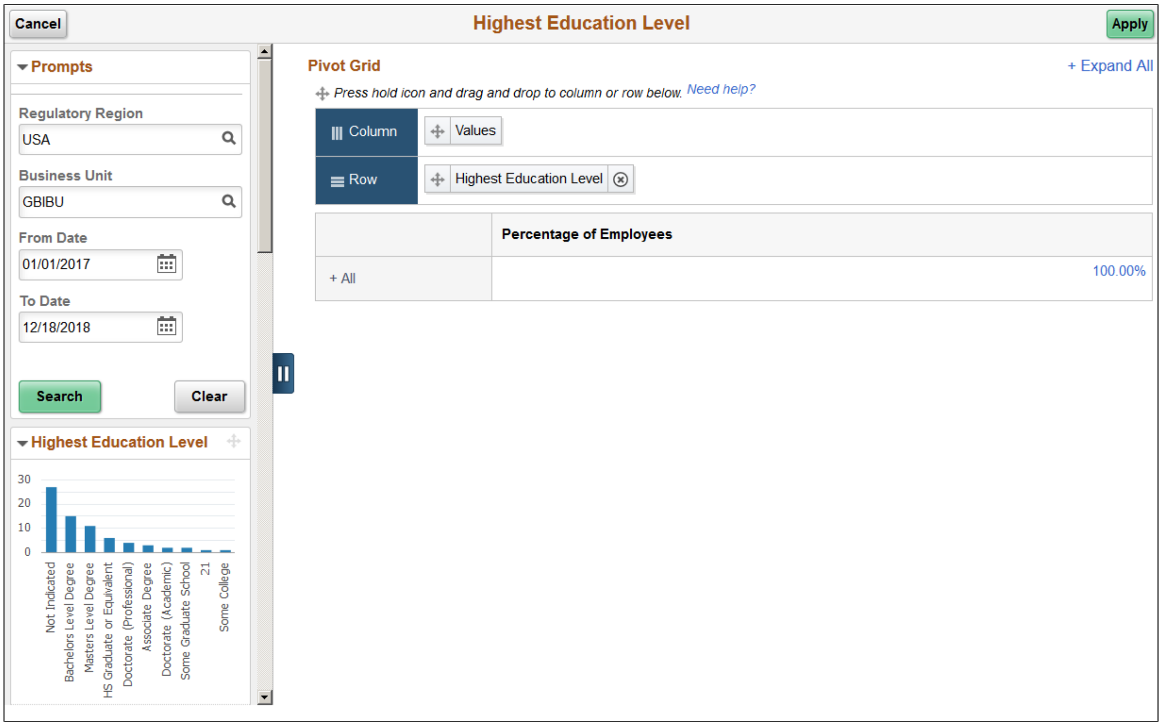
Note: The page title will vary according to the pivot grid you have accessed.

Navigation:

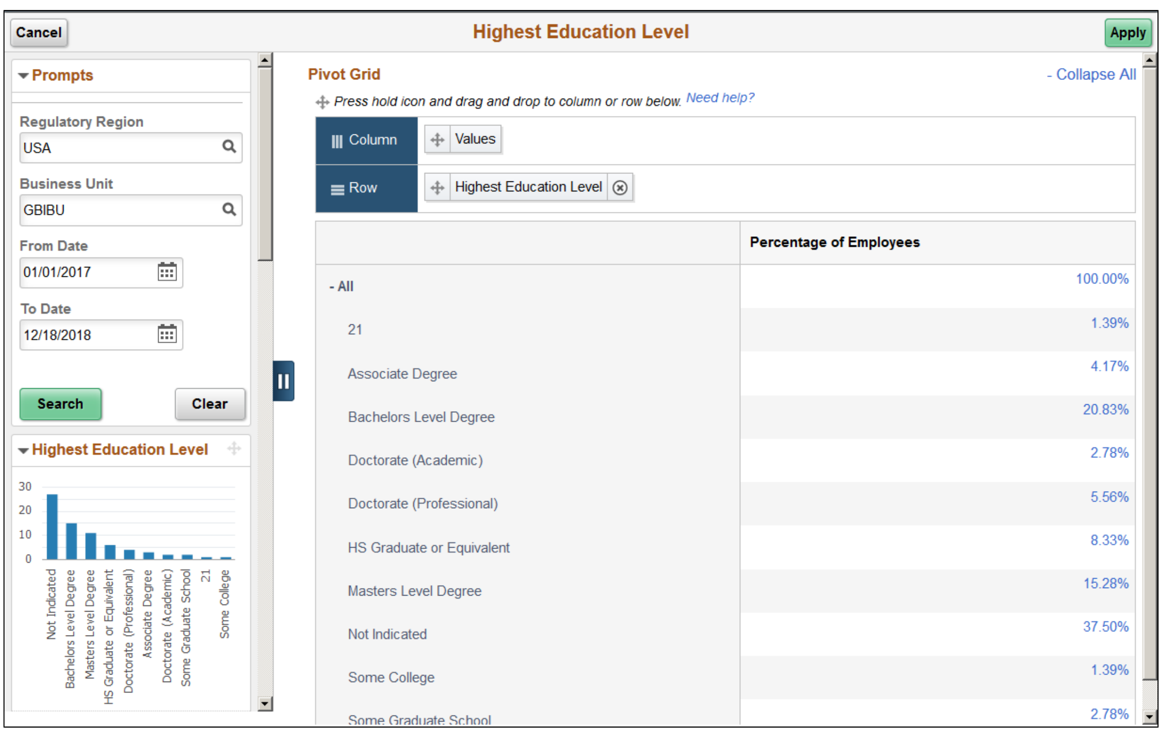
Select the **View Grid** item from the **Options Menu** (gear icon) drop-down button in the top right-hand side of the pivot grid.

Note: The View Grid options menu item is not available for smartphones.

This example illustrates the default view of the fields and controls on the View Grid - <Pivot Grid> page.



This example illustrates the fields and controls on the View Grid - <Pivot Grid> page when the values have been expanded.



To expand the data on the page, click the +Expand All link at the top of the page or click the +All link in the results table.

Click a value link to access the <u><Pivot Grid> (Detail) Page</u> to view additional information.

You can change how data is presented in the grid by dragging and dropping segment data to a different axis. Click the **Apply** button to return to the pivot grid page to view the changes in the chart.

<Pivot Grid> (Detail) Page

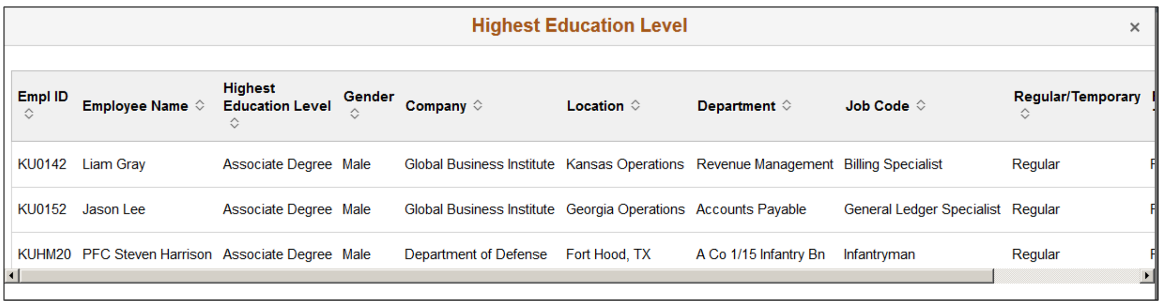
Use the <Pivot Grid> (Detail) page (PTPG_NUI_DETAIL) to view details of specific data in the grid format.

Note: The page title will vary according to the pivot grid you have accessed.

Navigation:

Click any of the value links available from (Desktop or Tablet) View Grid - <Pivot Grid> Page.

This example illustrates the Highest Eduction Level (Detail) page for the *Associates* degree.



Highest Education Level

Empl ID	Employee Name	Highest Education Level	Gender	Company	Location	Department	Job Code	Regular/Temporary
KU0142	Liam Gray	Associate Degree	Male	Global Business Institute	Kansas Operations	Revenue Management	Billing Specialist	Regular
KU0152	Jason Lee	Associate Degree	Male	Global Business Institute	Georgia Operations	Accounts Payable	General Ledger Specialist	Regular
KUHM20	PFC Steven Harrison	Associate Degree	Male	Department of Defense	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantryman	Regular

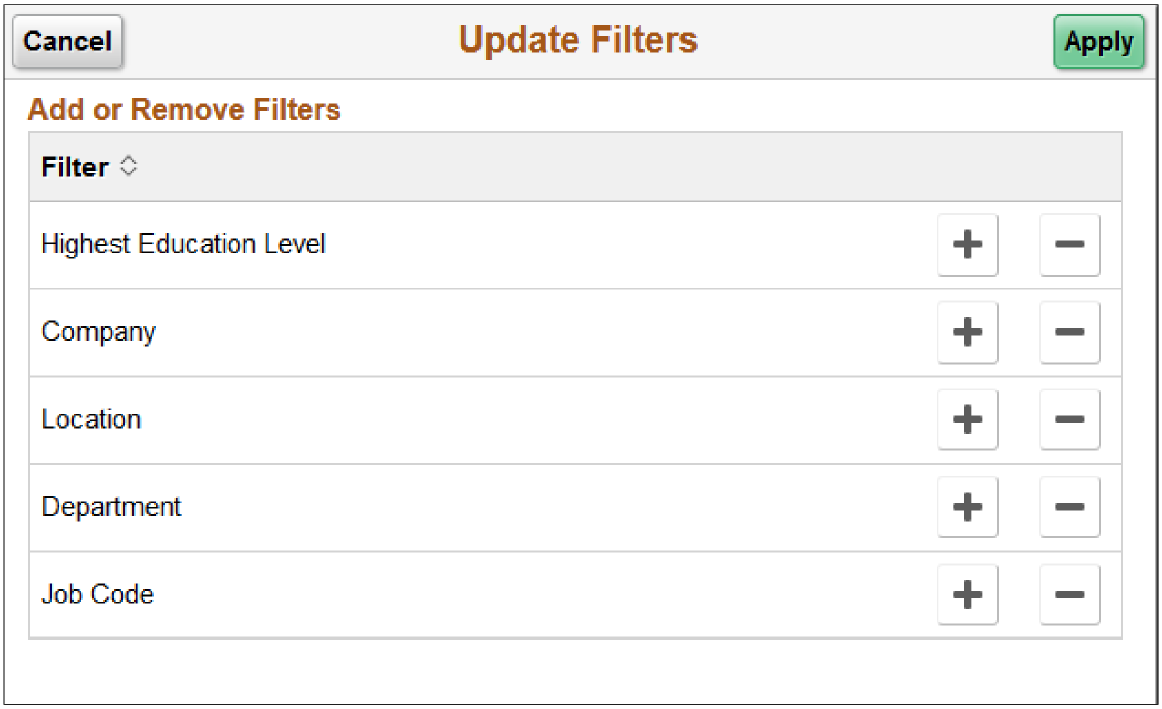
Update Filters Page

Use the Update Filters page (PTPG_NUI_FACETUPD) to add or remove filters to be available for use in the pivot grid model.

Navigation:

Select the **Update Filters** item from the **Options Menu** (gear icon) drop-down button in the top right-hand side of the pivot grid.

This example illustrates the fields and controls on the Update Filters page.



When a filter is added, it is displayed as a filter in the left panel or on the Filters page.

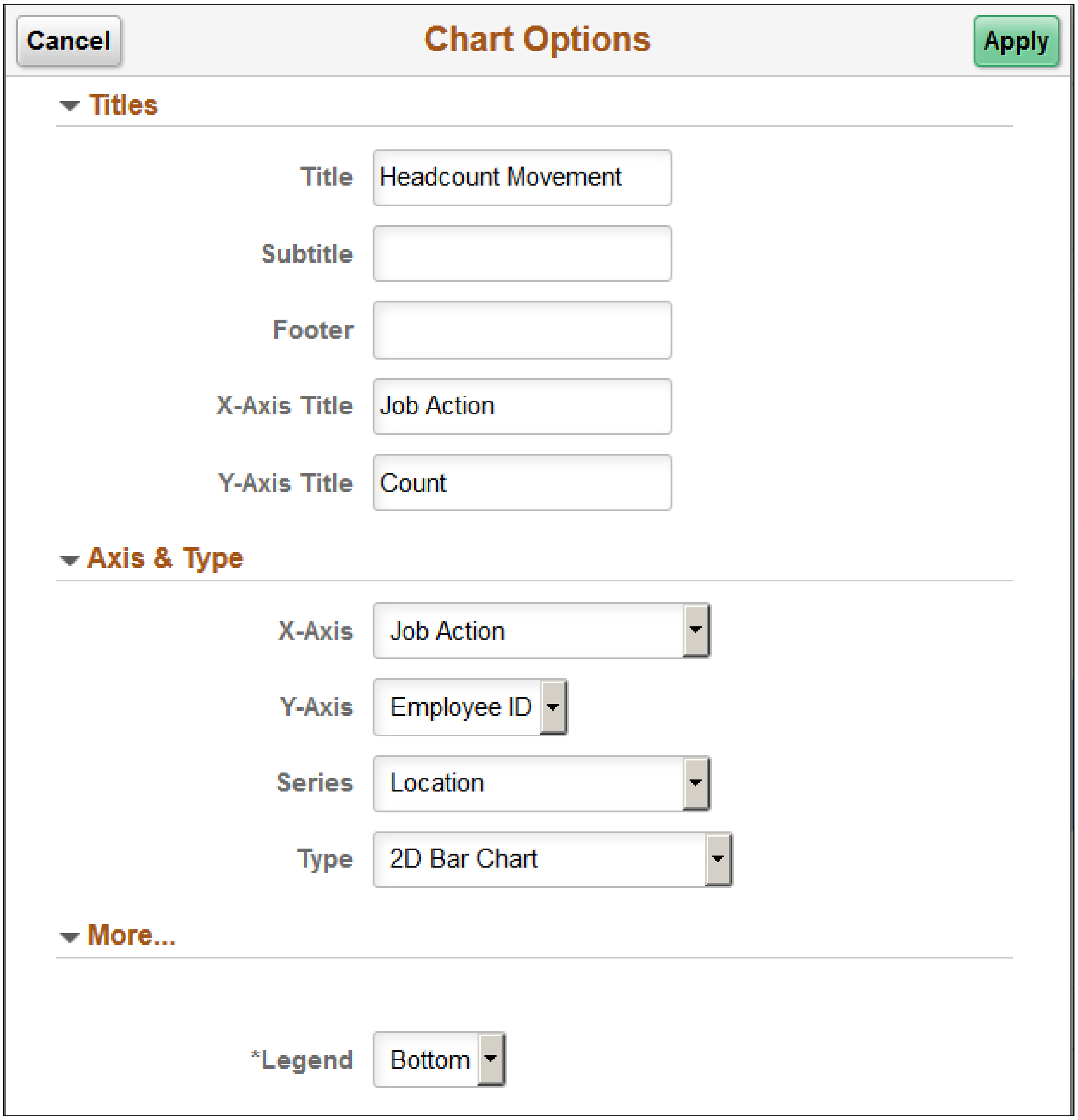
Chart Options Page

Use the Chart Options page (PTPG_NUI_CHTOPT) to define the display settings for the chart titles and axes.

Navigation:

Select the **Chart Options** item from the **Options Menu**(gear icon) drop-down button in the top right-hand side of the pivot grid.

This example illustrates the fields and controls on the Chart Options page.



Note: Options on this page may vary by pivot grid.

Use this page to change the chart title, chart type, data to be displayed on the x axis, or data to be displayed on the y axis. Changes you make here are good for the current session of viewing the pivot grid unless you save your changes via the Options Menu, Save or Save As menu items.

For example, if you want to view a headcount profile by full time/part time status, select *Full/Part Time* from the **X Axis** drop-down list and click **OK**. The chart will refresh and display the full/part time label and data on the X axis.

More...

This section is available when a series or pie chart type is selected.

Field or Control	***Description***
Legend	Identify where the legend of the chart should appear. Valid values are: • *Bottom* • *Left* • *None* • *Right* • *Top*
Exploded Pie	This option is available when you have selected a pie chart type. Select this check box to detach the pieces of a pie graphic.

Threshold Personalization Page

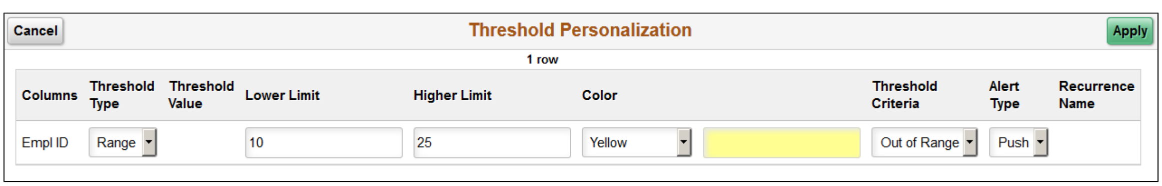
Use the Threshold Personalization page (PTPG_NUI_FACETUPD) to configure the threshold levels and options for a pivot grid.

Navigation:

Select the **Threshold Options** item from the **Options Menu** (gear icon) drop-down button in the top right-hand side of the pivot grid.

Note: Setting threshold options is not available from a smartphone.

This example illustrates the fields and controls on the Threshold Personalization page.



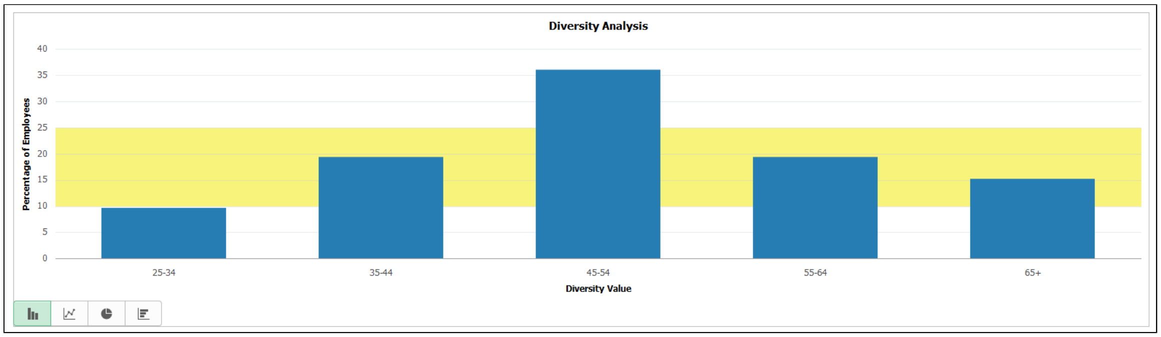
Use this page to determine threshold limits and enable notifications. This is helpful in determining when the workforce is nearing or outside a specified limit. You can also use the PeopleTools Personalized Analytics Notification functionality to alert administrators when reaching threshold limits. For example, you can set up a pivot grid to notify the HR administrator when the organization's veteran status falls below the recommended threshold. Through notifications and graphic representation, the administrator can easily see they are nearing a threshold and can take action, if necessary.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

Field or Control	***Description***
Threshold Type	Select a threshold type. Values include *Distinct* and *Range*.
Threshold Value	This field is available when you select the *Distinct* threshold type. Enter the exact number that identifies the threshold limit.
Lower Limit and **Higher Limit**	These fields are available when you select the *Range* threshold type. Enter the range of numbers that identifies the threshold limit.
Color	Indicate the color that should display on the pivot grid that marks the threshold line. This appears on the graph for easy identification of threshold limits.

Field or Control	*Description*
Threshold Criteria	Select how the system should notify the administrator. These options are available when you select the *Distinct* threshold type: • *Equal To*: When a number limit is at the specified threshold value. • *Not Equal To* : When a number limit is anything but the specified threshold value. • *Greater Than*: When a number limit is above the specified threshold value. • *Less Than*: When a number limit is below the specified threshold value. These options are available when you select the *Range* threshold type: • *In Range*: When a number limit falls between the number ranges. • *Above Range*: When a number limit is above the higher limit. • *Below Range*: When a number limit is below the lower limit. • *Out of Range*: When a number limit is below the lower limit and above the higher limit.
Alert Type	Indicate the notification type you want to use to alert the administrator. Options include: • *Mail*: An email will be sent to the administrator. • *Push*: The system will send an alert message to the administrator via the Notifications functionality. • *Both*: The system sends both an email and posts to the Notifications flag list. • *None*: Does not notify the administrator when a limit is being reached. **Note:** Pivot grids use the Personalized Analytics Notification framework for sending alerts, which is available with PeopleTools 8.57 or higher.

This example show a pivot grid where the threshold was set between 10 and 25 percent of the employees.



For more information on notifications, see the PeopleTools *Fluid User Interface Developer's Guide*, "Working with Push Notification Framework" documentation.

Managing New Hire Tasks as an Administrator Using Fluid

This topic lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to perform new hire tasks.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Homepages" (Application Fundamentals).

Pages Used to Manage New Hire Tasks as an Administrator Using Fluid

Page/Component Name	***Definition Name***	***Usage***
New Hire Tasks Tile	_AUTOGEN_NAVCOLL_6 (cref for the tile)	Access a collection of frequently-used new hire administrative components.
"Person Profile Page" (PeopleSoft Human Resources Manage Profiles)	JPM_PROFILE_PERS	Create and update person profiles.
"Development Plan Page" (PeopleSoft Human Resources Manage Professional Compliance)	PCMP_DEV_PLAN	Assemble a development plan from the list of accomplishments, competencies, courses, and activities.
Person Checklist Page	PERSON_CHECKLIST	Ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.
Update Person Detail Component	PERSONAL_DATA	Manage name, biographical information, and contact information for a person. For more information, see (Classic) Adding a Person.

Page/Component Name	***Definition Name***	***Usage***
Driver's License Data Page	DRIVERS_LIC_GBL	Enter license numbers or other data from a worker's driving record.
Badge Page	BADGE	Record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.
Identification Data Component	IDENTIFICATN_DATA	Track passport, citizenship information, visas, permits, and photos for employees. For more information, see Managing Citizenship and Visa or Permit Information
Manage Hires Page	HR_MANAGE_HIRES	View a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the template-based hire process.
Add a Person Page	PERSONAL_DATA_ADD	Initiate the process to add a person to the system, including their name, biographical information, and contact information. For more information, see (Classic) Adding a Person.
Smart HR Transactions Page	HR_TBH_EULIST	Initiate a Smart HR transaction to hire or update a person’s personal, job, or profile information.
Job Data Component	JOB_DATA	View or update the job record of an employee, contingent worker, or POI. For more information, see Understanding Job Data and (Classic) Adding Organizational Instances.
Job Information - Company Property Page	COMPANY_PROPERTY	Assign company property, such as vehicles, computer equipment, tools, or uniforms, to workers.
General Comments Page	GENL_COMMENTS	Enter a miscellaneous comment about a worker.

Page/Component Name	Definition Name	Usage
Employee SSN Verification Page	RUNCTL_TAX109	Create an electronic file that you can use to submit employee name and SSN information to the Social Security Administration for verification. For more information, see “Understanding Payroll Data” (PeopleSoft Payroll for North America) and “Tax Reports (TAX)” (PeopleSoft Payroll for North America).
Employee Tax Data USA Component	TAX_DATA	(USA, USF) Enter and maintain the tax information that the system uses to calculate taxes for employees. For more information, see “(USA) Entering U.S. Employee Tax Data” (PeopleSoft Payroll for North America).

New Hire Tasks Tile

Administrators use the New Hire Tasks tile to access a collection of frequently-used new hire administrative components.

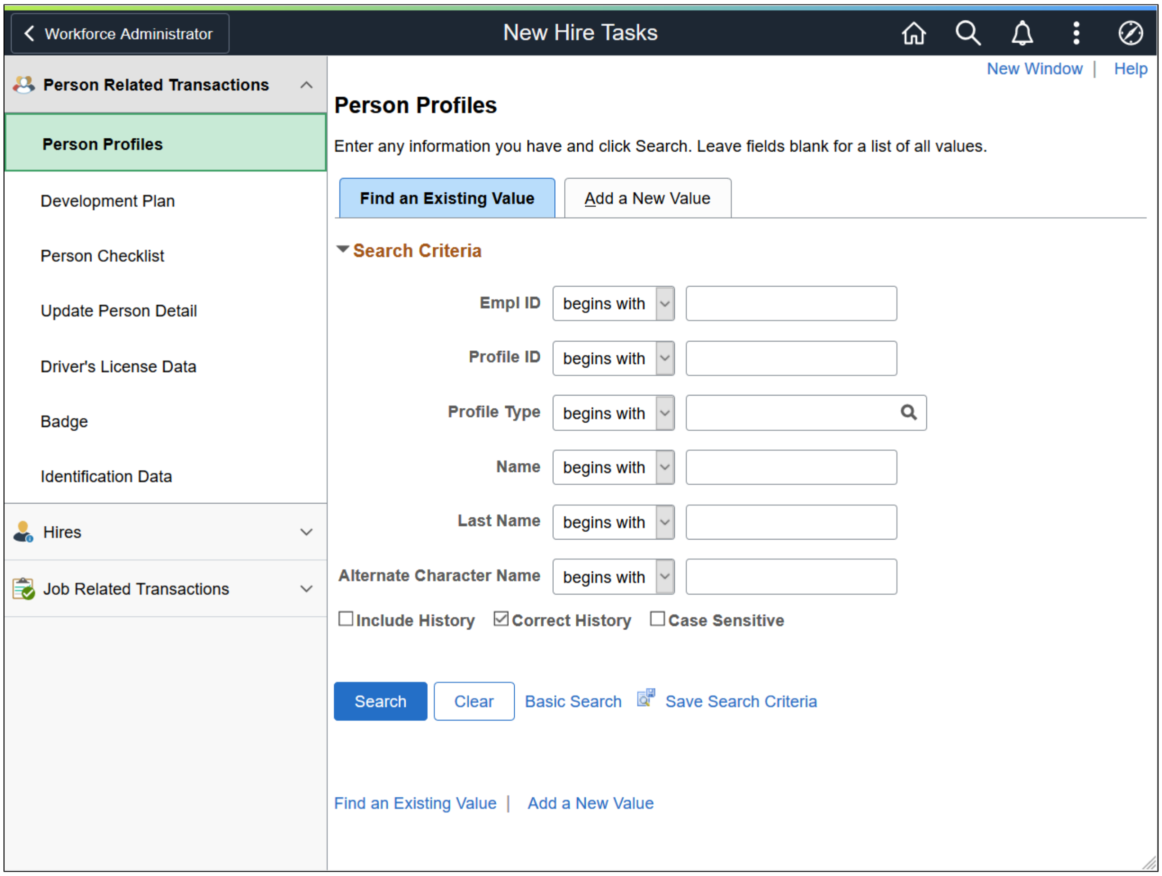
Navigation:

The New Hire Tasks tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

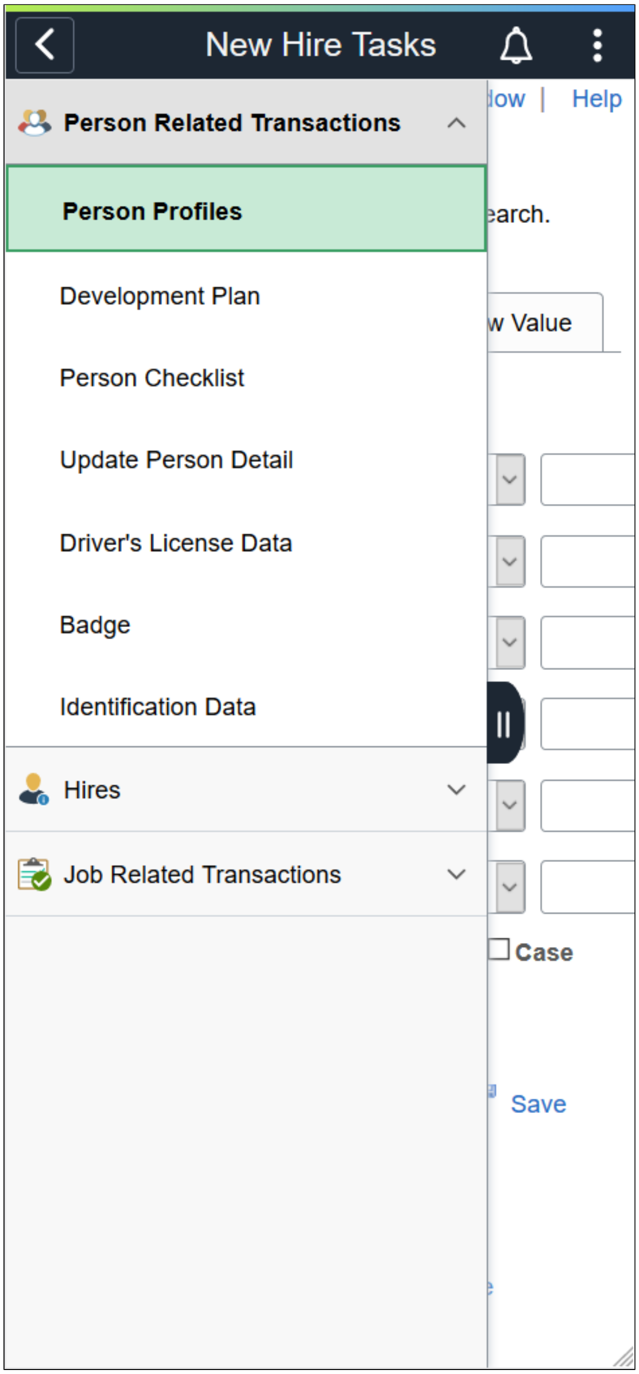
This example illustrates the New Hire Tasks tile.

Click the New Hire Tasks tile to access the New Hire Tasks application start page.

This example illustrates the New Hire Tasks application start page for the tablet.



This example illustrates the New Hire Tasks application start page for the smartphone.



This application start page is a navigation collection that enables administrators to access frequently-used new hire task components from one location. The left panel of this page lists the components collected under three categories:

- Person Related Transactions
- Hires
- Job Related Transactions

The right panel displays the component selected in the left panel.

Chapter 6

Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs

Organizational Relationships

Organizations have relationships with a variety of people for a variety of reasons. PeopleSoft enables you to manage the data of those people with whom you have an organizational relationship. A person can have more than one organizational relationship at any one time or can change relationships over time.

Organizational relationships fall into one of the following categories:

- Employee.

  A person who is hired to provide services to the organization and has a legal employee relationship with the organization.

- Contingent worker.

  A person who provides services to the organization and who does not have a legal employee relationship with the organization.

  Note: PeopleSoft Payroll for North America does not process payroll for contingent workers.

- Person of interest (POI).

  A person who is not an employee or contingent worker but is of interest to the organization. POIs can be:

  - COBRA participants.
  - Pension payees.
  - Stock - board members.
  - Stock - non-HR administered employees.
  - Global Payroll payees.
  - Campus Solutions persons.
  - External trainees.
  - External instructors.
  - Any person who fits within a POI type you've created.

- Applicants who require payment through Payroll for North America prior to being hired.

Note: Dependents, beneficiaries, emergency contacts, and health and safety physicians are not captured as POIs.
These topics refer only to those people with organizational relationships.

Personal Information Data for People with Organizational Relationships

The system requires the same personal information regardless of a person's organizational relationship, so all people with an organizational relationship are added to the system using the Personal Data components (PERSONAL_DATA or PERSONAL_DATA_FL). This enables you to simplify data entry and maintenance and to use a single, unique identification code for people as you add new organizational instances for them or as their relationships to the organization change.

The generic classic Add a Person component is on the Administer Workforce menu and the fluid Add Person tile is on the Manage Human Resources dashboard, but there are additional components on the menus of other applications enabling you to create records for people of interest specifically for that application. For example, you can add PeopleSoft Global Payroll payees on the Add a POI Payee component (PERSONAL_DATA) on the **Global Payroll & Absence Mgmt** > **Payee Data** menu.

Note: Enter people whose relationship to the organization does not constitute an organizational relationship, such as emergency contacts or beneficiaries, on specialized components throughout HCM. The identification number can be labeled as EmplID, Person ID, or ID. These fields all refer to the same identification number. Do not assume that a field labeled EmplID refers to employees only.

See Understanding Identification Assignment.

Organizational Instances

An organizational instance is a single occurrence of an organizational relationship. After you create a personal information record for a person, create an organizational instance to enter and maintain job records. An organizational instance has its own hire date and contains the accumulation of the person's job data records that are associated with that instance.

Use one of the following components to create an organizational instance:

<table>
<tr><th>Classic Components</th><th>Fluid Components</th></tr>
<tr><td>

Add a Person (PERSONAL_DATA)

Create a person and an organizational instance from one location using classic pages.
New Employment Instance (JOB_DATA_EMP).
New Contingent Worker Instance (JOB_DATA_CWR).
Template-Based Hire (HR_TBH_EULIST).

Note: Templates must be created first before the template-based hire component can be used.
Add Person of Interest Job Relationship (JOB_DATA_POI).

Note: Access this component from the Administer Workforce menu when you select a POI type that requires a job record. Otherwise, this component is available, under varying names, on the menus of applications that process POIs with jobs.

</td><td>

Create a person and an organizational instance from one location using fluid pages use the following fluid tiles (JOB_DATA_ADD_FL component):

<u>Create Employee Tile</u>
<u>Create Contingent Worker Tile</u>
<u>Create Person of Interest Tile</u>

Create an organizational instance using fluid pages when a person already exists in the system.

<u>(Fluid) Organizational Relationship Tile</u> or <u>(Fluid) Organizational Relationship Page</u>

</td></tr>
</table>

Note: Hire applicants with data that is in the system by using the Hire component (ER_APP_HIRE_LAUNCH) in PeopleSoft Talent Acquisition Manager.

See "Hiring Applicants" (PeopleSoft Talent Acquisition Manager).

Update and maintain job data for the instances using the following components:

Classic Pages	***Fluid Pages***
• Job Data component (JOB_DATA) • Current Job component (JOB_DATA_CURRENT)	<u>Manage Job Tile</u> (JOB_DATA_FL component)

Organizational Instances for People of Interest

PeopleSoft delivers a number of different POI types that you can activate and use as needed. The following types require job records:

- COBRA qualified beneficiaries.
- Pension Payees.
- Stock - board members.
- Stock - non-HR employees.
- Global Payroll payees.

- Student refunds.

Some of the POIs you may want to track will not require a job record. If you are tracking POIs without jobs, you will need to use the Add a Person of Interest component (PERS_POI_ADD) in classic or (Fluid) Maintain Person of Interest Tile (PERS_POI_MAINT_FL) in fluid to indicate what kind of POI relationship the person has, as well as to enter any necessary security parameters to control access to the person's data.

Example: A Person with Three Organizational Instances

Mario Estevez needs to successfully complete training with a third-party vendor before starting his new position. To reimburse Mario for the cost of the training, he needs a job record. The human resources administrator adds him in the system by using the Add a Person component and assigns him the ID 1234. The administrator then creates a POI job record for him by using the Add Person of Interest Job component.

After Mario completes his training, he joins the company as an employee. The human resources administrator terminates his POI instance (by using the Job Data component) and creates an employment instance by using the Add Employment Instance component.

A little more than a year after joining the company, Mario is given the opportunity to participate in a short-term project. The human resources administrator creates a contingent worker instance for him on the Add Contingent Worker Instance component.

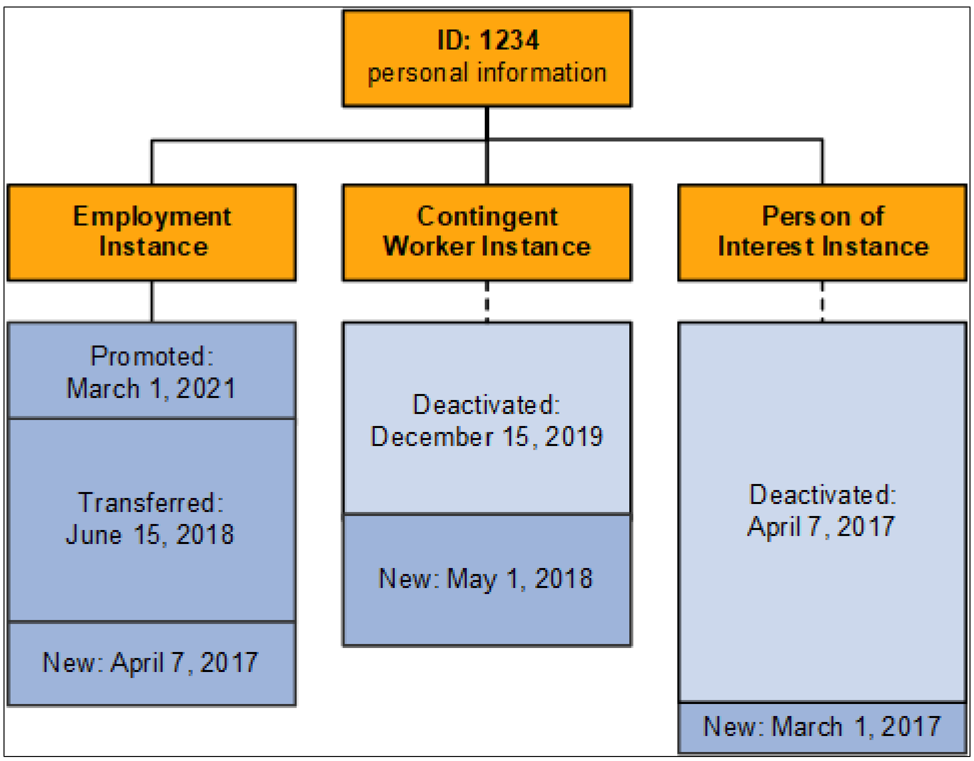
Mario is later transferred and promoted in his employee job, and a new job data row is inserted for each of these changes. The historical job records accumulate under the organizational instance in which they are created. The human resources administrator updates the job records for the employment and contingent worker instances by using the Job Data component.

This table lists the changes to Mario's job records over a four-year period:

Action Date	***Employment Instance***	***Contingent Worker Instance***	***POI Instance***
March 1, 2017			POI instance created.
April 7, 2017	Employment instance created with this date as the hire date.		POI instance job record deactivated.
May 1, 2018	No change to employment job record.	Contingent worker instance created with this as the hire date.	
June 15, 2018	Transferred departments	No change to the contingent worker job record.	

Action Date	***Employment Instance***	***Contingent Worker Instance***	***POI Instance***
December 15, 2019	No change to employment job record.	Contingent worker job ends and the job data record is deactivated. This date is the termination date for this instance.	
March 1, 2021	Promoted.		

This diagram illustrates how the system stores Mario's data: under the person record, there are separate employee, contingent worker, and POI organizational instances, each with its own event history:



Employment Record Numbers

Employment record numbers (ERNs), in combination with a person's ID, uniquely identify a person's job data records. The system distinguishes between a person's organizational instances by using a new ERN when you create a new instance.

The system also creates a new ERN when you create a job data record in the following circumstances:

<table>
<tr><th>Action</th><th>Comments</th></tr>
<tr><td>Create concurrent jobs, including:

Additional assignments.
Additional organizational instances.
(JPN) Additional appointment (kenmu).
(CHE) Multicontract.
</td><td>
Use the Add Additional Assignment component (ADD _PER_ORG_ASGN) to add an additional job (using the action of Add Additional Job) to the one an employee or contingent worker already holds. This job is added to an existing organizational instance, retains the employment dates of the original job, and is terminated if you terminate the original job.
<hr>
Note: Access the Concurrent Job Data component (JOB_ DATA_CONCUR) from the Add Additional Assignment component.
<hr>
Use the Add Employment Instance component or Add Contingent Worker Instance component to create an additional organizational instance for a worker using the action Hire. This job record is not tied to any other jobs that the worker holds, has its own job data, and has its own hire dates. HIR is used in the Add Employment Instance only. The Add Contingent Worker Instance component uses the ADD action.

<hr>
Note: Additional organizational instances are identified as hires on human resources reports and additional assignments are not. Use this distinction to guide how you enter additional jobs in the system.
If you do not need to distinguish between concurrent jobs, choose one method of entering concurrent jobs and use it consistently.
<hr>
See (Classic) Adding Organizational Instances.

See Adding Additional Assignments.

See Understanding Additional Appointments.</td></tr>
<tr><td>Create a global assignment (employees only).</td><td>Use the Home/Host Information component (HOME_ HOST_DATA) to create a global assignment job record. The system gives the global assignment (host) job record a new employment record number to distinguish it from the employee's original (home) job record.

See “Understanding Global Assignment Tracking” (PeopleSoft Human Resources Track Global Assignments).</td></tr>
<tr><td>Create a temporary assignment, including Japanese intercompany transfer (shukkou).</td><td>When you assign a worker to a temporary assignment on the Job Data component, the system suspends the substantive job and identifies the temporary job record with a new employment record number.

See Entering Temporary Assignments.

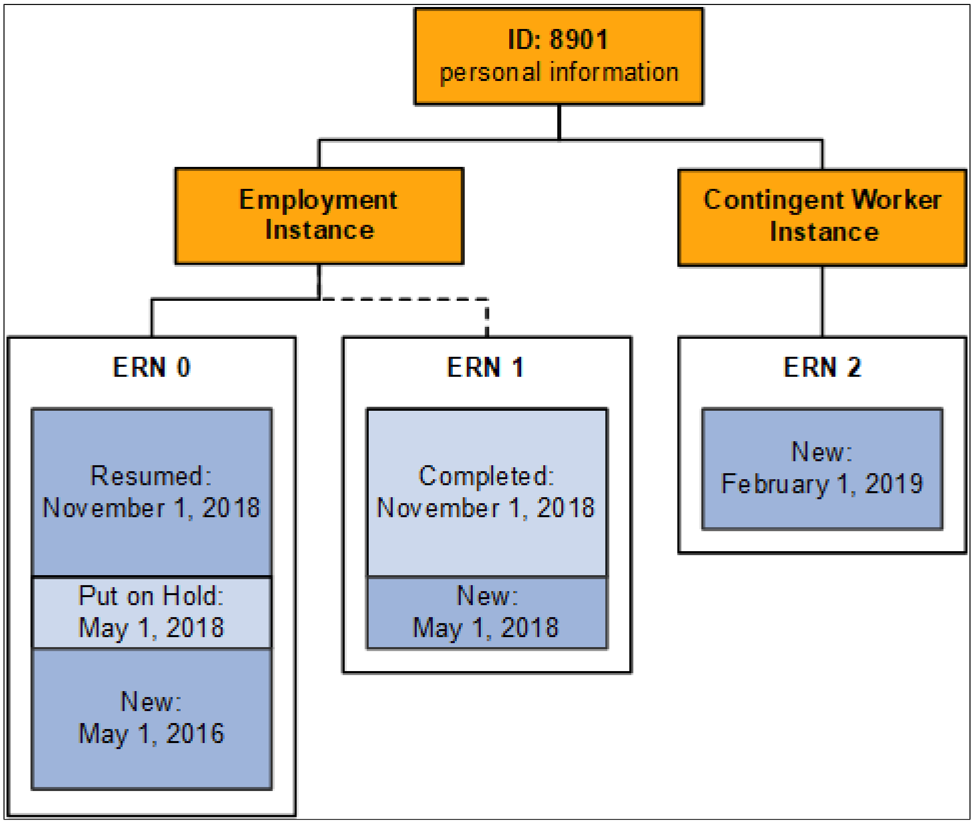
See Understanding Intercompany Transfer Tracking.</td></tr>
</table>

Example: A Person with Multiple ERNs

Jan Smith is hired to work in the sales division of Sutter Enterprises. After two years of outstanding performance, she starts a six-month temporary assignment in a subsidiary company to assist with the launch of a new application. At the end of the assignment she returns to her original job, but three months later she takes on a consulting role at the subsidiary in addition to her sales job. This table lists the changes to Jan's job records over the three-year period:

Action Date	*Employment Instance*	*Contingent Worker Instance*
May 1, 2016	Employment instance created. Job record identified by: • ID: 8901 • ERN: 0 • Organizational relationship: employee	
May 1, 2018	Substantive job suspended.	
May 1, 2018	New job record for temporary assignment created. Job record identified by: • ID: 8901 • ERN: 1 • Organizational relationship: employee	
November 1, 2018	Temporary assignment completed.	
November 1, 2018	Substantive job resumed.	
February 1, 2019	No change to employment job record.	Contingent worker instance created. Job record identified by: • ID: 8901 • ERN: 2 • Organizational relationship: contingent worker

This diagram illustrates Jan Smith's job records under the organizational relationships. Under the person record, there are separate employee and contingent worker organizational instances. There are two ERNs under the employment instance and one ERN under the contingent worker instance. Each ERN has its own event history:



Multiple Jobs

Workers who hold more than one active job at the same time under one organizational instance create unique requirements in People Soft Human Resources, Benefits Administration, Payroll for North America, and Pension Administration. If your organization allows a worker to hold multiple jobs, you must be able to:

- Combine the worker's job data to comply with regulatory requirements.
- Determine benefit and pension eligibility.
- Calculate deductions and credits for payroll processing.

These topics discuss:

- Multiple employment records compared to multiple jobs.
- Multiple jobs and PeopleSoft Human Resources.
- Multiple jobs and Base Benefits.
- Multiple jobs and PeopleSoft Benefits Administration.

- Multiple jobs and Payroll for North America.
- Multiple jobs and PeopleSoft Pension Administration.

Multiple Employment Records Compared to Multiple Jobs

A person can have multiple ERNs without holding multiple jobs.

A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.

  The two organizational instances have their own job records, each identified by a unique ERN.
- A substantive job and a temporary job where the substantive job is suspended.

People have multiple jobs when they have:

- More than one active contingent worker organizational instance.
- More than one active employment organizational instance.
- A substantive job and an additional assignment where the substantive job is not suspended.

Note: Multiple jobs processing does not apply to person of interest job records.

Examples of multiple jobs include these methods:

Multiple Job Method	***Description***
Concurrent Jobs (separate job instances)	• Tracks multiple permanent employment relationships. • Each instance is entirely separate – terminating one has no affect on the other. There is no linkage between the two employment records. • Each instance is created with the *HIR* action (or *ADD* if a contingent worker). • Each instance can be of a permanent or a temporary nature. • Each instance has its own payroll and compensation data. Either, both, or none can be paid. • Benefits data can be combined using the Benefits Rcd Nbr. • Both employment record numbers are available for matching processes in PeopleSoft. • Both employment records are active.

Multiple Job Method	***Description***
Additional Assignment	• The additional assignment is linked to the permanent job (instance). The new employment record is linked to an existing employment records. • The additional assignment is created with the *ADL* action. • An additional assignment can only be active if the first instance is active (Active, Leave of absence, Leave with Pay, Suspended, Short Work Break). • An additional assignment is automatically terminated when the main instance is terminated. The new employment record can only be active during the time period that the existing employment records is active. • An additional assignment can be completed and reactivated at any time during its controlling instance's active status period. • An additional assignment must be of the same organizational relationship type as its controlling instance. • An additional assignment can be promoted to its own instance if needed (but the history of its linkage to the original instance is lost). • Both employment records are available for matching processes in PeopleSoft. • Either, both, or none can be paid. • Both employment records can be active at the same time.

Multiple Job Method	***Description***
Global Assignment	• Tracks temporary assignments while maintaining the employee's relationship with their home (or permanent) job. • Provides additional information tracking for vehicles, dependents, schools, homes, travel details, and additional earnings and deductions. • The additional (host) assignment is linked to the home job. The new employment record is linked to an existing employment record. • The host assignment is created with the *ASG* action. • A host assignment can only be active if the home instance is active. • A host assignment is automatically terminated when the home instance is terminated. If the existing employment record is terminated, this new one is terminated as of the same day. • A host assignment can be completed and reactivated at any time during its controlling instance's active status period. • A host assignment is only available for the Employee relationship. • A host assignment can be promoted to its own instance, but the history of its relationship to the original home instance is lost – except within the actual Track Global Assignments Assignment record. • Host assignments do not have their own compensation data. • Both jobs are available for matching. • Both employment records are active.

Multiple Job Method	***Description***
Temporary Assignment	• Enables the tracking of temporary assignments while maintaining the employee's relationship with their permanent job. • The original instance is copied to a temporary employment record and is put in a suspended status. Changes can still be applied to this suspended assignment including position incumbent updates – but payroll is never run on this assignment. Only the temporary employment record can be paid. • The temporary assignment data is loaded into the original instance employment record. • When the temporary assignment ends, the suspended instance data is copied back into the original employment record from its latest effective date (only the latest effective date row is copied – the history of changes made to it are still kept in the suspended employment record, like a mass pay change). • The data on the existing employment record is suspended for the duration of the temporary one.

This chart provides information about multiple jobs methods and the relationship between the initial job instance and the concurrent job:

New Assignment Type	***Both Jobs Can Be Active***	***Primary Instance (Home) Must Be Active***	***Both Jobs Can Be Paid***	***Job History***	***Job Status Automation Process***	***Both Can Be Matched in the Career Matching Processes***
New Instance	Yes	N/A	Yes	Separate	No	Yes
Additional Assignment	Yes	Yes	Yes	Separate	Additional job is terminated if the primary instance is terminated	Yes
Global Assignment	Yes	Yes	Home only	Separate	Host is terminated if Home is terminated.	Yes
Temporary Assignment	Yes	No – Temporary assignment only	Temporary only	Temp data is captured in Instance History	Suspended job can be automatically reactivated when the temporary is done.	No

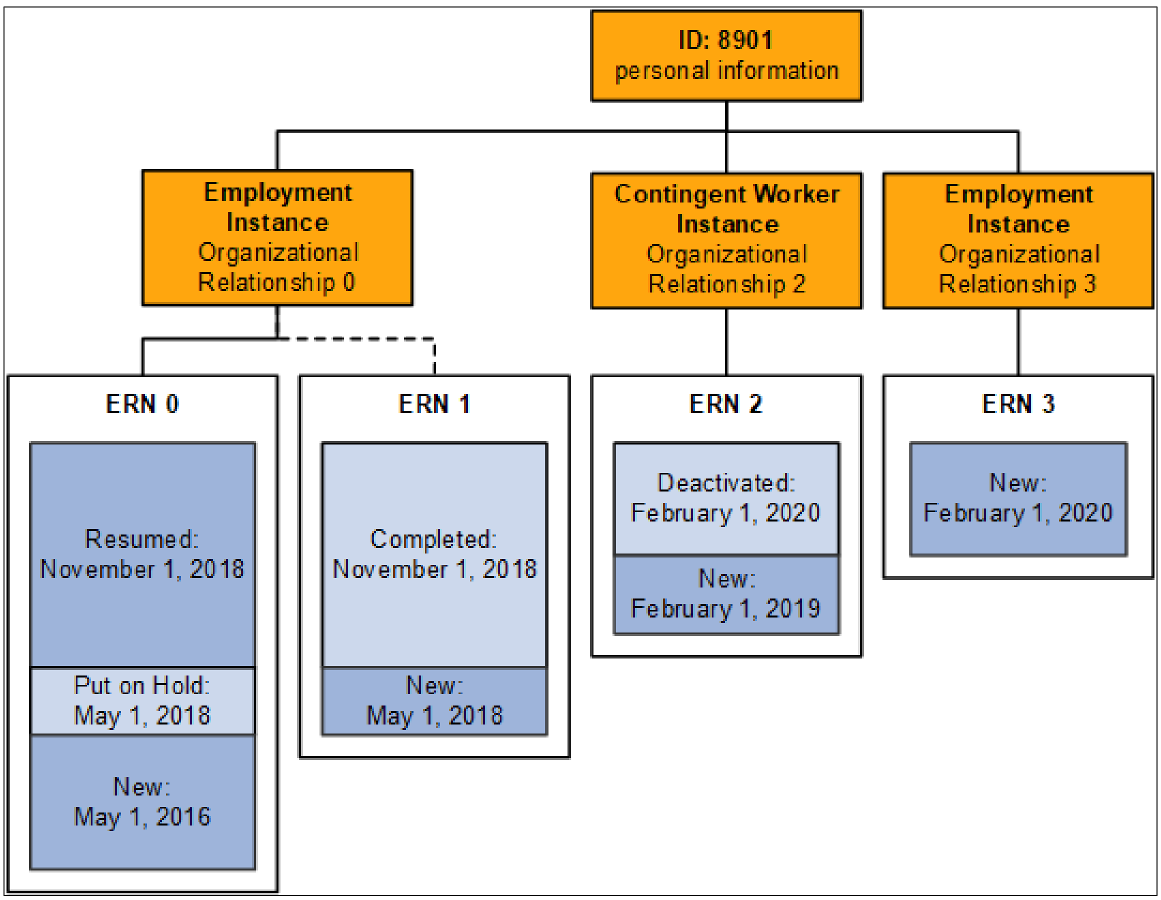
See Multiple Jobs.

Example: A Person with Multiple Jobs

As of February 1, 2019, when Jan Smith begins her contingent worker relationship with the organization, Jan Smith does not have multiple jobs. She has an active employment job record and an active contingent worker job record, distinguished in the system by their ERNs.

On February 1, 2020, when Jan has held the consulting job at the subsidiary company as a contingent worker for a year, management decides to make the job permanent. This requires creating a new employment job record in addition to the original job record. Jan Smith now has multiple jobs.

This diagram illustrates Jan Smith's organizational relationships and job records after the changes of February 1, 2020. A second employment instance has been added alongside the existing employment instance and contingent worker instances. The new employment instance has its own ERN and event history:



Multiple Jobs and PeopleSoft Human Resources

When a worker holds multiple jobs, each job must have its Job Data record. When you enter an additional job, you need to make two decisions:

- For reporting purposes, which of the worker's jobs is the primary job.

  You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.

- Whether the worker's jobs will share a benefits program or have separate benefits.

  The system provides flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way that it treats the worker's first job.

Maintain Multiple Concurrent Military Ranks

PeopleSoft enables customers to track multiple and concurrent job employment through Administer Workforce job data. For military organizations this means the system maintains and manages multiple concurrent ranks for a single service member with concurrent jobs. This functionality enable organizations to track multiple jobs and ranks through one of or a combination of the following examples:

- Concurrent jobs or new instance – two or more separate permanent employment instances not related to each other.

  For example, a service member has responsibilities in two separate departments: two positions in two departments. This is common in staff positions.

- Additional assignments – the new employment record is linked to an existing employment record where the additional job is only active if the primary employment instance is active.

  For example, a Maritime Patrol Aircraft service member is also Safety Officer within the same unit. Here the member has two jobs in the same department; this is referred to as "collateral duty."

- Temporary assignments – track temporary assignments while maintaining the employee's relationship with their permanent job which is copied to a temporary employment record and put on a suspended status. When the temporary assignment ends, the suspended instance resumes as it did before the temporary assignment began.

  For example, a service member goes out for an assignment or training and then comes back to the original, permanent duty station job.

Multiple Jobs and Base Benefits

Some of the issues regarding the PeopleSoft Human Resources Base Benefits business process and multiple jobs are:

- Which job is the worker's main, or primary, job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs are used for calculating deductions and contributions?
- How are the deductions or contributions calculated?
- When do you take deductions and when do you apply credits?

Designate the Primary Job for Benefits

You may want to base a worker's eligibility for benefits on a single job. This is called the *primary job* (not to be confused with the primary job for PeopleSoft Human Resources reporting purposes). The system also uses the primary job to associate payroll deductions for benefits with a specific job. Each benefit record number (group of jobs) that you designate for a worker has one job designated as the primary job.

When you create a job record for a person, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Jobs Flag page (BN_PRIJOBS_MAINT). As you create other Job Data records for a person, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job Flag page would look like for an employee who is a professor and dean at a university and a doctor at the university hospital:

Job Title	***Employee Record Number***	***Benefit Record***	***Primary Job?***
Professor	0	0	Yes
Dean	1	0	No
Physician	2	1	No

The primary job flag is used throughout the system to:

- Determine when a deduction should be taken.
- Identify the job that will provide the service date and the termination date.

The designation of a worker's primary job is effective-dated and can be changed anytime from a data maintenance page. Also, because the action of starting a new, concurrent job or terminating an existing job usually affects the determination of the worker's primary job, you can define rules that redesignate the primary job when one of these job actions is entered into the system.

For other actions (such as a job moving from full-time to part-time status), you can also indicate whether the system sends a work list entry to the Benefits Administrator through PeopleSoft Workflow for review.

Group Jobs to Determine Benefit Eligibility

When workers hold multiple jobs, they may be eligible for different offerings of benefits, based on the combination or mix of the jobs that they hold. Conversely, they may be eligible for certain offerings based solely on the fact that they hold a particular job.

Multiple jobs introduce the concept of a *benefit record number.* If an worker is eligible for multiple sets of benefits (or possibly multiple benefit programs), then you enroll the worker in those benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The benefit record number is the mechanism that is used to group concurrent jobs for benefits eligibility and enrollment purposes.

All enrollments for benefits are specific to a benefit record number.

Maximum Number of Concurrent Jobs

A worker can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll for North America can process only 50 benefit record numbers on one paycheck.

Calculate Benefit Deductions

The same grouping method that is used to determine eligibility can be used to calculate deductions. You can group jobs to calculate a deduction that is based on the worker's salary. Typically this involves calculating coverage and related premiums for Life and Disability plans that are based on the worker's salary or compensation rate. You calculate the coverage and deduction based on:

- The salary of the primary job.
- The summed salaries from a group of jobs.

When you designate the primary job for a benefit record, the system ties all deductions for the benefits that are associated with this benefit record to this job. Benefits deductions are taken only from checks by which the associated primary job is paid. This assures that deductions are taken at the proper frequency when the individual jobs in a group are paid on different frequencies or on separate checks.

When jobs are combined into a single check for all benefits record numbers, the benefits deduction for the different benefit record numbers is printed as separate detail lines.

Apply Regulatory Contribution Limits

When applying regulatory limits to contributions for savings plans, the system takes into account all earnings and deductions that the worker has across multiple jobs, not just the job or jobs that are associated with the plan that is being limited.

The Retro Deduction and Imputed Income Adjustment processes reevaluate deductions over a specified period of time. Using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system recalculates deductions and compares them to the deductions that were originally calculated and taken.

The primary job indicators play an important role in the calculation of deductions. If changes are made to the primary job history that affect confirmed pay periods, and these changes involve a shift of pay frequencies, then the system might calculate a different deduction amount for this period than it originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off the primary job history for the adjustment period.

Percent of Gross Deduction Limits

Calculation rules can be set up with a percent of gross limit applied to a benefit deduction. Also, rate tables can specify the portion of a deduction that is subject to this percent of gross limit. Now that earnings from multiple jobs with different benefit record numbers can be combined into a single check, this can result in a different gross earnings amount being calculated than when these jobs were not combined into a single check.

When applying the Percent of Gross limit to a deduction, the system uses the entire gross earnings from the check, as opposed to just the gross earnings that are attributable to the jobs with the same benefit record number as the enrollment for the deduction that is being limited. This can result in different deduction amounts being calculated than were previously calculated.

Related Links

“Understanding Multiple Jobs” (PeopleSoft Human Resources Manage Base Benefits)

Multiple Jobs and PeopleSoft Benefits Administration

The major impact that multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering. Considerations are:

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- If a change affects one job, how do you determine the effect that it has on the other jobs?

Determine Eligibility with Multiple Jobs

The system uses Eligibility Rules to determine if a worker meets the organization's rules for enrollment in a benefit program or option. Eligibility Rules comprise three major components:

- Eligibility Criteria.
- Grouping Method.
- Evaluation Method.

Each component is tied to an Eligibility field within an eligibility rule. The Eligibility Criteria field defines the data values that determine eligibility or ineligibility. The status of the worker's Primary Job indicator and Include for Eligibility check boxes on the Primary Jobs table, together with the **Grouping Method** and **Consider Active Jobs Only** fields, define which jobs should be evaluated. Finally, the Evaluation Method component defines how the group of jobs should be evaluated.

With multiple jobs, you specify a grouping method. Grouping methods enable you to define which jobs to include when the system is evaluating the benefits for which an employee is eligible:

Term	***Definition***
All Flagged Jobs	Groups all jobs with the **Include for Eligibility** selected on Primary Jobs that are selected for all benefit record numbers.
Flagged Jobs in Benefit Record	Groups all jobs with the **Include for Eligibility** selected on Primary Jobs that are selected within the benefit record number of the event.
Primary Job in Benefit Record	Looks at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the **Consider Active Jobs Only** check box from the eligibility rule is also used. If this check box is selected, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or S are included when the grouping method is *All Flagged Jobs* or *Flagged Jobs in Benefit Record.*

Another component of the eligibility rule is Evaluation Method. Evaluation methods enable you control how the jobs that are selected from the grouping method are evaluated against the eligibility criteria, when determining whether the employee satisfies the eligibility rule:

Term	***Definition***
One or More in Group	At least one job in the group must satisfy the rule.
All in Group	All jobs in the group must satisfy the rule.
Sum	The sum of the eligibility field's data value from all jobs in the group must satisfy the rule.

For example, the table below lists the eligibility of the employee with three jobs when processing an event for Benefit Record 0 and the Eligibility Rule for the FTE file is:

- Minimum FTE must equal *1*.
- **Grouping Method** is *All Flagged Jobs.*
- **Consider Active Jobs Only** check box is selected.

Job	***Employee Record #***	***Benefit Record #***	***Primary Job***	***Include for Eligibility***	***Include for Deductions***	***FTE***
Professor	0	0	Yes	Yes	Yes	.50
Dean	1	0	No	Yes	Yes	.25
Physician	2	1	Yes	Yes	Yes	.25

All jobs are active, so the group consists of all the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Suppose that the Grouping Method is All Flagged BR. Then the group of jobs you evaluate is Empl_Rcd (employee record) 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

Benefits Credits and the Primary Job

PeopleSoft Benefits Administration posts credits for benefits to the Additional Pay tables under the employee record number that is equal to the benefit record number. During a pay calculation, the system loads deductions for benefits only if the primary job for the benefit record is being paid on the check that is being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular benefit record are loaded to the paysheet of the primary job only for that benefit record.

This means that during a pay calculation, the system (while processing a particular job) determines whether this is the primary job for the associated benefit record number. If it is, the system searches for the additional pay data, looking for benefits credit entries, for example Add'l Pay Reason = 'BAS' for *any* Empl_Rcd that is assigned to this benefit record.

All entries found are loaded to the paycheck. If this is not the primary job, no benefit credits are added to the check. This ensures that there is no "double dipping" of deductions and that the credits for benefits always appear on the same check as the corresponding deductions.

Trigger Events with Multiple Jobs

The primary job drives the processing of an event for a specific benefit record number. This job must have a benefit system flag set to BA - Benefits Administration. The primary job provides the company ID and the BAS Group ID data for the processing schedule.

There are three main categories of events:

- Events that are triggered though a direct change to employee data.
- Events that are inserted into the system manually on the BAS Activity page.
- Passive events.

If changes are made to a worker's job data that impacts the worker's primary job designation, Include for Eligibility flag, or Include for Deduction flag, the system generates an entry into the BAS Activity Table for a new type of trigger, the (MJ) MultiJob trigger. These triggers are generated with a Bas_Action code of MJC (MultiJob Change), which resolves to the system Miscellaneous Event, if a specific Event Class is not set up for this Bas_Action code. Events that are created as a result of a change to the Primary Jobs table process through the system as (MSC) Miscellaneous Events.

Some of these trigger types may affect a worker's eligibility for benefits across all Benefit Records. For example, the (TP) trigger (Pers_Data_Effdt) is generated when you change a worker's address. Because the Employee Address is not related to any particular job (or benefit record), this change could affect the eligibility for benefits across all of that worker's benefit records. Changes to the worker's age are not specific to a particular job. Because these types of changes can affect all benefit records for a worker the system creates an event for each benefit record that is held by the worker when it processes one of these triggers. This is also true for Passive Birthdate (PB) triggers that are generated as a result of processing Passive Events.

The system explodes the original trigger into a set of new triggers, one for each benefit record. You won't see these exploded triggers in the BAS Activity Table, because they're normally processed in the same Event Maintenance run in which they're created. Each exploded trigger generates a new event that has the same event class as the original trigger.

Other expanded triggers are generated as a result of the options that you configure. Because you can define eligibility rules with grouping methods that cross benefit record boundaries, you can't assume that the data changes that generate other types of triggers won't affect other benefit records.

For example, suppose that you change the example employee (professor/dean/physician) from Full Time to Part Time in one job. The three concurrent jobs provide multiple benefit records. As a result of changing the Full/Part Time indicator, the system generates a (TJ) Job trigger in the BAS Activity Table. This trigger contains the employee record and the corresponding benefit record of the job that is changed. If any eligibility rule uses a Grouping Method of *All Flagged,* meaning that jobs from any benefit record can contribute eligibility information for this benefit record, you need to expand these triggers. Carefully consider whether you want to activate this trigger explosion. It creates some overhead for the system to maintain and process. If you have eligibility rules that cross benefit record boundaries, then you should select Job Triggers, Passive Service Triggers, and Multi-Jobs Triggers in the Explode activity triggers to all Benefit Records group box on the Multiple Jobs Options page. If you have no such eligibility rules in your system, you can safely turn off the explosion for each trigger type.

Passive Events and Multiple Jobs

Service-based eligibility is based on the service date for the primary job. Because jobs outside of specific benefit records can be grouped, eligibility that is based on the service date can come from the primary job or from any other job in or outside a benefit record number. Therefore, the system creates a BAS Activity trigger for each job that it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

Mark Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. In prior versions, events were flagged for reprocessing consideration when a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior versions, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the "non-primary" Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. This flagging mechanism searches for, and flags all events for the employee that may have used the Job row indicated in the trigger. Although the system can't be sure that the Job row was used for eligibility purposes, it eliminates the risk of not flagging an event that should be considered for reprocessing.

Related Links

“Understanding Multiple Jobs” (PeopleSoft Human Resources Manage Base Benefits)
“Setting Up Eligibility Rules” (PeopleSoft Benefits Administration)

Multiple Jobs and PeopleSoft Payroll for North America

The multiple job functionality has the following effect on PeopleSoft Payroll for North America:

- Primary Pay Group

  When an worker has jobs in more than one pay group, you can designate a primary pay group that controls when deductions are taken from the worker's earnings and when instructions for deduction overrides apply. The worker's primary pay group is also the pay group for which a consolidated paysheet is built, if you activate the single check feature described below.

- Single Check

  If you activate the Single Check for Multiple Jobs feature in PeopleSoft Payroll for North America, you can produce a single check for workers with multiple jobs across pay groups within the same company. During the Paysheet Calculation process, the system creates a consolidated paysheet for the worker's primary pay group. The paysheet includes all of the worker's FLSA (Fair Labor Standards Act) calculations, taxes, benefits, and general deductions for all jobs with the same period end date; check date; FLSA period, if applicable; and payroll cycle (on- or off-cycle). Pay run IDs and pay frequencies that are associated with the jobs can differ.

- Deduction Limits

  Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America adjusts the Current Goal Balance for the appropriate jobs when deductions are taken.

- Union Dues

Union dues are deducted from earnings only when the job that's assigned the corresponding union code is paid.

- FLSA Overtime Rules

  PeopleSoft Payroll for North America fully complies with FLSA overtime rules for non-exempt workers. If a non-exempt worker has other exempt or non-exempt jobs in the same organization, the system calculates the correct overtime for any extra hours worked.

Related Links

PeopleSoft Payroll for North America

Multiple Jobs and PeopleSoft Pension Administration

PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number 0 for much of the information that is used in the pension benefit calculations.

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

- Confirmation of whether a worker has ever been eligible for pension benefits.
- Time line showing the periods of eligibility and ineligibility.

For a single-job environment, producing these results is a matter of examining a worker's only job record history. If a worker has multiple, concurrent jobs, the system determines plan eligibility based on all jobs. The system considers the worker to be eligible for a particular period if any of the jobs are eligible.

Multiple Jobs and the Primary Job Record

The system examines all of a worker's records and selects a primary record by choosing the first record that it finds in the following prioritized order of categories:

1. Overrides
2. Covered Active
3. Covered Inactive
4. Any Active
5. Any Inactive

If it finds more than one of any of these categories, it selects the lowest-numbered record in that category.

You can accept the system-calculated primary record or override it with your own definition of which job record should be the primary record. Do this by configuring your definition of which actions make a job active or inactive or by using the Primary Job Overrides page to designate a record of your own choosing as the primary record.

Related Links

"Pension Administration Business Processes" (PeopleSoft Pension Administration)

"Pension Administration Overview" (PeopleSoft Pension Administration)

Chapter 7

Managing Human Resources Person and Job Data Using Fluid

Understanding Fluid Person and Job Data

In an organization, people and their job records experience many changes like change of addresses or contact information, promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employees and their job data, the administrators regularly submit changes in PeopleSoft Human Resources.

The Manage Human Resources Dashboard tiles and pages provide simple to use, intuitive application for HR administrators and clerks to perform various person and job data request transactions. These are the fluid versions of the Person Data and Job Data transactions.

Fluid Manage Person and Job Data provides you with:

- A modern and customizable user interface to add, access, and update person and job data.
- The ability to perform searches for duplicate IDs before adding a new person in the system.
- A fluid-based configurable search page approach to find people and job records.
- Configurability of criteria-based activity steps to display only relevant steps and fields.
- Drop Zone pages to contain custom fields.
- The ability to attach relevant documents with a transaction, or disable the functionality using the Person and Job Installation configuration for fluid pages.
- Validation steps, which enhance the user experience of reviewing errors and warnings by allowing administrators to pre-validate data prior to submitting a data change.
- A summary of all job data transactions on one page.
- Configurable approvals.
- A review process to identify potentially impacted rows when you have added retroactive job data or made corrections to rows.
- Manage person of interest security access.

Note: You must be on PeopleTools 8.57.11 or higher to use the fluid Job Data features (Manage Job) and Person Data features (Add Person, Modify Person, Create <Organizational Relationship>, Organizational Relationship, and Maintain Person of Interest).

This topic provides an overview of the fluid Person Data and Job Data architecture, prerequisites to using the these fluid features, and lists roles and permission lists to access fluid Person Data and Job Data pages.

For additional information, see the PeopleSoft HCM: Job Data Modernization — Frequently Asked Questions (Doc ID 2691461.1).

These videos provide an overview of the Job Data Modernization feature:

Video: PeopleSoft Job Data Modernization

Video: Image Highlights, PeopleSoft HCM Update Image 36: Job Data Modernization for Human Resources

Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures

Using the fluid interface, administrators can search for individuals and then quickly create, process, and authorize person and job data transactions without navigating to multiple components throughout the system. The following components in fluid are set up using an activity guide process, where the user is given steps to enter person and job data transactions.

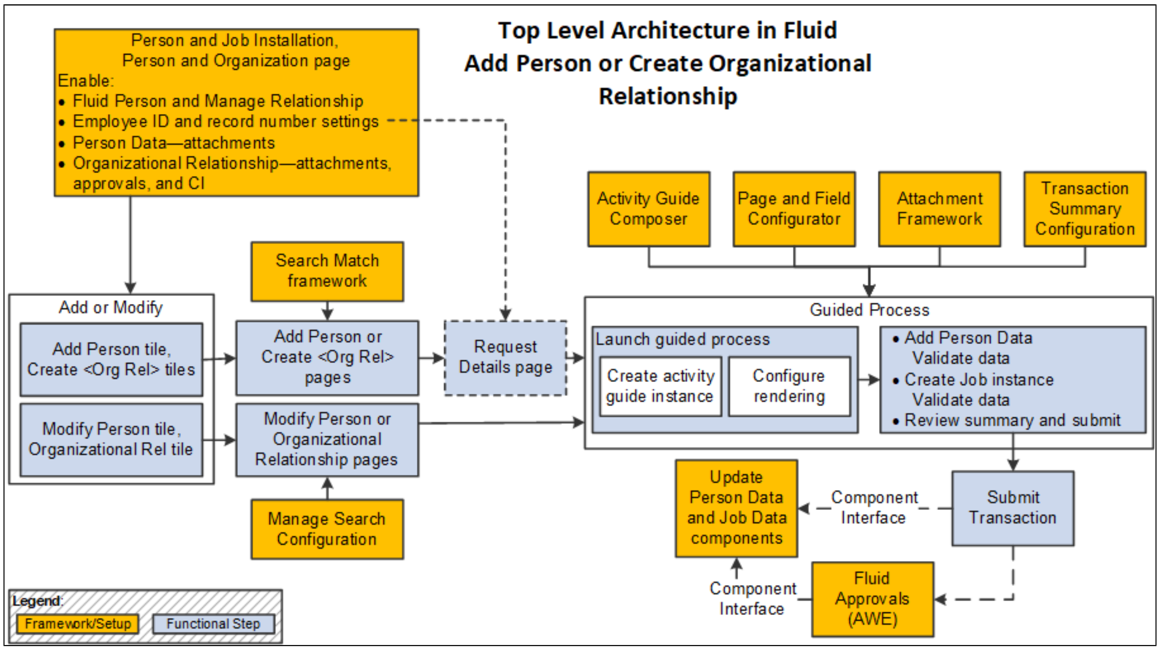
- Add Person Tile
- Modify Person Tile
- Create Employee Tile
- Create Contingent Worker Tile
- Create Person of Interest Tile
- (Fluid) Organizational Relationship Tile
- Manage Job Tile

In conjunction with the Page and Field Configurator utility, you can configure the process to display only the relevant steps and fields based on the action of a job transaction. To ease setup, the PeopleSoft application delivers pre-seeded Page and Field Configurator data to display steps and fields for all actions using the Manage Job component. Organizations can choose to use the delivered configuration as a starting point, review and determine if the delivered action-based configuration works, and make updates as needed. You can also easily configure multiple approval flows and view the synopsis of changes as an approver and as a requester.

Add Person, Create Employee, Create Contingent Worker, Create Person of Interest, Modify Person, or Organizational Relationship Flow

Using the fluid interface, administrators can quickly add new persons, create initial job data organizational instances, and maintain person data.

This diagram shows the high-level functional steps administrators will take to add a person, modify a person, or create an organizational relationship, and shows different configurations used to enable the functional steps.



Note: The light blue of boxes in the diagram show the functional steps while the orange boxes show the different configurations used to enable the functionality.

Prior to accessing and using the fluid Person and Job Data functionality, you need to assign roles and permissions to your users. See the User Roles for Fluid Person and Job Data section in this topic.

The following outlines the configuration and functional steps in the fluid add and modify Person Data and add Job Data (organizational relationship) process:

1. Enable Fluid Person and Manage Relationship functionality using the Person and Job Installation - Person and Organization Page.

   This is required for HR administrators to access the fluid tiles to add individuals and relationships in the system.

   Additionally, you use this page to enable other features like hiding the fields to enter an employee ID or employment record number, Fluid Attachments for person data and organizational relationships, add a customizable Component Interface (CI), and configure approval options.

2. Set up Search/Match functionality to search for potential duplicate person records in the system.

   When the HR administrator selects the Add Person or Create <Organizational Relationship> tiles and enters certain criteria, the system will use the Search/Match functionality to identify potential duplicate people in the system.

3. Set up search page configurations using the Manage Search Configuration pages (see “Pages Used to Set Up Search Configuration” (Application Fundamentals)).

   When the HR administrator selects the Modify Person or Organizational Relationship tiles, the fluid-based search criteria page appears to locate existing people in the system.

4. If you select to display the Employee ID or Employee Record fields for entry on the Person and Job Installation - Person and Organization Page, the user will be allowed to enter the employee ID or record number on the Request Details page.

5. Update supporting frameworks such as the Activity Guide Composer and Page and Field Configurator, as needed.

   When an HR administrator adds a person, with or without a job record, adds an organizational relationship for a person, or modifies existing fluid personal data, the guided process is enabled using the Activity Guide Composer framework. The process references the Page and Field Configurator to control the visibility of steps and fields in the activity guide based on Action. The PeopleSoft HCM system provides the activity guide templates and Page and Field Configurator settings for all delivered Actions.

   The fluid-based guided process also includes validation process. If there are any errors or warnings, the user can review and make changes to data before submitting.

   See also Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid and Pages Used to Add a Person Using Fluid.

6. Enable Fluid Attachments functionality using the Person and Job Installation - Person and Organization Page page and AWE framework.

   The activity guides enable you to include attachments within various sections, leveraging the Fluid Attachments Framework. You can also configure the installation settings to hide Attachment functionality for sections with Person Data or for organizational relationships if you do not want to use the Attachments feature.

7. Set up the Transaction Summary configuration (see "Configuring Transaction Summary" (Application Fundamentals)).

   HR administrators use the Summary step to review the information before submitting the person or job data. This step leverages the Transaction Summary configuration where you can configure fields that the HR administrator should review before submitting the action.

8. Configure Approvals functionality using the Person and Job Installation - Person and Organization Page and Approvals framework.

   Upon submit, the system checks to see if you have Approvals enabled. If enabled on the Installation pages, the Approval Workflow Engine (AWE Framework) configurations trigger approvals and route *Add Employee*, *Add Contingent Worker*, or *Add Person of Interest* changes for approval.

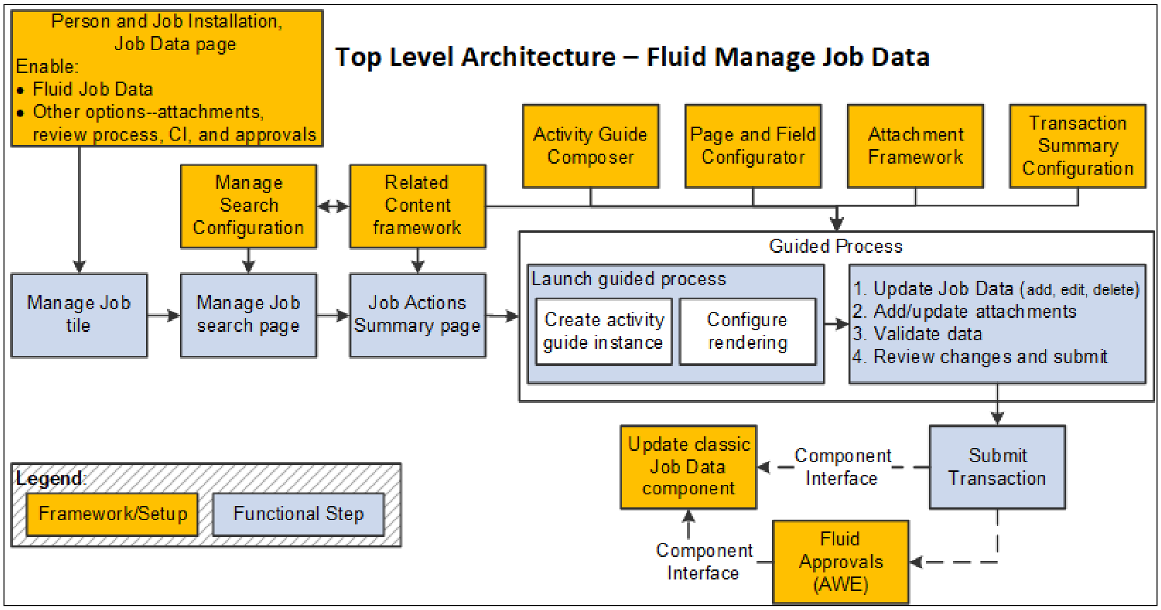
9. Use the Component Interface (CI) to update Person Data and Job Data.

   When an HR administrator submits the activity guide process, the system uses the CI to save data to core records.

Manage Job Flow

Using the fluid interface, administrators can quickly create, process, and authorize ongoing job data requests.

This diagram shows the high-level functional steps administrators will take using the Manage Job functionality and shows different configurations used to enable the functional steps.



Note: The light blue of boxes in the diagram show the functional steps while the orange boxes show the different configurations used to enable the functionality.

Prior to accessing and using the fluid Job Data functionality, you need to assign roles and permissions to your users. See the User Roles for Fluid Person and Job Data section in this topic.

The following outlines the configuration and functional steps in the fluid Job Data process:

1. Enable Fluid Job Data functionality using the Person and Job Installation - Job Data Page.

   This is required for HR administrators to access the fluid Manage Job Tile and ensures the use of the fluid version of Job Data when accessing Job Data links from Position Management and Guided Self Service pages.

   Additionally, you use this page to enable features like Fluid Attachments, the Review Process, add a customizable Component Interface (CI), and configure Approval Options. To add a customizable CI, you will first need to set up the Map Job Staging Records Page and Configure Job CI Page.

2. Set up search page configurations using the Manage Search Configuration pages (see “Pages Used to Set Up Search Configuration” (Application Fundamentals)).

   When the HR administrator clicks the Manage Job tile, the fluid-based Manage Job search criteria page appears. The PeopleSoft HCM system delivers the *Manage Job* configurable search configuration.

3. Use the Related Content Framework (RCF) to enable Related Actions in the search results and on the Job Actions Summary Page.

   Once HR administrators select an employee from the search results, they can review a summary of all Job Actions performed for an employee using the Job Actions Summary page. They can also initiate actions like add, edit, or view rows from this page, based on their access.

4. Update supporting frameworks such as the Activity Guide Composer and Page and Field Configurator, as needed.

   When an HR administrator adds or edits existing fluid Job Data, the guided process is enabled using the Activity Guide Composer framework. The process references the Page and Field Configurator to control the visibility of steps and fields in the activity guide based on Action. The PeopleSoft HCM system provides the *JOBDATA* activity guide template and Page and Field Configurator settings for all delivered Actions.

   The fluid-based guided process also includes a step called Validate Data, which allows HR administrators to validate data using Test CI. If there are any errors or warnings, the user can review and make changes to data before submitting.

   See also The Activity Guide Composer Framework for the Manage Job Component and Pages Used to Update Job Data Using Fluid.

5. Enable Fluid Attachments functionality using the Job Data Installation page and AWE framework.

   The Manage Job Data activity guide includes an Attachments step (see (Fluid) Job Data - Attachments Page, leveraging the Fluid Attachments Framework. Although the Attachments step is enabled by default in the guided process, you can use Page and Field Configurator to hide the Attachment step if you do not want to use the Attachments feature.

6. Set up the Transaction Summary configuration (see "Configuring Transaction Summary" (Application Fundamentals)).

   HR administrators use the (Fluid) Job Data - Summary Page step to review the changes made to job data before submitting the data. This step leverages the Transaction Summary configuration where you can configure fields that the HR administrator should review before submitting the action.

7. Configure Approvals functionality using the Job Data Installation page and Approvals framework.

   Upon submit, the system checks to see if you have Approvals enabled. If enabled on the Person and Job Installation table, the Approval Workflow Engine (AWE Framework) configurations trigger approvals and route *Manage Job* changes for approval and save Job Data.

8. Use the Component Interface (CI) to update Job Data.

   When an HR administrator submits the activity guide process, the system uses the CI to save data to core Job Data records.

Related Links

(Fluid) Adding a Person
(Fluid) Adding Organizational Instances
(Fluid) Pages Used to Update Personal Data
Adding and Reviewing Organizational Relationships
(Fluid) Updating Job Data

Prerequisites

Before you add a new person or job data instance using the fluid pages, you need to have completed the following:

- Set up the Administer Workforce control tables.

  See also the Related Information links.

- Set up the Administer Workforce country-specific control tables.

  See Understanding Country-Specific Table Setup.

- Configure the setup tables require to implement and use the Person and Job Data functionality to manage jobs using fluid.

  See Managing Configurations for Person and Job Data as an Administrator.

Related Links

“Understanding Regulatory Regions” (Application Fundamentals)
“Understanding PeopleSoft Security” (Application Fundamentals)
“Setting Up Implementation Defaults” (Application Fundamentals)
Defining Personnel Actions and Reasons
“Understanding Language Support in PeopleSoft” (Application Fundamentals)
“Setting Up Person of Interest Types” (Application Fundamentals)
“Defining Citizen Status Codes” (Application Fundamentals)
“Defining Job Subfunction and Job Function Codes” (Application Fundamentals)
“Setting Up Federal HCM Control Tables” (Application Fundamentals)
“Understanding Bank and Bank Branch Setup” (Application Fundamentals)
“Understanding Local Country Functionality Setup” (Application Fundamentals)

User Roles for Fluid Person and Job Data

Use the following roles to grant users access to perform various functions using the fluid Person Data and Job Data features.

Role	***Description***
Configurable Search Admin	Allows the user to create and update configurable searches for functional search pages throughout the system using the Manage Search Configuration component (see “Setting Up Search Configuration” (Application Fundamentals)).
Configurable Search User	Grants a user access to search pages using a configurable search.
HR Administrator Fluid	Gives access to the Manage Human Resources dashboard, Manage Job and Organizational Relationship tiles, Search, and Job Actions Summary pages.
HR Admin Add Person	Gives access to the Add Person tile, Search/Match, and related pages.

Role	***Description***
HR Admin Approver Fluid	Provides access to the *Create <Organizational Relationship>* and *Manage Job*-related transactions for Fluid Approvals. It also displays the **Edit Details** link on the Manage Job Pending Approvals page to the final approver for a new job request. This grants the approver access to the full Manage Job Data pages in fluid to make changes to a Manage Job request prior to completing the approval request.
HR Admin Contingent Worker	Gives access to the Create Contingent Worker tile, Search/Match, and related pages.
HR Admin Correction Apvr Fluid	Displays the **Edit Details** link on the *Manage Job* Pending Approvals page to the final approver when a correction was made to an existing job row. This grants the approver access the full Manage Job Data pages in fluid to make changes to a *Manage Job* request prior to completing the approval request.
HR Admin CWR Relationship	Allows the user, via the Organizational Relationship tile and pages, to add a contingent worker relationship for a person.
HR Admin EMP Relationship	Allows the user, via the Organizational Relationship tile and pages, to add an employee relationship for a person.
HR Admin Hire Employee	Gives access to the Create Employee tile, Search/Match, and related pages.
HR Admin Maintain POI	Provides access the to Maintain Person of Interest tile and page.
HR Admin Modify Person	Grants access to the Modify Person tile, search, and Person Data related pages.
HR Admin POI Payee	Gives access to the Create Person of Interest tile, Search/Match, and related pages.
HR Admin POI without Job	Allows the user, via the Organizational Relationship tile and pages, to add a person of interest relationship that exists in the system that does not have a job record with that relationship.
HR Admin POI Relationship	Allows the user, via the Organizational Relationship tile and pages, to add a person of interest relationship when that person needs to be associated with a job record.

Role	***Description***
HR Admin View Person	Provides view only access to the user in conjunction with data security considerations. Since these HR administrators will have display only access, the **View Details** button will be accessible to review Person Data, but they will not be able to create, edit, or delete a transaction.
HR Review Administrator	Grants the user the ability to delete in fluid Job Data. The user will be able to delete the rows he or she created with the following statuses: *Pushed back/Rework*, *Withdrawn*, *Denied*, and *Correction Denied*.
Job Data AG Administrator	Gives the administrator access to create or update the Activity Guide Template setup tables (see “Understanding the Activity Guide Composer” (Enterprise Components)). This role is required to make modifications to the Activity Guide template.
HR View Administrator	Provides view only access to the user. Since these HR administrators will have display only access, the **View Details** button will be accessible to review Job Data, but they will not be able to create, edit, or delete a transaction.

Permission Lists for Fluid Person and Job Data

The following are permission lists delivered for fluid Person Data and add Job Data:

- *HCCPHRFL3331* - Add Person
- *HCCPHRFL3332* - Modify Person
- *HCCPHRFL3333* - Create Employee
- *HCCPHRFL3334* - Create Contingent Worker
- *HCCPHRFL3335* - Create Person of Interest (with Job)
- *HCCPHRFL3336* - Add POI
- *HCCPHRFL3337* - Maintain POI
- *HCCPHRFL3338* - Organizational Relationship

  Additional roles for relationship flow:

  - HR Admin EMP Relationship
  - HR Admin CWR Relationship
  - HR Admin POI without Job

- HR Admin POI Relationship

- *HCCPHRFL3339* - View Person (vew only access)

The following are permission lists delivered for fluid Manage Job Data:

- *HCCPHR3316* - Fluid Job Data View Only
- *HCCPHR3314* - Edit Fluid Job Data

Managing Human Resources Tasks as an Administrator

This topic lists the pages that administrators can access from a single location in the PeopleSoft Fluid User Interface to access Human Resources configuration and administrative tasks for fluid Person and Job Data.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Manage Human Resources Tasks as an Administrator Using Fluid

Page Name	***Definition Name***	***Usage***
Manage Human Resources Tile	HC_MANAGE_HUMAN_RESOURCES (this is the cref for this tile)	Access the Manage Human Resources dashboard where you can access a variety of configuration and administrative components for maintaining person and job workforce information. This includes tiles to access the HR Administration navigation collection, configuration tables that will help you configure fluid Person and Job Data functionality, and tiles to add and maintain Person and Job Data using fluid. You can also add other tiles to the dashboard, such as HR Analytics
Manage Human Resources Dashboard	HC_MANAGE_HUMAN_RESOURCES PT_LANDINGPAGE	Access Human Resources person and job data-related tiles and pages.

Manage Human Resources Tile

Administrators use the Manage Human Resources tile to access the Manage Human Resources dashboard where they can access a variety of configuration and administrative components for maintaining person and job workforce information. This includes a tile to access the HR Administration navigation collection, another tile to access all the configuration tables that will help you configure Person Data and Job Data functionality for fluid, and several tiles to add and update Person Data and Job Data using fluid. You can also add other tiles to the dashboard, such as HR Analytics.

Note: You must be assigned the *HR Administrator Fluid* role to access this tile and pages.

Navigation:

Select the fluid home page to which you have added the Manage Human Resources tile.

Note: You can add the Manage Human Resources tile to any home page through personalizations. From the Personalize Homepage page, click **Add Tile**. Enter the tile name or navigate to **Workforce Administrator** > **Manage Human Resources**, select the tile, then save.

This example illustrates the Manage Human Resources tile.

Click the Manage Human Resources tile to access the Manage Human Resources Dashboard.

Manage Human Resources Dashboard

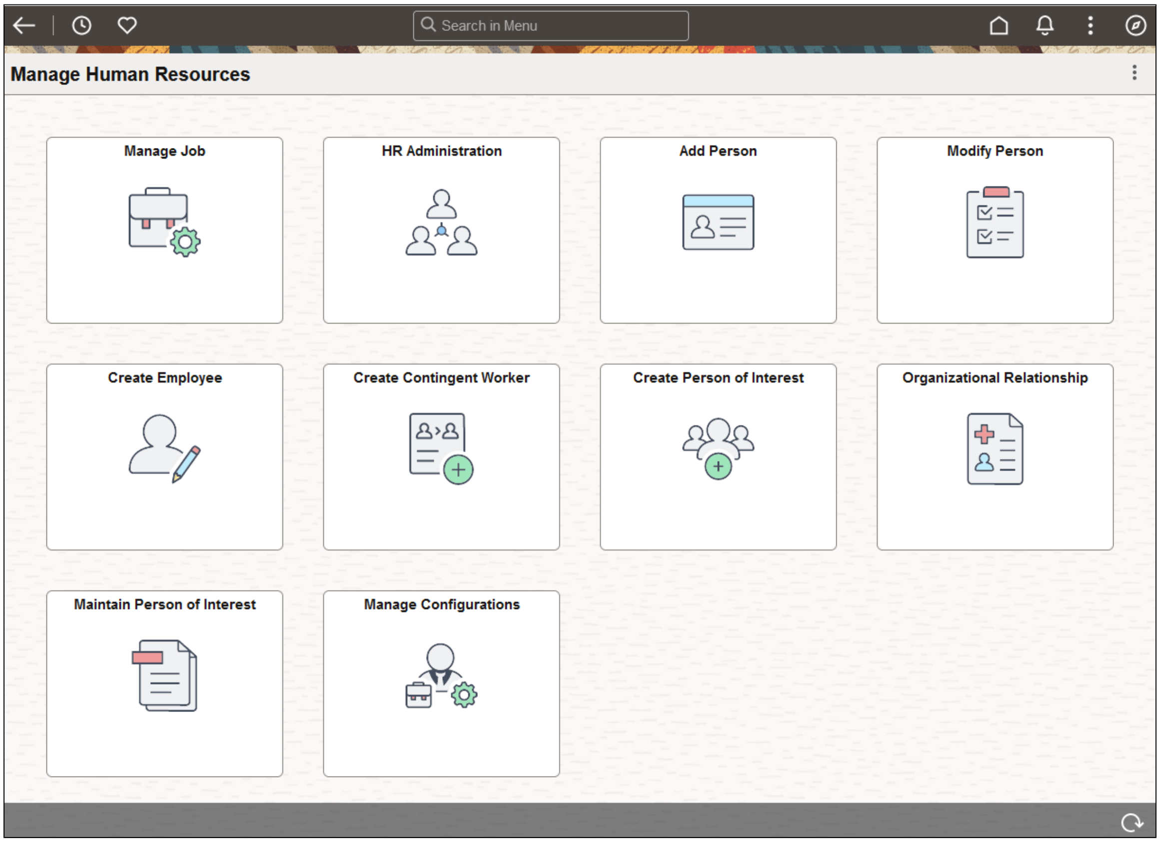
Use the Manage Human Resources dashboard (HC_MANAGE_HUMAN_RESOURCES) to access Human Resources person and job data-related tiles and pages.

Note: You must be assigned the *HR Administrator Fluid* role to access this dashboard.

Navigation:

Click the Manage Human Resources Tile from the fluid homepage to which you have added the tile.

This example illustrates the Manage Human Resources dashboard.



This Manage Human Resources dashboard enables administrators to access configuration, person data, and job data management-related components from one location in fluid.

Use the links in the table to access complete documentation for each transaction.

Tile Name	***Usage***
Manage Job Tile	Update and manage job data for your workforce using fluid pages.
HR Administration Tile	Access a collection of frequently-used HR administrative components.
Add Person Tile	Create a new Person Data record.
Modify Person Tile	Update an existing Person Data record.
Create Employee Tile	Create a new Person Data and Job Data record with an employee relationship.
Create Contingent Worker Tile	Create a new Person Data and Job Data record with a contingent worker relationship.

Tile Name	Usage
Create Person of Interest Tile	Create a new Person Data and Job Data record with a person of interest relationship.
(Fluid) Organizational Relationship Tile	Add or view a summary of a person's organizational relationships using the fluid pages.
(Fluid) Maintain Person of Interest Tile	Access the Maintain Person of Interest page in fluid and maintain a person of interest's POI security access keys.
Manage Configurations Tile	Access a collection of frequently-used Human Resources administrative components related to person and job data setup for fluid. Administrators with access to this tile will be able to enable, disable, or update any configurations related to fluid Person and Job Data functionality.

Users must be granted the proper roles to access these tiles and pages. For a list of role, see User Roles for Fluid Person and Job Data.

The following videos provide an overview and demonstration of how to use the fluid Person Data modification feature:

Video: Image Highlights, PeopleSoft HCM Update Image 47: Person Data Modernization

Video: Person Data Modernization

Managing Configurations for Person and Job Data as an Administrator

This topic lists the pages that Human Resources administrators can access from a single location from the PeopleSoft Fluid User Interface to perform person and job data-related configuration tasks.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Manage Configurations for Person and Job Data as an Administrator Using Fluid

Page Name	Definition Name	Usage
Manage Configurations Tile	HC_MANAGE_HR_CONFIG_NAVCOLL (this is the cref for the tile)	Access a navigation collection of the setup pages used to configure Person and Job Data for fluid.

Page Name	***Definition Name***	***Usage***
Person and Job Installation Component • Person and Job Installation - Person and Organization Page • Person and Job Installation - Job Data Page	HR_INSTALL_PER_REL HR_INSTALL_JOB	Activate fluid person and organization data, manage employee ID and record displays, and enable approvals and attachments for the different sections and organizational relationship types. Activate fluid Job Data. Define functionality settings for fluid Job Data to enable access from the Position Management and Guided Self Service (GSS) pages, attachments, approvals, and the review process.
Map Job Staging Records Page	HR_JOB_STG_TAG	Associate staging records to source records.
Configure Job CI Page	HR_JOB_STG_CFG	Add the staging record to the component interface record. The system will use this information to push the data from the staging records to the source records.
Manage Search Configuration Component • “Search Configuration Page” (Application Fundamentals) • “Add Configuration Page” (Application Fundamentals)	EOSF_SRCH_CONFIG_1 EOSF_SRCH_CONFIG_2	Create custom search pages.
“Register Transactions Page” (Approval Framework)	EOAW_TXN	Register the approval transaction.
“Configure Transactions Page” (Approval Framework)	EOAW_TXN_NOTIFY	Use the Configuration Transactions page to configure how the system uses the particular implementation of approval triggers.
“Setup Process Definitions Page” (Approval Framework)	EOAW_PRCS_MAIN	Define approval process stages.

Page Name	***Definition Name***	***Usage***
“User List Definition Page” (Approval Framework)	EOAW_USER_LIST	Create and maintain user-list definitions used for routing transactions for approval. Also, define user sources for use with steps in the approval process. If you are using the Query option to define the user list for approval workflow, then, when you are creating the query in the Query Manager component, you must set the Query Type value of the query to Process. Setting the Query Type value to User can cause an error.
“User Monitor - Monitor Approvals Page” (Approval Framework)	EOAW_ADM_MON_SRC	Approve and review transactions.
Approval Archive Viewer Page	EOAW_ARCHIVE	View archived approval transactions.
“Approval Authorization Page” (Approval Framework)	EOAW_AUTH	Authorize roles and approvers for dynamic paths.
“User Monitor - Monitor Approvals Page” (Approval Framework)	EOAW_ADM_MON_SRC	Approve and review transactions.
“Approval Monitor Configuration Page ” (Approval Framework)	EOAW_MONDIS_CONFIG	Configure the approval monitor.
Transaction Audit Report Page	EOAW_ADT_RUN_CNTL	Generate an approvals audit report that provides a complete list of approval transactions that have passed through the Approval Framework based on your run criteria. See also “Generating an Approvals Audit Report” (Application Fundamentals) and “Approvals Audit Report Page” (Application Fundamentals).
Mobile Approval Options Component • “Fluid Approval Setup - General Settings Page” (Enterprise Components) • “Mobile Approval Options - Transactions Page” (Enterprise Components)	HMAP_MBL_TYPE_SET HMAP_MBL_TYPE_SET2	Configure the general and transaction settings for Mobile Approvals.

Page Name	***Definition Name***	***Usage***
Page and Field Configurator Component • “Masking Page” (Enterprise Components) • “User List Page” (Enterprise Components) • “Map to Portal Registry Page” (Enterprise Components)	EOCC_CONFIG_MASK EOCC_CONFIG_USER EOCC_MAP_EVENT	Use these pages to configure masking, capture the list of users to which the configuration page should be applied to, and to map the configuration to the Portal Registry.
“Validate Page Configurations Page” (Enterprise Components)	EOCC_CONFIG_LOG	Use this page to verify the validity of the configurations defined using the Page Configuration page.
“Define Mask Profile Page” (Enterprise Components)	EOCC_MASK_PROFILE	Use this page to define Mask profiles.
“Define Field Group Page” (Enterprise Components)	EOCC_FIELD_GRP	Use this page to assign a default mask profile for a similar set of fields.
Categories Component • “AG Composer Categories - Category Page” (Enterprise Components) • “AG Composer Categories - Security Page” (Enterprise Components) • “AG Composer Categories - Context Page” (Enterprise Components) • “AG Composer Categories - Actions Page” (Enterprise Components) • “AG Composer Categories - Images Page” (Enterprise Components) • “AG Composer Categories - Assignees Page” (Enterprise Components) • “AG Composer Categories - Steps Page” (Enterprise Components) • “AG Composer Categories - Notifications Page” (Enterprise Components)	AGC_CAT_TBL1 AGC_CAT_TBL6 AGC_CAT_TBL2 AGC_CAT_TBL3 AGC_CAT_TBL4 AGC_CAT_TBL7 AGC_CAT_TBL5 AGC_CAT_TBL8	Create and manage activity guide categories that contain the technical components that are utilized to define an activity guide template.

Page Name	***Definition Name***	***Usage***
Templates Component (see "Activity Guide Templates Page" (Enterprise Components))	AGC_TMPL_SRCH_FL	Create and manage activity guide templates that identify the steps a user should take to perform a transaction or process.
"Define Notifications Page" (Enterprise Components)	AGC_CAT_NOTIF_DEFN	Create activity guide notifications.
"Process Notifications Page" (Enterprise Components)	AGC_NOTIFY	Process a batch or individual template notifications.
"My Processes Page" (Enterprise Components)	AGC_MYAG_DETAIL_FL	View and manage activity guide processes.
"Define Authorization Page" (Application Fundamentals)	HR_ATT_AUTH	Enter and maintain attachment authorization IDs which specify the level of user access for attachments.
"Define Authorization Entries Page" (Application Fundamentals)	HR_ATT_AUTH_ENT	Associate attachment authorizations with user roles.
"Define Attachments Page" (Application Fundamentals)	HR_ATT_CNFG	Associate attachments and their authorizations and create links on the page displayed in the target application.
"Configure Keys Page" (Application Fundamentals)	HR_ATT_KEYS_HDR	Define the prompt tables and key fields used by an application.
"Maintain Definitions Page" (Application Fundamentals)	HR_ATT_DEFN	Specify the attachment types available to an application. The context keys that appear on this page are determined by the Configure Keys component and are used to retrieve a list of valid Configuration IDs.
Configure Transaction Summary Component • "Configure Summary Fields Page" (Application Fundamentals) • "Map to Portal Registry Page" (Application Fundamentals)	HRTS_CONFIGURE HRTS_EVENT_MAPPING	Configure the fields that need appear on summary pages and select the portal registries to which this configuration applies.

Page Name	***Definition Name***	***Usage***
Configure Drop Zones Page	PTCS_CFG_SUBPAGE	Configure components containing configurable drop zones, including unregistered components. (See PeopleTools documentation *Application Designer Developer's Guide*, "Creating Page Definitions", Configuring Drop Zones)
Define Related Content Service Page	PTCSSERVICES	Link application pages with contextually relevant collaborative content, which creates opportunities for the user to view or quickly access information that supports, extends, and augments any PeopleSoft transaction. (See PeopleTools documentation *Portal Technology*, "Using the PeopleSoft Related Content Framework")
Manage Related Content Service Component	PTCS_SRVCFG_SRCH	Manage related content for content references, pivot grids, and MAP layouts. (See PeopleTools documentation *Portal Technology*, "Using the PeopleSoft Related Content Framework", Managing related Content Configurations and Data)

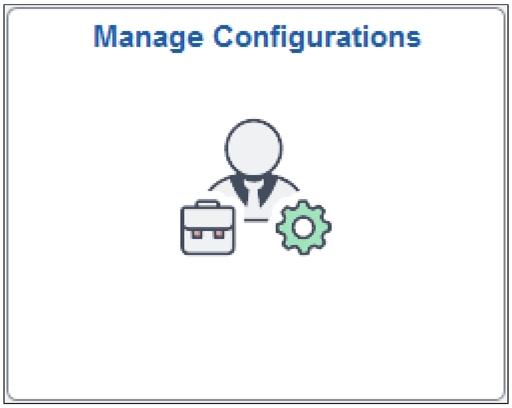
Manage Configurations Tile

Administrators use the Manage Configurations tile to access a navigation collection of setup pages used to configure Person and Job Data for fluid.

Navigation:

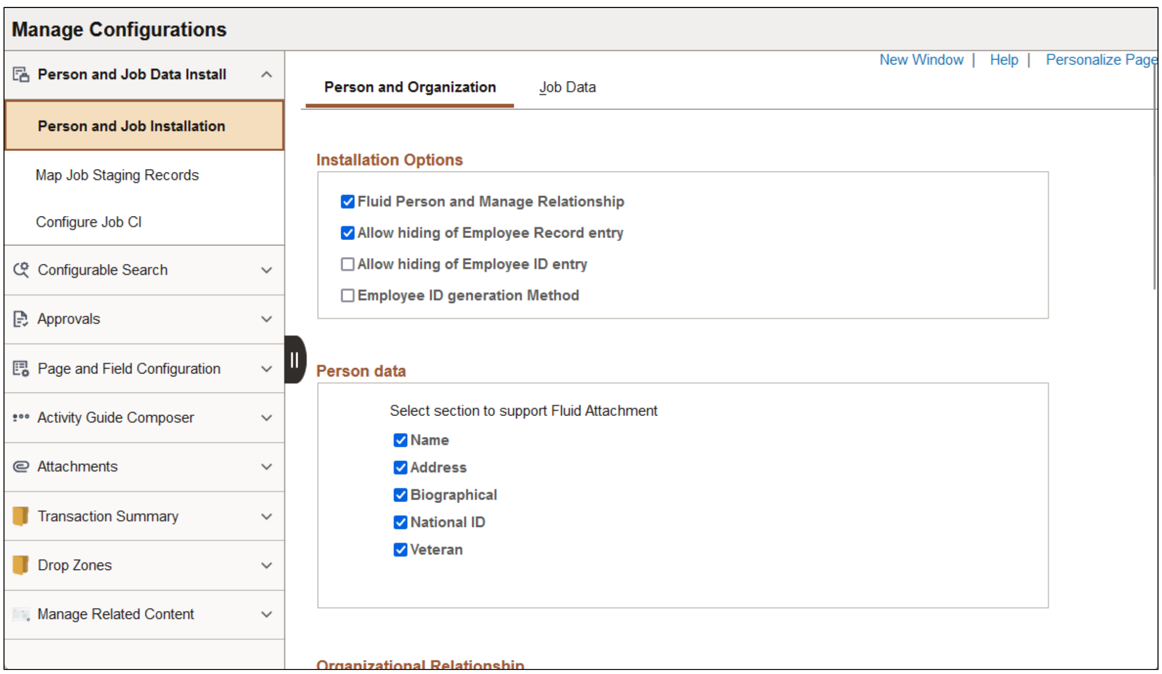
The Manage Configurations tile is delivered as part of the Manage Human Resources Dashboard, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Manage Configurations tile.



Select the Manage Configurations tile to access the Manage Configurations navigation collection.

This example illustrates the Manage Configurations application start page for the tablet.



This application start page is a navigation collection that enables administrators to access frequently-used HR administration setup components for fluid Person and Job Data from one location.

The application start page lists the components collected under these categories:

- Person and Job Installation
- Configurable Search
- Approvals
- Page and Field Configuration
- Activity Guide Composer

- Attachments
- Transaction Summary
- Drop Zones
- Manage Related Content

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the right panel displays the component selected in the left panel.

For small form factor devices, the application start page displays the categories and components. Select a component item to have the system take you to that component. Use the back button to return to the HR Administration application start page to select a new component.

Configuring Fluid Person and Job Data Installation Settings

Person and job data in fluid provides the workforce administrator with all the benefits of maintaining person and workforce job information in PeopleSoft via laptops, desktops, or mobile devices. In addition to enabling accessibility to these fluid components, you can configure the fluid Person Data- and Manage Job-related pages to:

- Display or hide the employee record number or ID entry fields.
- Determine the employee ID generation method.
- Allow a user to include attachments.
- Require approvals for organizational relationships and job transaction rows.
- Set up and use custom component interfaces.
- Enable the review process messaging when a person corrects or adds a historical job row.

To configure fluid person and job installation settings and capabilities, use the Map Job Staging Records (HR_JOB_REC_CON), Configure Job CI (HR_JOB_STG), and Person and Job Installation (HR_INSTALL_JOB) components.

Note: For information on rules for creating custom staging records and the structure/record relationship with classic Job Data, see the Technical Paper titled *PeopleSoft 9.2 HCM Fluid Job Data – Manage Customization* available on My Oracle Support.

This topic discusses configuring the fluid Person Data and Job Data installation settings.

Pages Used to Configure Fluid Person and Job Data Installation Settings

Page Name	*Definition Name*	*Usage*
Map Job Staging Records Page	HR_JOB_STG_TAG	Associate staging records to source records. The mapping done on this page will be provided by default to the staging records on the Configure Job CI page.
Configure Job CI Page	HR_JOB_STG_CFG	Add the staging record to the component interface record. The system will use this information to push the data from the staging records to the source records.
Person and Job Installation - Person and Organization Page	HR_INSTALL_PER_REL	Activate fluid person and organization data, manage employee ID and record displays, and enable approvals and attachments for the different sections and organizational relationship types.
Person and Job Installation - Job Data Page	HR_INSTALL_JOB	Activate fluid Manage Jobs. Define functionality settings for fluid Job Data to enable access from the Position Management and Guided Self Service (GSS) pages, attachments, approvals, and the review process.

Map Job Staging Records Page

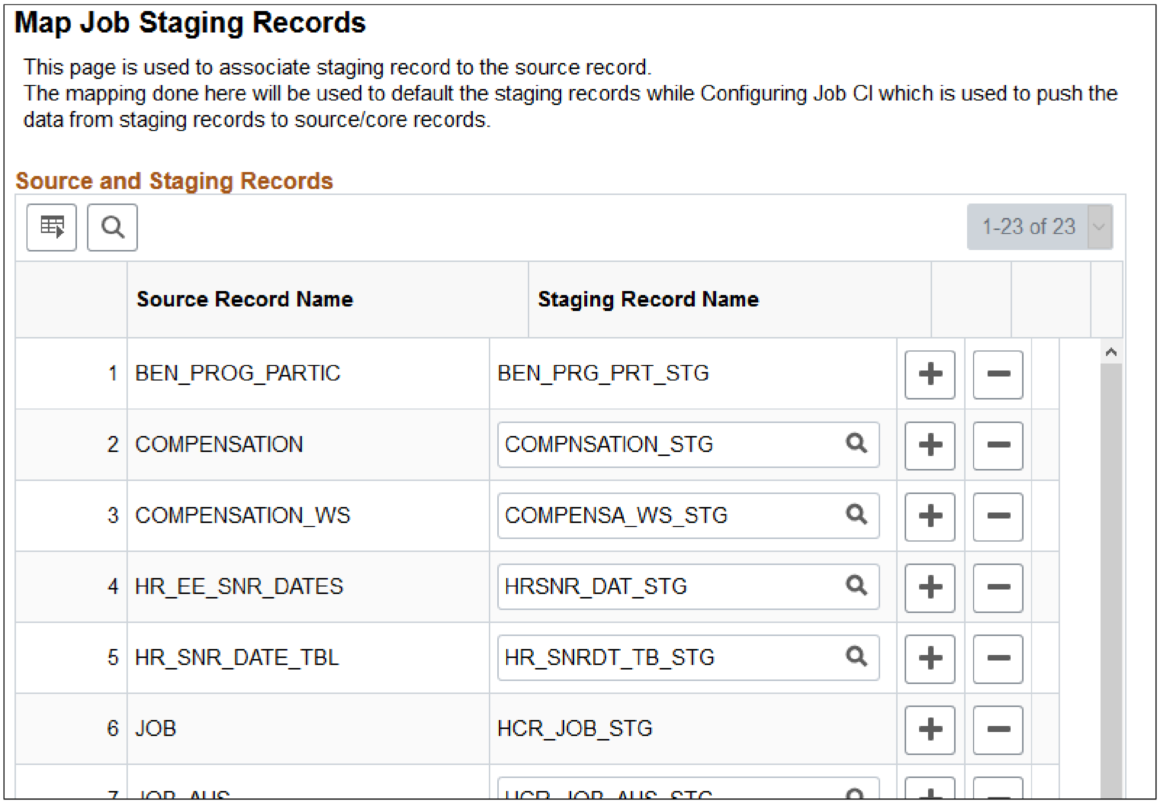
Use the Map Job Staging Records page (HR_JOB_STG_TAG) to associate staging records to source records.

The mapping done on this page will be provided by default to the staging records on the Configure Job CI Page.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Map Job Staging Records**
- Select the Manage Human Resources Tile, select Manage Configurations Tile, and then select **Job Data Install** > **Map Job Staging Records** from the left panel.

This example illustrates the fields and controls on the Map Job Staging Records page.



Important! The following staging records are not editable:
— *HCR_JOB_STG*
— *PER_ORG_INS_STG*
— *PER_ORG_ASG_STG*
— *BEN_PRG_PRT_STG*
You should not replace these delivered staging records, however, you can add or remove fields as needed. With the exception of these four records, you can replace the remaining delivered staging records with your custom staging records.

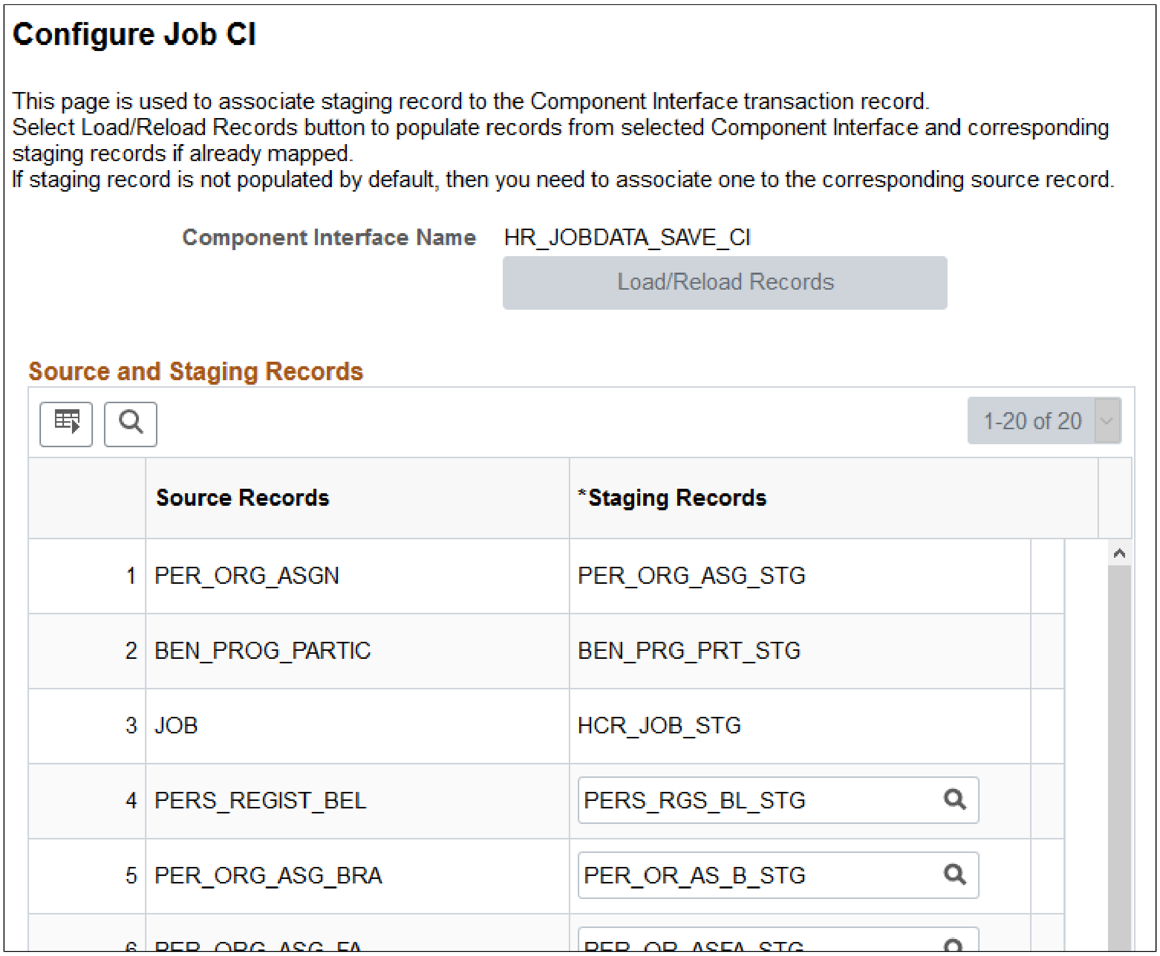
Configure Job CI Page

Use the Configure Job CI page (HR_JOB_STG_CFG) to add the staging record to the component interface record. The system will use this information to push the data from the staging records to the source records.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Configure Job CI**
- Select the Manage Human Resources Tile, select Manage Configurations Tile, and then select **Job Data Install** > **Configure Job CI** from the left panel.

This example illustrates the fields and controls on the Configure Job CI page.



Use this page to define the custom component interface that can be used on the Person and Job Installation - Job Data Page.

Field or Control	*Description*
Load/Reload Records button	Click this button to populate the source and staging records from the component interface and corresponding staging records defined on the Map Job Staging Records Page.
Staging Records	Displays the staging record that is mapped to the source record for this component interface. You can update this information, as needed.

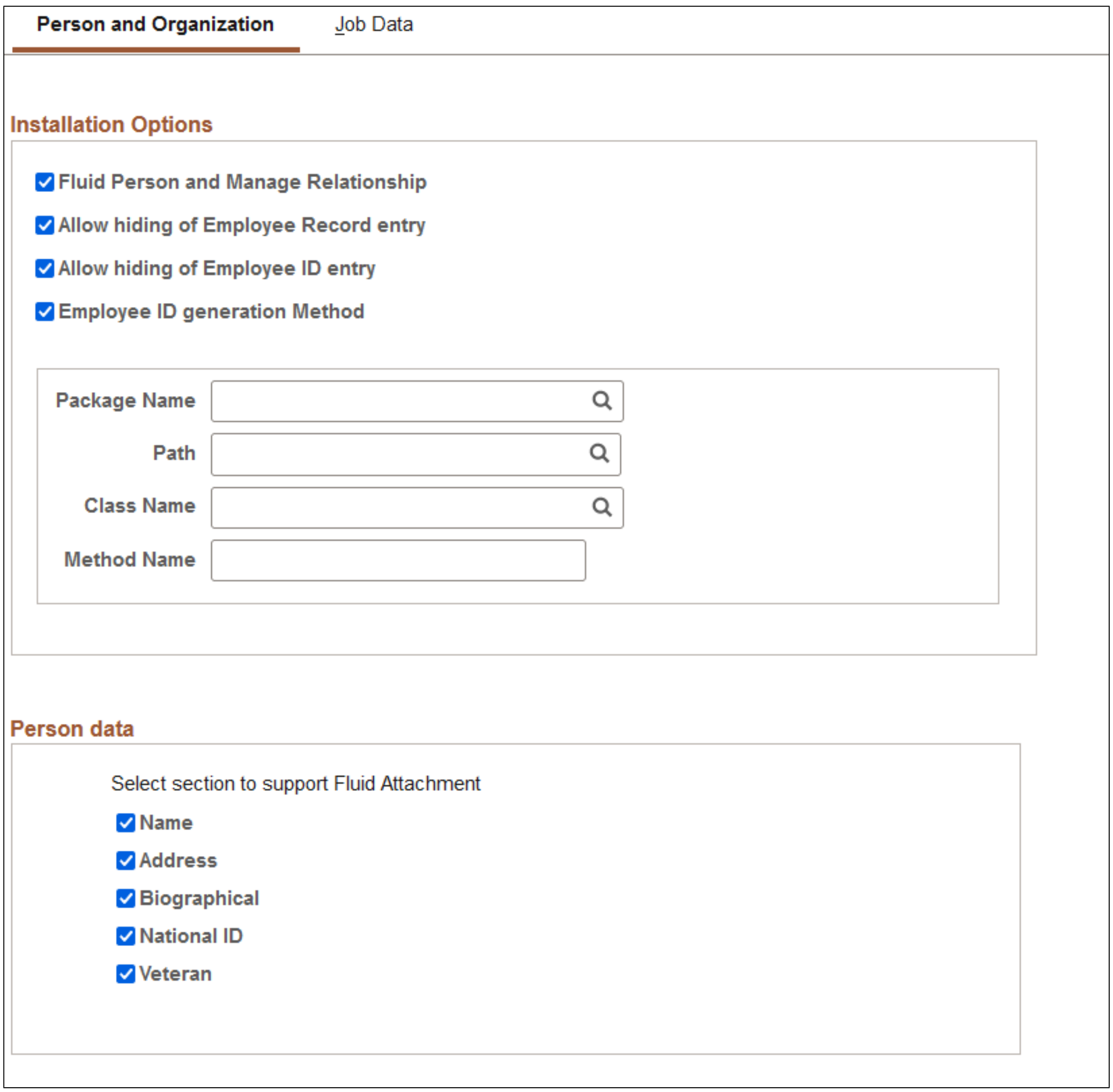
Person and Job Installation - Person and Organization Page

Use the Person and Job Installation - Person and Organization page (HR_INSTALL_PER_REL) to activate fluid person and organization data, manage employee ID and record displays, and enable approvals and attachments for the different sections and organizational relationship types.

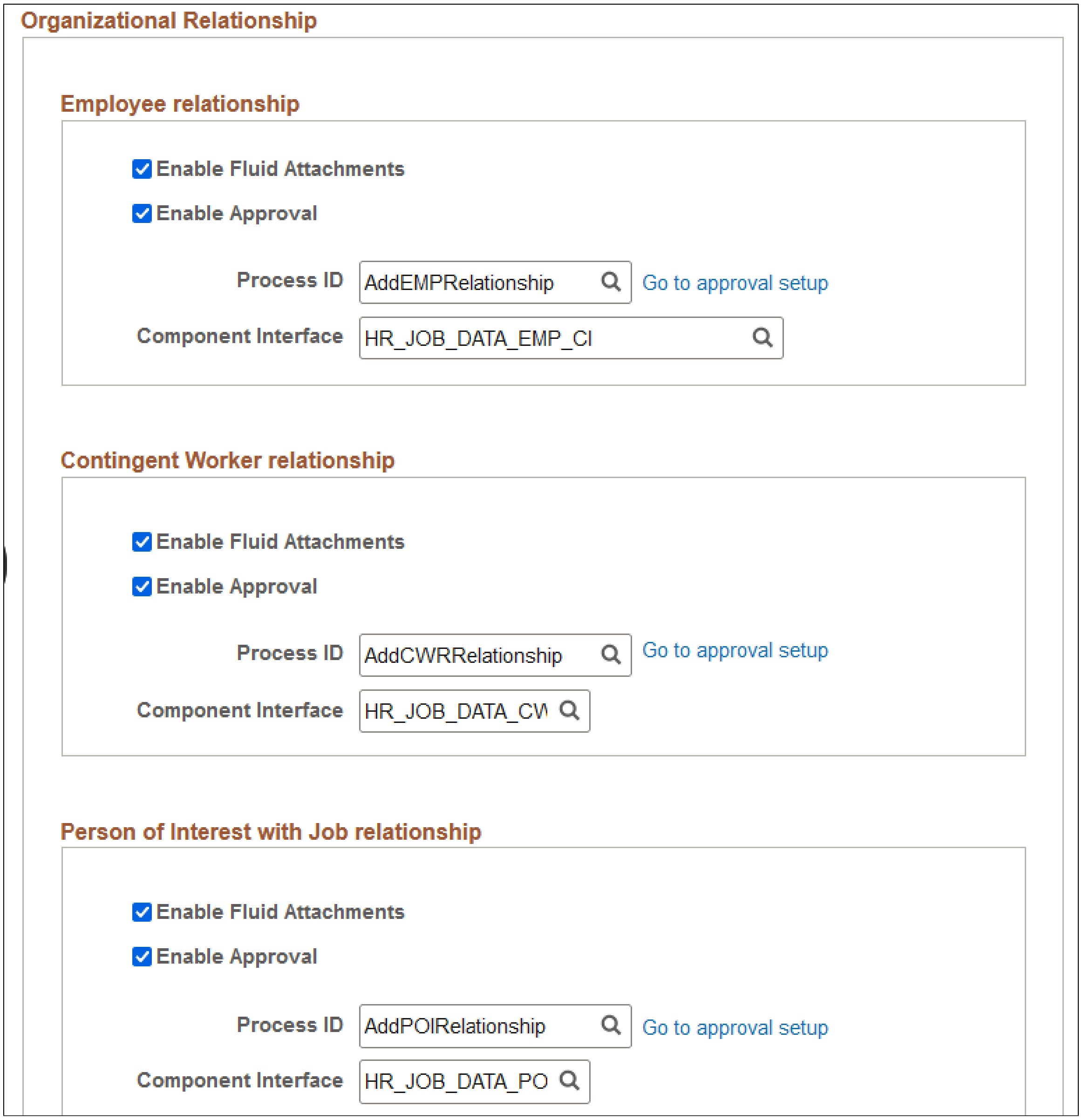
Note: The user must be granted the *Edit Fluid Job Data* (HCCPHR3314) permission list to access this page.
Navigation:

- **Set Up HCM** > **Install** > **Product Specific** > **Person and Job Installation** > **Person and Organization**
- Select the Manage Human Resources Tile, select Manage Configurations Tile, and then select **Person and Job Installation** > **Person and Organization**.

This example illustrates the fields and controls on the Person and Job Installation - Person and Organization page (1 of 2).



This example illustrates the fields and controls on the Person and Job Installation - Person and Organization page (2 of 2).



Installation Options

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Fluid Person and Manage Relationship</td><td>Select this option to enable fluid Person Data and Organizational Relationship functionality. This will allow users to access the following tiles when granted the access role:
• Add Person Tile
• Modify Person Tile
• Create Employee Tile
• Create Contingent Worker Tile
• Create Person of Interest Tile
• (Fluid) Organizational Relationship Tile
• (Fluid) Maintain Person of Interest Tile
See also User Roles for Fluid Person and Job Data.</td></tr>
<tr><td>Allow hiding of Employee Record entry</td><td>Select to hide the Empl Record field on the Request Details Page when creating a new relationship instance.
Deselect this option to display the Request Details pages and allow the user to manually enter the employment record number.</td></tr>
<tr><td>Allow hiding of Employee ID entry</td><td>Select this option to hide the Empl ID field on the Request Details page when adding a new person or creating a new relationship instance. This will prevent the user from manually entering an employee ID. When hidden, the system will use either the Last Employee ID Assigned field from the Installation Table - “Last ID Assigned Page” (Application Fundamentals) to determine the ID, or use the method you identify on this page when you select the Employee ID generation Method.
Deselect this option to display the Request Details pages and allow the user to manually enter the employee ID.</td></tr>
<tr><td>Employee ID generation Method</td><td>Select to display the method fields and enter your own method on how to generate employee IDs. When deselected, the method-related fields will be hidden.</td></tr>
</table>

Field or Control	***Description***
Package Name	Enter the ID of the application package that contains the method to be invoked.
Path	Enter a path that uses a specific class within the root package.
Class Name	Enter the name of the application class that contains the method.
Method Name	Enter the name of the method to be invoked.

Person data

Select to display the **Attachments** section within the corresponding sub-sections on the Person Data Page - Person Details Section. Deselect to hide attachments within these sub-sections.

- **Name**
- **Address** (available on the Add (or Edit) Address Page)
- **Biographical** (available on the Biographical Details Page)
- **National ID** (available on the National ID Page)
- **Veteran** (available on the (USA) Work Status Page)

The following videos provide an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

Organizational Relationship

Use this section to specify attachment and approval options for organizational relationship types by selecting the options here.

- Employee relationship
- Contingent Worker relationship
- Person of Interest with Job relationship

Field or Control	Description
Enable Fluid Attachments	Select to allow the fluid user to upload attachments when adding a relationship (employee, contingent worker, or person of interest with a job relationship). By selecting this option, the corresponding fluid activity guide process will display the Attachments section within the page. Deselect this option to *hide* the Attachments section on the corresponding activity guide process (even if configured to unhide on the Page and Field Configurator). **Important!** Although you enable and disable attachments here, the add person or relationship pages functionality leverages Page and Field Configurator for visibility of steps and page fields. Therefore, you will want to ensure that you set up the Attachments section in Page and Field Configurator in conjunction with this configuration to see the effect in the guided process. The following video provides an overview and demonstration of the Fluid Attachment framework: Video: PeopleSoft Fluid HCM Attachments
Enable Approval	Select this option to require approvals when creating this organizational relationship. **Note:** Approvals need to be enabled to use this functionality.

Field or Control	Description
Process ID	This field is required if you have enabled the approval option for this organizational relationship type. Associate the approval transaction process ID that should be used when creating the relationship. The PeopleSoft application delivers the following process IDs for use with these organization relationships, or you can use your own: • **Employee**: *AddEMPRelationship* • **Continent Worker**: *AddCWRRelationship* • **Person of Interest**: *AddPOIRelationship* **Note:** If you enter your own approval process definition ID, you will also need to update the Approval Process definition (“Defining the Setup Process Definitions Component” (Approval Framework)), the Page Composer setup (“Understanding Page Composer” (Enterprise Components)), and Mobile Approvals options.
Go to approval setup link	Click this link to open a new browser window and access the approval setup “Register Transactions Page” (Approval Framework). You can then view or update the existing registered approval transaction setup for the process ID you entered. When no ID is entered, the system will direct you to the Register Transactions search page where you can review all transaction registries.
Component Interface	Enter the name of the custom component interface you want to use for the fluid Job Data pages based on the organizational relationship you are adding. The system delivers the following organizational relationship interfaces, but you can create your own using the Map Job Staging Records Page and Configure Job CI Page: • **Employee**: *HR_JOB_DATA_EMP_CI* • **Continent Worker**: *HR_JOB_DATA_CWR_CI* • **Person of Interest**: *HR_JOB_DATA_POI_CI*

Person and Job Installation - Job Data Page

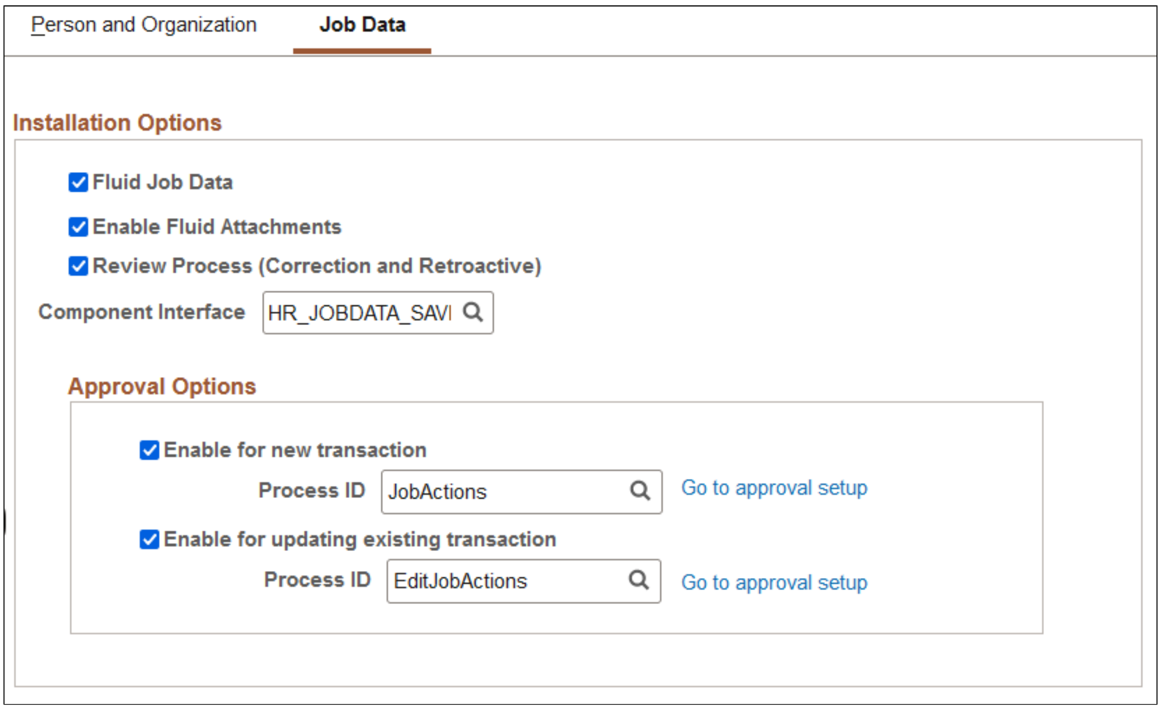
Use the Person and Job Installation - Job Data page (HR_INSTALL_JOB) to activate the Manage Jobs pages in fluid. Define functionality settings for Fluid Job Data to enable access from the Position Management and Guided Self Service (GSS) pages, attachments, approvals, and the review process.

Note: The user must be granted the *Edit Fluid Job Data* (HCCPHR3314) permission list to access this page.

Navigation:

- **Set Up HCM** > **Install** > **Product Specific** > **Person and Job Data Installation** > **Job Data**
- Select the Manage Human Resources Tile, select Manage Configurations Tile, and then select **Person and Job Installation** > **Job Data**.

This example illustrates the fields and controls on the Person and Job Installation -Job Data page.



The check boxes on this page are delivered off by default.

Field or Control	***Description***

Fluid Job Data	Select this option to enable fluid Job Data functionality. This will allow users to access the Manage Job tile and pages when granted the access role.
	
	Selecting this check box also enables the Job Data links on the following business process application pages, directing the user to the fluid Manage Job - Job Actions Summary Page in Correct History mode (note that access to Job Data is defined by the user's security access):
	
	• Position Management:
	    • *Job Data* link on the "Manage/Create Position - Budget Incumbents Page" (PeopleSoft Human Resources Manage Positions).
	    • *Job Data* link in the Budget and Incumbents section of the "View Position Page" (PeopleSoft Human Resources Manage Positions).
	    • *View Job Data* link on the "Manage Primary Incumbents Page" (PeopleSoft Human Resources Manage Positions).
	
	• Guide Self Service (GSS):
	Go To Job link on the classic manager self-service review page and the administrator's final approval page (see "<Transaction Name> Page for Reviewing Submitted Transactions" (PeopleSoft eProfile Manager Desktop) and "<Transaction Name> Page for Final Administrator Approval" (PeopleSoft eProfile Manager Desktop)).
	
	This link appears on the bottom of the page when Guided Self Service Request transactions require the administrator to complete the request.
	
	Note: When users have adding the same transaction from the GSS pages and the fluid Job Data - Job Actions Summary page, the user will need to delete the *In Progress* row from Job Actions Summary page to display the completed GSS row.
	
	Selecting this option will also display the remaining fields on this page.
	
	Deselect to disable fluid Job Data and have Job Data links navigate the user to the classic Job Data pages for an employee (see (Classic) Adding Organizational Instances.) When deselected (disabled), if the user tried to access the Manage Job tile, the system will issue a message stating that the user is not authorized to access the component.

Field or Control	*Description*
Enable Fluid Attachments	Select to allow the user to upload attachments from the (Fluid) Job Data - Attachments Page in fluid. By selecting this option, the following actions occur: • The fluid Job Data activity guide process will display the Attachments step in the Job Data activity guide process and the View Details page. **Note:** The Page & Field Configuration page controls the hiding and unhiding of this page (see "Understanding Page and Field Configurator" (Enterprise Components)). • Enables the Attachments related action menu item on Job Actions Summary page. • Approvers will see the Attachments section on the approval pages. Deselect this option to *hide* the following: • The Attachments step on the Fluid Job Data activity guide process (even if configured to unhide on the Page and Field Configurator) and the View Details page. • Attachments related action menu item on Job Actions Summary page. • Attachments section on the approvals pages for approvers. **Important!** Although you enable and disable attachments here, the Manage Job functionality leverages Page and Field Configurator for visibility of steps and page fields. Therefore, you will want to ensure that you set up the Attachments step in Page and Field Configurator in conjunction with this configuration to see the effect in the guided process.

Field or Control	Description
Review Process (Correction and Retroactive)	Select to enable the review process using the fluid pages. The review process warns the user that the changes made to older rows in a person's job data may affect newer job data rows. The review process will trigger when a user: • Edits an existing transaction row where there are higher effective dated Job Data rows that may need to be reviewed as a result of the correction. • Adds a retroactive row or an effective dated row that is older than the effective date of another job data row. When the review process is enabled, the system will display an indicator next to all potentially affected rows on a popup window and again on the Job Actions Summary Page. This process identifies any rows that are higher than the row being edited (correction) or added (retroactive). These indicators will remain until the review process is complete. To complete the review process, the user must correct each of the affected rows by carrying over the changes to the higher rows, or access each of the potentially impacted rows and click the **Review** button on the last step to indicate that the transaction has been reviewed and does not need any changes (see Job Data - (Fluid) Job Data - Summary Page). Deselect to disable the review process triggers. With this functionality disabled, the system will not display warning messages or indicators to advise the user to review rows that may be affected by the job data correction or retroactive change. **Note:** The Review Process functionality does not work for any other online changes entered by users. For example, if you add a Job Data row from an external business process, like Guided Self Service, Mass Update, or Position Management, the review flags will not appear when there are higher dated rows for the employee. In such cases, the administrator will need to review the Job Data of the employee and make any changes.
Component Interface	Enter the name of the custom component interface you want to use for the Fluid Job Data pages. The system delivers *HR_JOBDATA_SAVE_CI*, but you can create your own using the Map Job Staging Records Page and Configure Job CI Page.

Approval Options

Use this section to configure approval related information for fluid job data. You can define if approval is needed when creating or adding job rows, when correcting existing job rows, or for both.

Note: Approvals need to be enabled to use this functionality.

Field or Control	*Description*
Enable for new transaction and **Process ID**	Select to require approvals when a new job row is added. Then associate the approval transaction process ID that should be used when entering new transactions. The **Process ID** field is required if you have enabled the new transaction approval option. When you enable the approval check box, the process ID will prepopulated with the *JobActions* transaction, but you can override this.
Enable for updating existing transaction and **Process ID**	Select to require approvals when any transaction is corrected, then enter the approval transaction process ID that should be used when editing transactions. The **Process ID** field is required if you have enabled the update existing transaction approval option. When you enable the approval check box, the process ID will prepopulated with the *EditJobActions* transaction, but you can override this.

Note: You can associate the same process ID for the above mentioned Approval options: **Enable for new transaction** and **Enable for updating existing**.
If you enter your own approval process definition ID for creating a new transaction or for updating an existing transaction, you will also need to update the Approval Process definition (“Defining the Setup Process Definitions Component” (Approval Framework)), the Page Composer setup (“Understanding Page Composer” (Enterprise Components)), and Mobile Approvals options.

Field or Control	*Description*
Go to approval setup	Click this link to open a new browser window and access the approval setup “Register Transactions Page” (Approval Framework). You can then view or update the existing registered approval transaction setup for the process ID you entered. When no ID is entered, the system will direct you to the Register Transactions search page where you can review all transaction registries.

On the submission of a job data transaction, the approval chain will appear on the following pages:

- (Fluid) Job Data - Submit Confirmation Page.
- Job Actions Summary Page, under the related actions column.

  Status values on the Job Actions Summary page reflect the statuses as applicable for approvals.
- Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page.

To view examples of how action based approvals can be routed to multiple approvers when using Manage Job, see the corresponding Technical Paper.

Chapter 8

Adding a Person in PeopleSoft Human Resources

(Classic) Adding a Person

To create a person record, use the Add a Person component (PERSONAL_DATA_ADD). Use the (CI_PERSONAL_DATA) component interface to load the data into the table for this component.

These topics provide an overview of identification assignment, list common elements, and discuss how to add a person.

Note: You should create and save either a Job Data or a Person of Interest (POI) Relationship record for a new person at the time you create the new person.

Pages Used to Add a Person

Page Name	***Definition Name***	***Usage***
Biographical Details Page	PERSONAL_DATA1	Enter name and other biographical information.
Add Name Page View Name Page Edit Name Page	NAME_EDIT_GRP_SEC	Add, edit, and refresh name information.
<Gender Field Label> Values Page	HR_GENDER_DTL_SEC	View gender field value descriptions.
Add a Person or Modify a Person - Contact Information Page	PERSONAL_DATA2	Enter or edit a person's contact information.
Address History Page	ADDR_HISTORY_SEC	Enter the effective date, country, and status for the address and refresh the address data when you make changes.
Edit Address Page	EO_ADDR_SEC	Edit address information.
Add a Person or Modify a Person - Regional Page	PERSONAL_DATA3	Enter country-specific personal information.

Page Name	Definition Name	Usage
Self Identification Data Canada Page	CAN_SELF_ID_DATA	Enter Canadian ethnicity data for a person, including whether the person is a visible minority and whether the person is an aboriginal person. Be sure this page is appropriately secured to protect the confidentiality of this data.
Veteran Status Page	HR_VETERAN_STATUS	Employees use this self-service page to enter and update self-identification veteran information. When the employee submits the Veteran Status page, the system displays the veteran self-identify data in the Veteran group box on the Regional page in the Personal Information – Add a Person or Modify a Person component. Administrators can update the selection on the Regional page.
Update Personal Data-Future Page	PRCSRUNCNTL	Run this process shortly after midnight to update the Personal Data component. The process will update data with new, effective information that is not currently in the component. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

Note: The Person Search (HC_HR_PERSON) search index supports real time indexing (RTI) with PeopleTools version 8.59.07 or higher. When enabled, RTI allows real-time updates to the indexed data to provide current person search using the latest information.
For more information about Real Time Indexing, refer to *PeopleTools: Search Technology,* “Administering Real-Time Indexing."

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

Understanding Identification Assignment

When you open the Add a Person component, the system requests a person ID. There are two ways to assign IDs:

- Automatically

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

The system maintains the last assigned ID on the Installation Table - Last ID Assigned page.

See “Last ID Assigned Page” (Application Fundamentals).

- Manually

  You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

  Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

Note: To avoid maintaining two different sets of IDs, it is recommended that you use only one method to assign them: either always assign them manually or always let the system assign them.

Common Elements Used When Maintaining Personal Data

Field or Control	*Description*
Smoker and **As of**	Indicate if the person is a smoker and enter the date on which the person started smoking. A person's smoker status affects benefits eligibility and rate determination in PeopleSoft Human Resources (HR) Manage Base Benefits and is required for regulatory reporting.
Ethnic Group	Select an ethnic group. You set up ethnic groups on the Ethnic Groups page. (AUS) Affirmative action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page. (USA) Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports. (GBR) Values are based on U.K. equal opportunity ethnic categories.
Military Status	Enter the person's military status. **Note:** Employees can enter and update their own military status in self service, on the Veteran Status Page. Administrators can override and update the selection in the Add a Person or Modify a Person components, and the changes will be reflected in self service.
Preferred	Select the person's preferred email address or phone number.

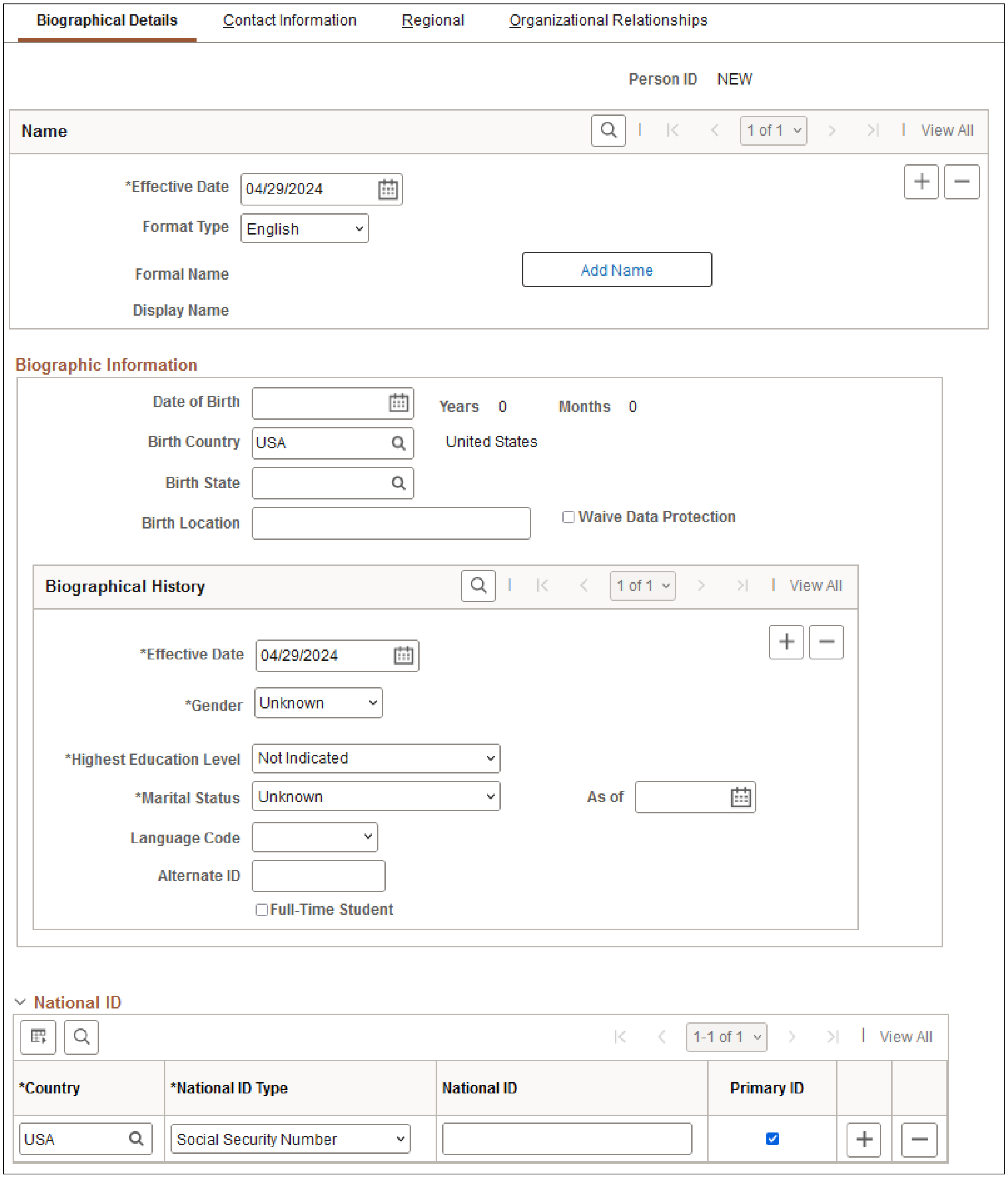
Biographical Details Page

Use the Biographical Details page (PERSONAL_DATA1) to enter name and other biographical information.

Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Add a New Person** > **Biographical Details**
- **Workforce Administration** > **Personal Information** > **Add a Person** > **Biographical Details**
- **Workforce Administration** > **Personal Information** > **Modify a Person** > **Biographical Details**

This example illustrates the fields and controls on the Biographical Details page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Person ID	If you are adding a new person and are using system-assigned IDs, the field displays the value *NEW* until you save this record. Otherwise, the system displays the value that you enter to access the page.

Name

Field or Control	*Description*
Format Type	Select the name format. This value controls the name field and layout configuration on the Add Name Page. **Note:** The name fields and the layout of the Name section is determined by the Name Format Type configuration (see "Setting Up Additional Name Information" (Application Fundamentals)). Therefore, if you change the name format type, the fields listed on the Name page may change.
Formal Name	Displays the person's legal name to be used for official purposes.
Display Name (also known as Preferred Name)	Displays the person's preferred or chosen name. This name will appear on most transaction pages, headers, and reports.
Add Name button **View Name** and **Edit Name** buttons (when working with an existing person record)	Select to access the Add Name Page and add, view, or edit a name.

Biographic Information

Field or Control	*Description*
Date of Birth	Enter the person's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.
Birth Country	Select a country. Based on the selected country, the system might display additional fields.
Birth Location	Enter a birth location, usually a city, town, or village. (BRA) If the selected birth country is *BRA* (Brazil), this field becomes a prompt field for cities.

Field or Control	*Description*
Date of Death	This field does not appear during the hiring process. Use this field when updating a person's records.
Waive Data Protection	European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if you obtain the employee's consent to share personal data with users in other European Union member nations.

Biographical History

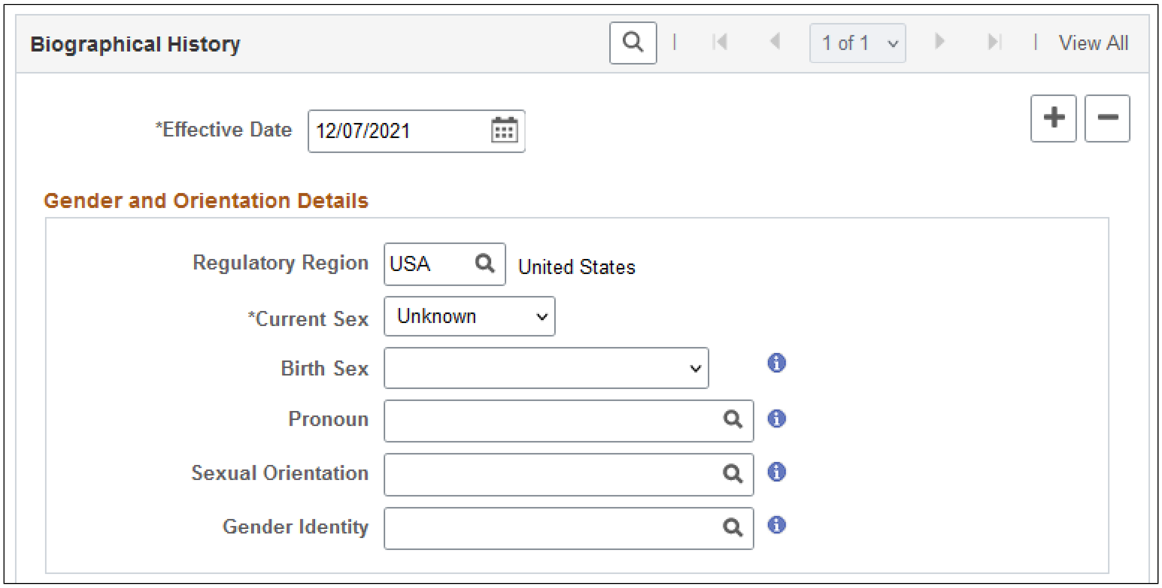
Field or Control	*Description*
Gender	Select the person’s gender. By default, the value is set to *Unknown*. **Note:** (BRA) You must specify the person’s gender (*Male* or *Female*) for eSocial reporting to work properly. If the **Enable Gender Identity** feature is enabled on the Installation Table, this section will appear differently. See the **Gender and Orientation Details** section that follows for the additional field definitions.
Highest Education Level	Select a value. **Note:** (JPN) For Japanese education-level age-related pay calculations, a form of seniority pay, these values are linked to an education-level age basis as of hire.

Field or Control	***Description***
Marital Status and **As of**	Select the person's marital status. Values are: *Common Law, Divorced, Head of Household, Married, PACS* [(FRA) this field is used in France. Pacte civil de solidarité], *Separated, Single, Unknown,* and *Widowed.* When a marital status is changed, the default as of date is the same as the biographical history effective date. PeopleSoft Payroll doesn't use the marital status that is entered on this page for tax calculations. For U.S. employees, you enter that information in Maintain Payroll Data on the Federal, State, and Local Tax pages. Taxes for Canadian employees are based on net claim amount, which varies depending on the employee status. **Note:** Laws in the Netherlands require tracking effective-dated marital status information for employees.
Language Code	Select the person's native or preferred language. Although tracking official or preferred languages is required in some countries in PeopleSoft Human Resources, the system also uses the preferred language when you communicate with people with a relationship to the organization. For example, PeopleSoft Global Payroll for Germany and Switzerland use the language code to print paychecks in the payee's preferred language. Other types of communication also use this as the default language for written communication. **Note:** Don't use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages. Use the Location Table to track the organization's official language. Use the Languages table to record a worker's language proficiency. The Language Code field prompts from the LANG_CD table, which concerns the person's native or preferred language, and not from the LANGUAGE_CD table, which contains the languages into which the application can be translated.
Alternate ID	To use a second type of ID for a person, enter the ID.
Full-Time Student	Select if the person is a full-time student.

Biographical History: Gender and Orientation Details group box

This group box appears within the structure of the **Biographical History** section when **Enable Gender Identity** is selected on the Installation Table - “HCM Options Page” (Application Fundamentals). This allows administrators and employees to track gender identity details in Personal Data. This functionality is delivered turned off.

This example illustrates the fields and controls on the Biographical Details page: Gender and Orientation Details group box.



These videos provide an overview of the gender identity functionality:

Video: Image Highlights, PeoleSoft HCM Update Image 41: Gender Identity and Expression

Video: PeopleSoft Gender Identity and Expression

When you or a manager approves a gender identity update from an employee, the system will insert a new **Biographical History** effective dated row. However, if you do not allow the employee to update and submit gender details, you need to insert a new **Biographical History** effective dated row to retain historical information. See also "Pending Approvals - Gender Identity Change Page" (PeopleSoft eProfile Manager Desktop).

Gender details are specific to an individual and a person can choose to identify all gender details or just a few. The **Gender**, or **Current Sex**, field (the label may vary depending on the configuration of this field label on the "Gender Configuration Page" (Application Fundamentals)) is the only required field. Employees can update their own details on the fluid self service Personal Details - "Gender Details Page" (PeopleSoft eProfile) when they have been assigned the *Fluid Dashboard - Person Dtls* role and granted access to update the fields. Employees must also be part of a regulatory region that is configured for gender identity (see configuration on the "Gender Details Page" (Application Fundamentals)).

Note: Unless otherwise noted, the values for these fields are defined on the setup "Gender Details Page" (Application Fundamentals).

Field or Control	***Description***
Regulatory Region	Enter a region that is configured for gender identification. After you exit this field, the additional gender fields will appear in the group box. The valid values for the remaining fields are based on the regulatory region you enter here. **Important!** The regulatory region for gender details should align with the regulatory region assigned to a person's primary job on the Work Location Page. The employee self service “Gender Identity Page” (PeopleSoft eProfile) and “Gender Details Page” (PeopleSoft eProfile) use the regulatory region from Job Data to manage gender details. If this region varies from that in Job Data, the Gender Identity page will display the current information from this section. However, the employee will not be able to edit information that is tied to a regulatory region different from that stored in Job Data. Instead, the page will display an + (Add) button for the employee to enter gender details using the regulatory region associated with the employee's primary job.
Gender or **Current Sex** (label name may vary)	This is the only required field in the **Gender and Orientation Details** group box. Select the person’s current sex. By default, the value is set to *Unknown*. Valid values come from the translate table and are not tied to region. **Note:** This field label comes delivered as **Gender** but is configurable on the “Gender Configuration Page” (Application Fundamentals). **Current Sex** is the new label delivered by default, but this value can also be overwritten.
<gender field label> List Information icon	Click this icon to access the <Gender Field Label> Values Page and view descriptions of values for gender-related fields. This displays the values entered by region on the configuration “Gender Details Page” (Application Fundamentals).
Birth Sex	Enter the sex assigned at birth.

Field or Control	Description
Pronoun	Select the pronouns this person prefers to be called. **Note:** When you enter this information, and the system is configured to show pronouns, the pronouns will display next to the employee's name on the Company Directory - Profile pages in fluid (see Using the PeopleSoft Fluid User Interface for the Company Directory). To configure the Company Directory to display pronouns in fluid, see the Chart and Profile Settings - Profile Content Page.
Sexual Orientation	Enter this individuals inherent attraction to a sexual partner of a certain gender.
Gender Identity	Enter the person's inner sense or self perception of being male, female, a blend of both or neither. One's gender identity can be the same or different from their sex assigned at birth or current sex.

Considerations when Entering Gender and Orientation Details

Since gender information is driven by region and an administrator's security access, there are situations that will impact what gender fields you can access.

Assuming all setup has been done to support recording gender details, consider the following scenarios in regards to the regulatory region assigned to the employee on the Job Data - Work Location Page and your security access:

- You have row level and global security access to a region configured for gender identification (for example, *USA*). You can:
  - Search for employees in the *USA* regulatory region.
  - See and select *USA* as a regulatory region within Biographical History: Gender and Orientation Details section of Personal Data.
  - See the gender identity fields for the *USA* region.
  - See the modified **Gender** label as **Current Sex**, if applicable.
- You have row level and global security access to a region configured for gender identification and one not configured for gender identification (for example, *USA* and *MYS* respectively). You can:
  - Search for employees in the *USA* and *MYS* regions.
  - See the gender identity fields for *USA* employees and see the modified **Gender** label as **Current Sex**, if applicable.

- NOT see the gender identity fields for *MYS* employees, or see the modified **Gender** label as **Current Sex**, if configured as such.

- You have row level security for *USA* (which is configured for gender identification) and *MYS* (which is not configured for gender identification), but you have global security for *MYS* only. You can:
  - Search for employees in the *USA* and *MYS* regions.
  - NOT see the gender identity fields for *USA* employees in person data, or see the modified **Gender** label as **Current Sex**, due to global security.
  - NOT see the gender identity fields for *MYS* employees in personal data, or see the modified **Gender** label as **Current Sex**, due to *MYS* not being a gender configured region.

National ID

Field or Control	***Description***
Country	Select the country that issued the worker's national ID.
National ID Type	The system enters the value that you establish for this country on the National ID Type Table page. You can override this default. **Note:** (BRA) Add rows to enter one or more of the following IDs for the person: *CAIXA, CPF - Person Registry, CTPS - Work Card, Civil Registry ID, Class Entity Registration, Foreigner ID, General Registry, Health National Card, Militar Certificate, NIT Number, New Born ID, PASEP, PIS,* and *Voter Registration Card.* **Note:** (BRA) Changes made to a Brazilian person's *CTPS - Work Card* and *PIS* national ID types will be recorded on the National ID History page.

Field or Control	*Description*
National ID	Enter the worker's national ID number. The system checks the format of the entry against the default format that you enter on the National ID Type Table page. (GBR) For the U.K. the normal format of two letters followed by six digits and then one letter for National Insurance identification appears by default. Other options that are dependent on employee status are available. (GBR) When you enter a national insurance number, the system uses the NID Prefix GBR page to check that you have entered a valid national insurance prefix. You can't save this page if you have entered an invalid national insurance prefix.
Primary ID	Select if the national ID is the person's primary ID. If this is the only data row for this person, the system selects the check box by default. You can deselect it.
Tax Ref	(SGP) Select if the worker's national registration ID is used as the person's employer tax reference number. This field is for information only.
National ID Expiry Date	(CAN) Enter the expiration date for this National ID.

(CAN) Verifying Social Insurance Numbers for Canadian Employees

Invoke a modulus 10-check digit formula to verify an employee's social insurance number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

If you enter an employee SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

(NLD) Verifying Social Security IDs for Dutch Employees

The Dutch national ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates the entry for the employee's social security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

(USA) Reporting to Government Agencies When the Social Security Number Is Unknown

When the social security number (SSN) is missing, the system enters the default number that is defined on the National ID Type table, usually all 9s. However, reports and files that are created by PeopleSoft Payroll for North America for submission to government agencies, such as the IRS or Social Security Administration, convert missing or unknown SSNs to the specific format that is required by the government agency. For example, a missing or unknown SSN is reported to the IRS using all zeros on the W-2 file.

Related Links

"Tracking Employee Medical Exam Results" (PeopleSoft Human Resources Monitor Health and Safety)
Understanding Additional Worker Data

Add Name Page

Use the Add Name page (NAME_EDIT_GRP_SEC) to add, edit, and update name information.

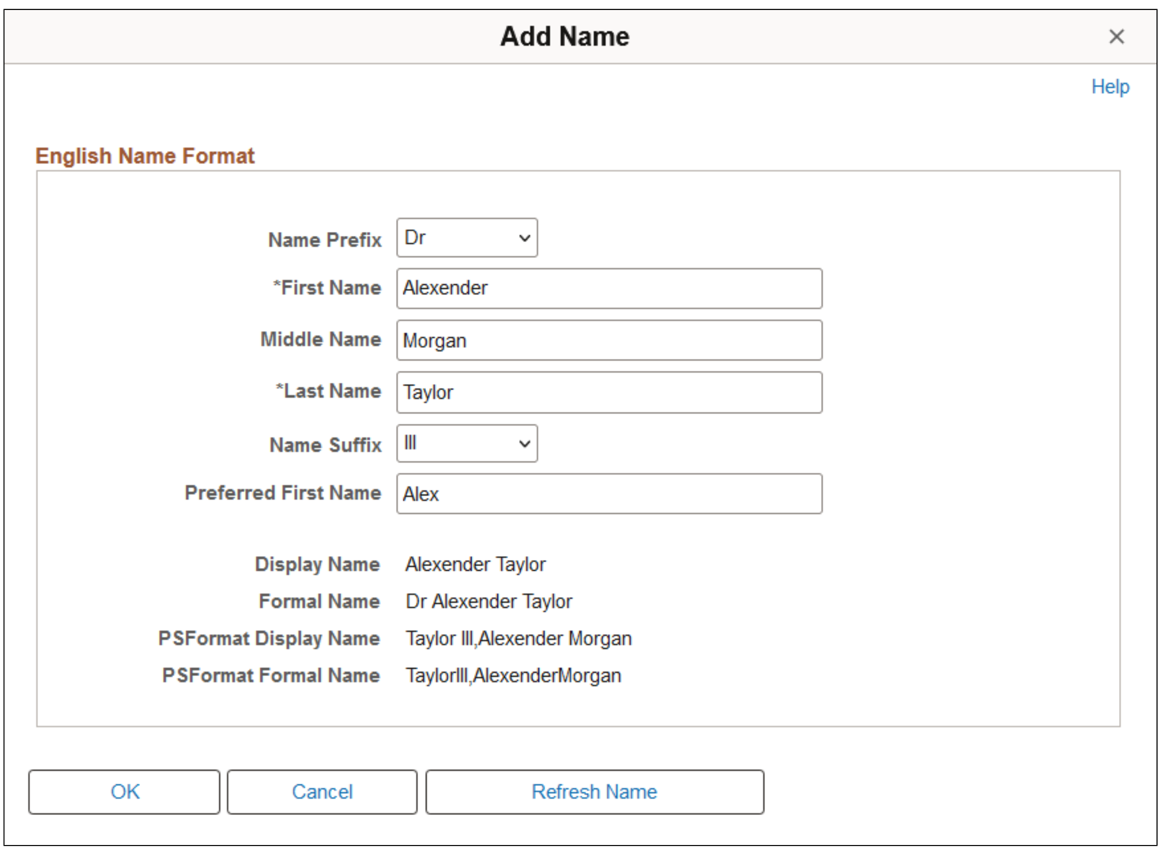
Note: When viewing or updating an existing personal data record, the page name will appear as **View Name** or **Edit Name**.

Navigation:

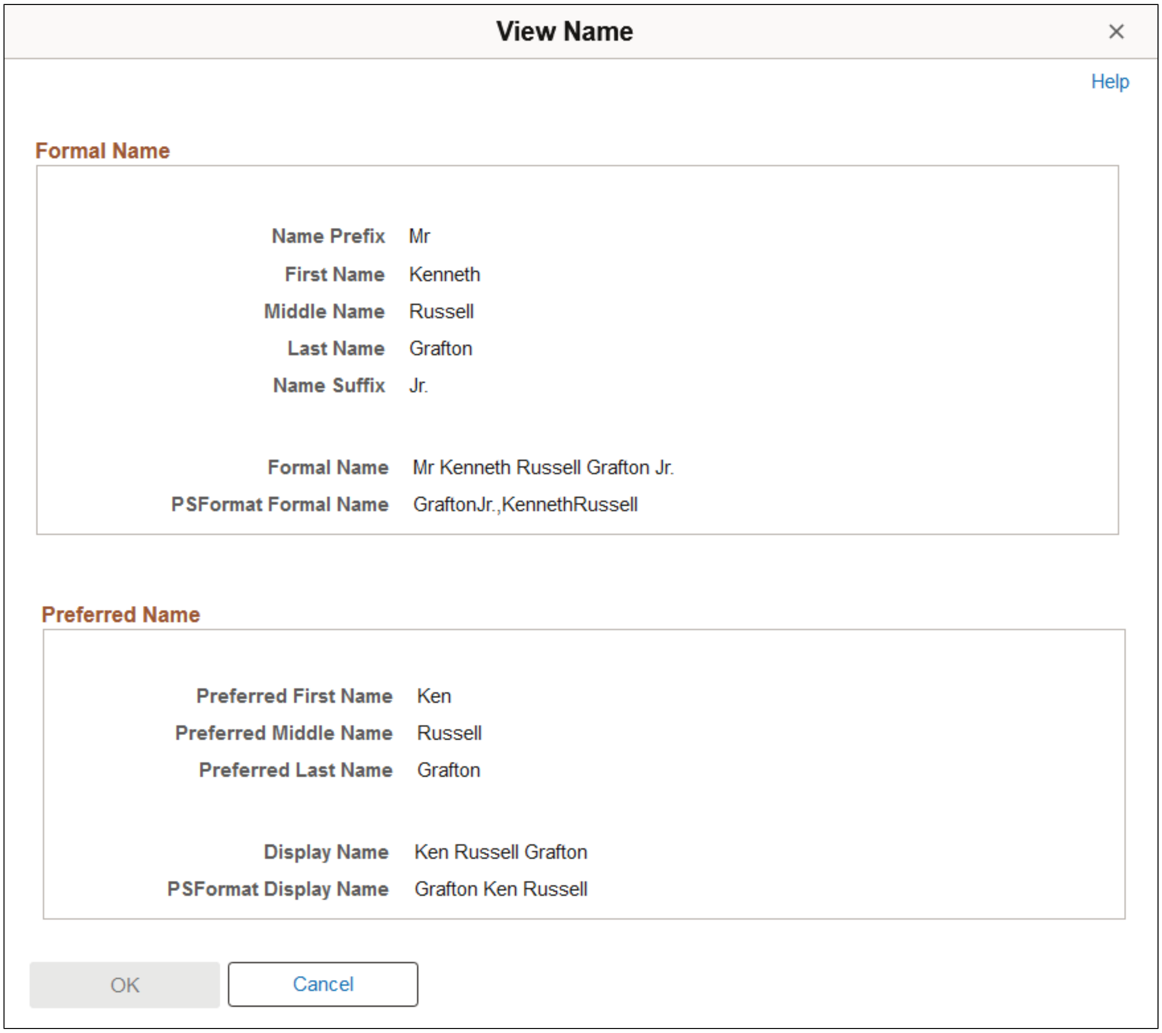
Select the **Add Name** button on the Biographical Details Page.

Note: For existing personal data records, select the **View Name** or **Edit Name** button.

This example illustrates the fields and controls on the Add Name page.



This example illustrates the fields and controls on the View Name page when Use Formal and Display Name Groups is enabled on the name format type configuration.



Note: The page layout and fields will vary based on the **Format Type** field value selected on the Biographical Details Page, such as *English*, *Spanish*, and so forth. The name fields and the layout is determined by the Name Format Types configuration. Therefore, if you change the name format type, the fields listed may change.

As delivered, the page displays the person's formal name (the legal name that will be used for official purposes) and the display name (the person's preferred or chosen name and the name that will appear on many of the transaction pages throughout the system).

When **Use Formal and Display Name Groups functionality** is enabled, the Name pages will divide the formal and display name fields into two sections.

For more information on page field configuration and Formal and Display Name Groups, see the documentation for “Setting Up Additional Name Information” (Application Fundamentals), Name Format Types component.

<Gender Field Label> Values Page

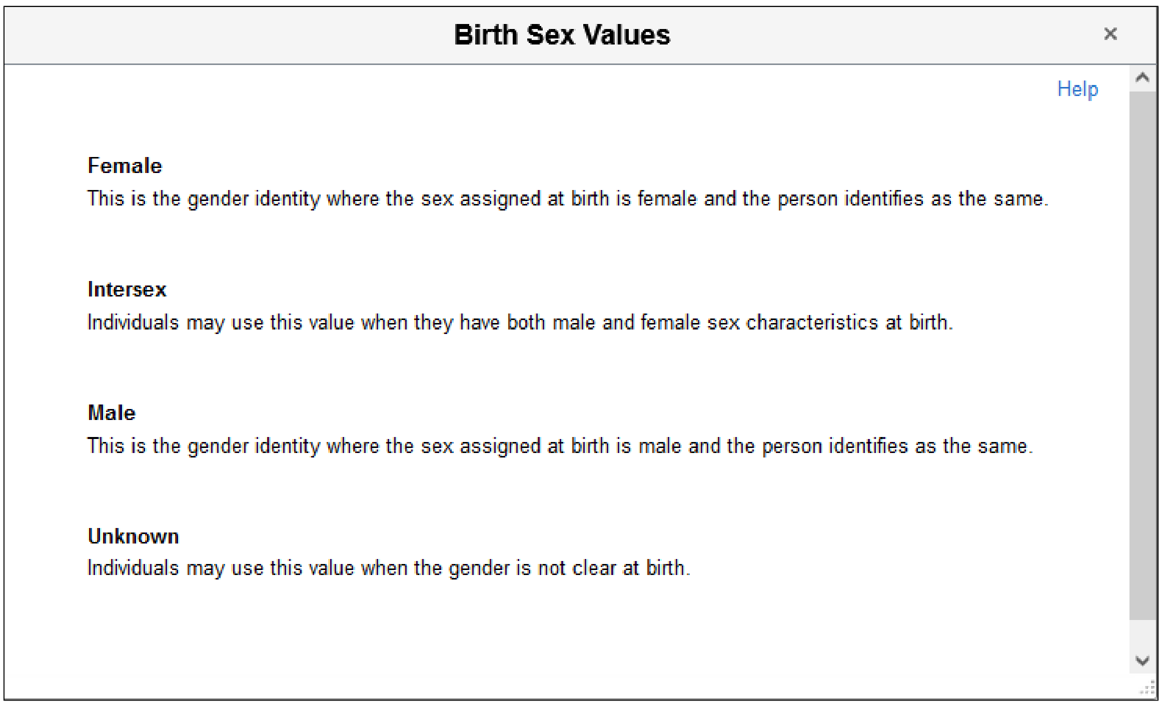
Use the <Gender Field Label> Values page (HR_GENDER_DTL_SEC) to view gender field value descriptions.

Note: The page title and information correlates to the gender field label.

Navigation:

Select the List Information icon for a gender field.

This example illustrates the fields and controls on the <Gender Field Label> Values page.



Page content will vary by gender field type and the configuration of the “Gender Details Page” (Application Fundamentals) for the region.

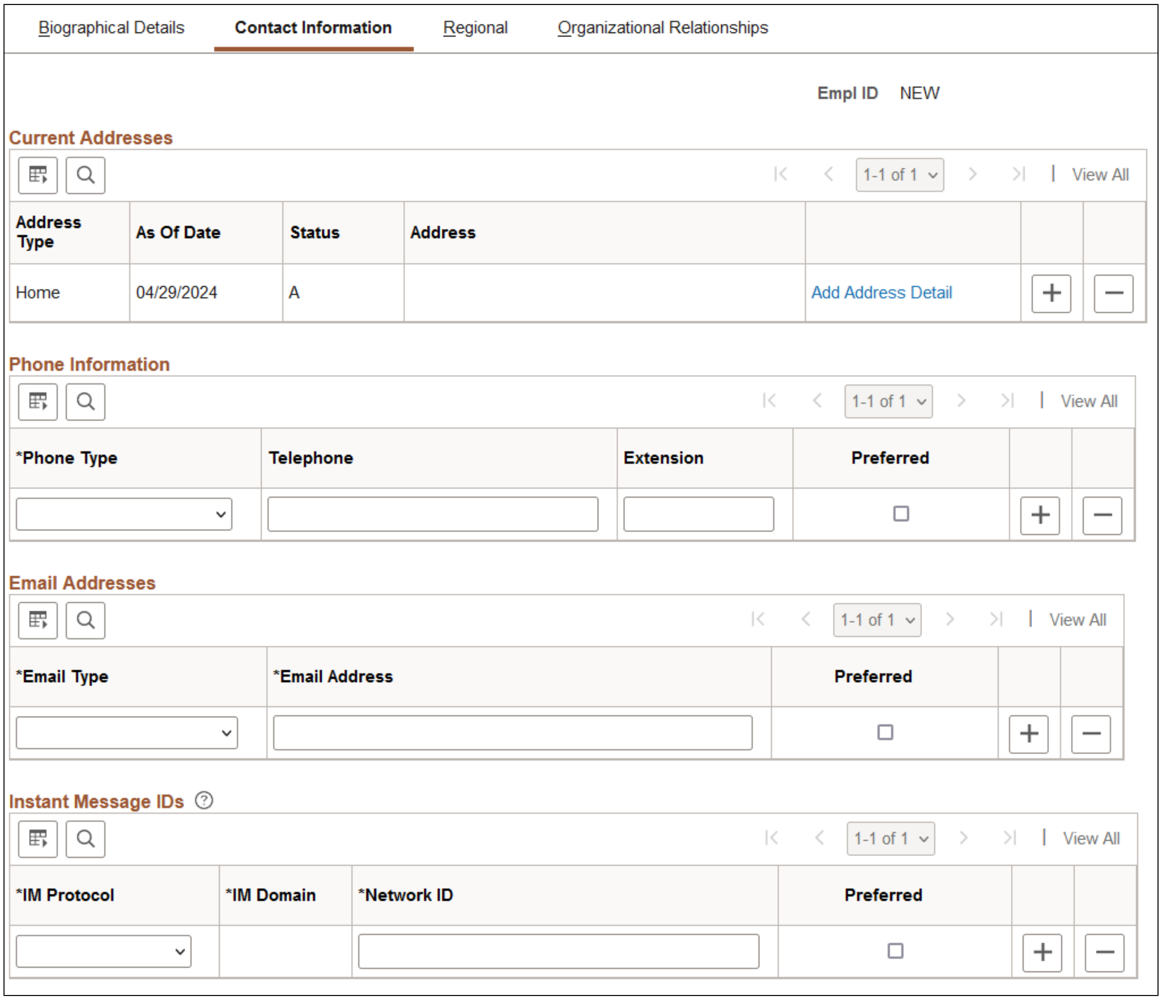
Add a Person or Modify a Person - Contact Information Page

Use the Contact Information page (PERSONAL_DATA2) to enter or edit a person's contact information.

Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Add a New Person** > **Contact Information**
- **Workforce Administration** > **Personal Information** > **Add a Person** > **Contact Information**
- **Workforce Administration** > **Personal Information** > **Modify a Person** > **Contact Information**

This example illustrates the fields and controls on the Contact Information page. You can find definitions for the fields and controls later on this page.



Current Address

Field or Control	*Description*
Address Type	Select the type of address that appears in this row. The system automatically displays *Home* for the first address that you enter. **Note:** Payroll for North America requires the person to have one address with type *Home* to successfully calculate taxes. You must set up each Puerto Rico employee's home address with country code *USA* and state code *PR* for proper tax reporting.

Field or Control	***Description***
Add Address	Click to add an address and access the Edit Address page to edit addresses. **Note:** (ITA) When entering Italian addresses, use the **Address Search** link on the Edit Address page to locate valid cities based on province.

Note: Laws in Belgium, the Netherlands, and Japan require maintaining effective-dated address information for employees.

Phone Information

Field or Control	***Description***
Phone Type and **Telephone**	Select the phone type and enter the phone number. The system formats the number based on the standard phone number format. For 10 digit phone numbers the format is *000/000-0000* and for 7 digit phone numbers the format is *000-0000.* The system also supports alphanumeric characters and the punctuations *$, -, /, (,* and *)* when entering telephone numbers. Select *Main* to designate a phone number as the individual's primary contact number.

Email Addresses

Field or Control	***Description***
Email Type and **Email Address**	Select an email type and enter the employee's email address. **Note:** If an employee has more than one address, click the **Add (+)** button after selecting the address type.

Instant Message IDs

Use this group box to enter instant message IDs that appear on application pages when chat is enabled.

Field or Control	***Description***
Network ID	Enter the employee's ID for the supported instant chat network. **Note:** Google and MSN require special network IDs. The Google chatback badge and MSN user ID will need to be provided by the employee to provide permission for public presence to appear in the system. Please see MSN and Google for more information on network IDs.
IM Protocol and **IM Domain**	Enter the supported IM protocol for the network ID. Valid values are *GTALK, MSN, XMPP,* and *YAHOO.* The system displays the instant message domain associated with the IM protocol you select except for *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization. See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"
Preferred	Select if this is the user's preferred chat network ID.

Note: Some public networks such as *GTALK* and *MSN* require special network IDs which can only be obtained through their respective websites.

Related Links

"Administering Country Codes" (Application Fundamentals)

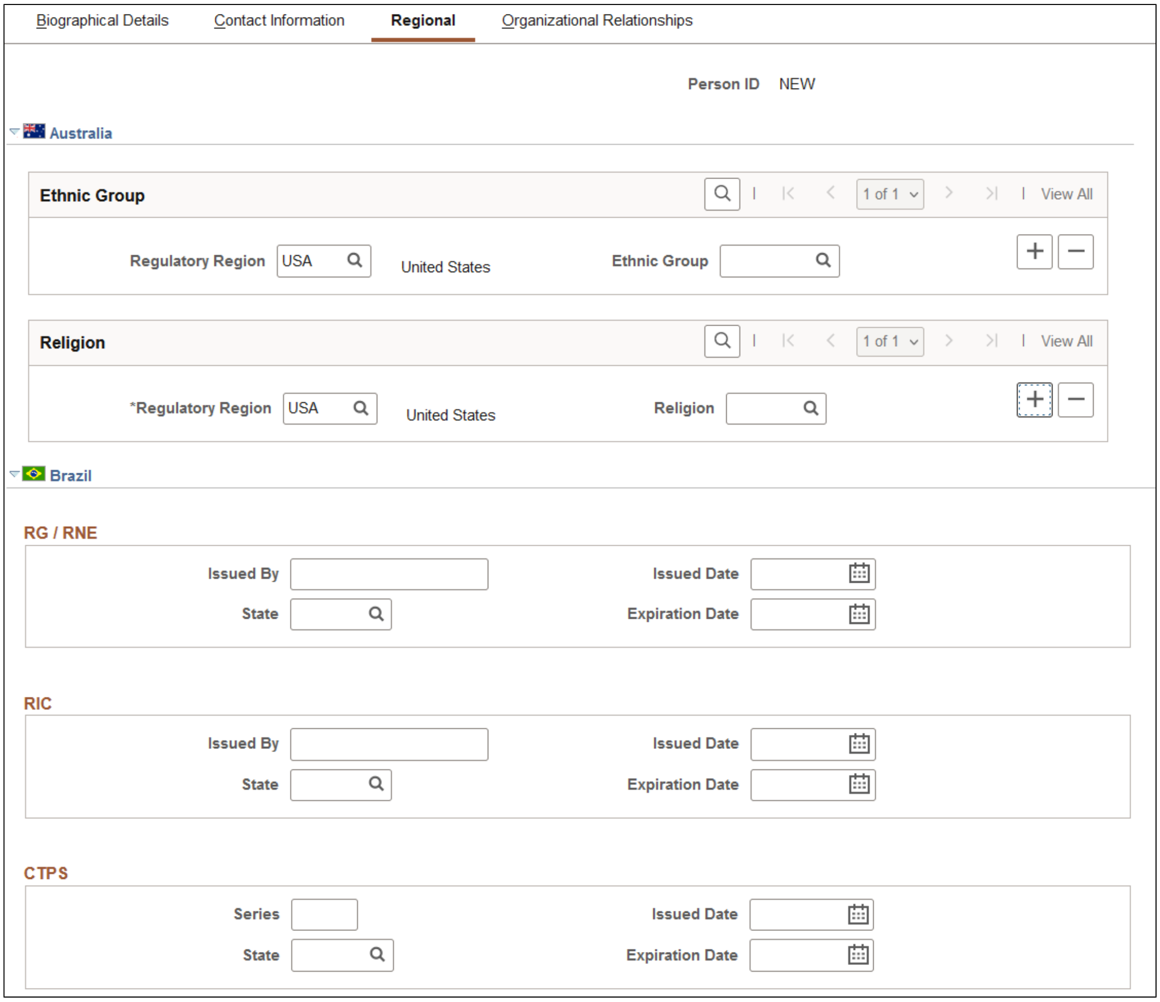
Add a Person or Modify a Person - Regional Page

Use the Regional page (PERSONAL_DATA3) to enter country-specific personal information.

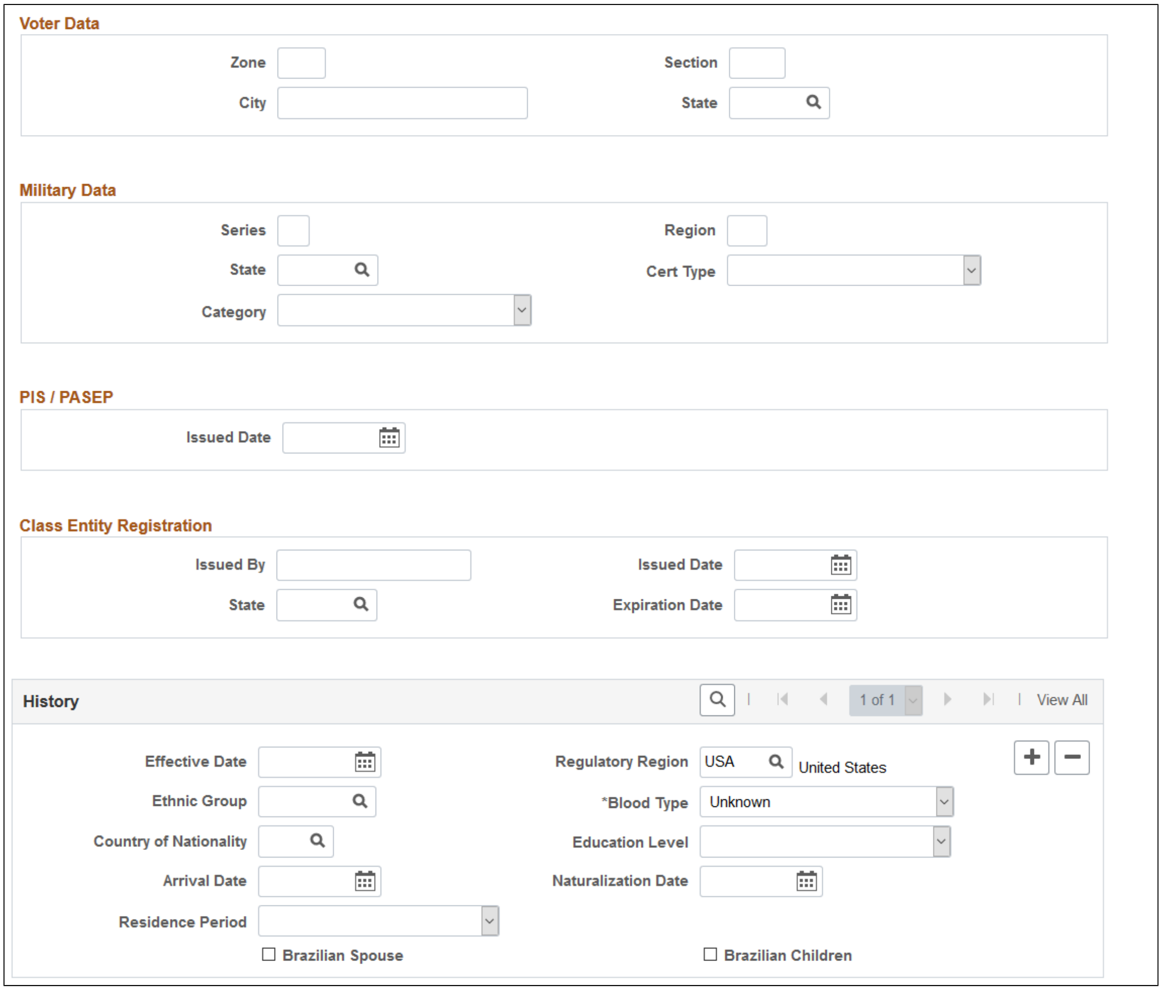
Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Add a New Person** > **Regional**
- **Workforce Administration** > **Personal Information** > **Add a Person** > **Regional**
- **Workforce Administration** > **Personal Information** > **Modify a Person** > **Regional**

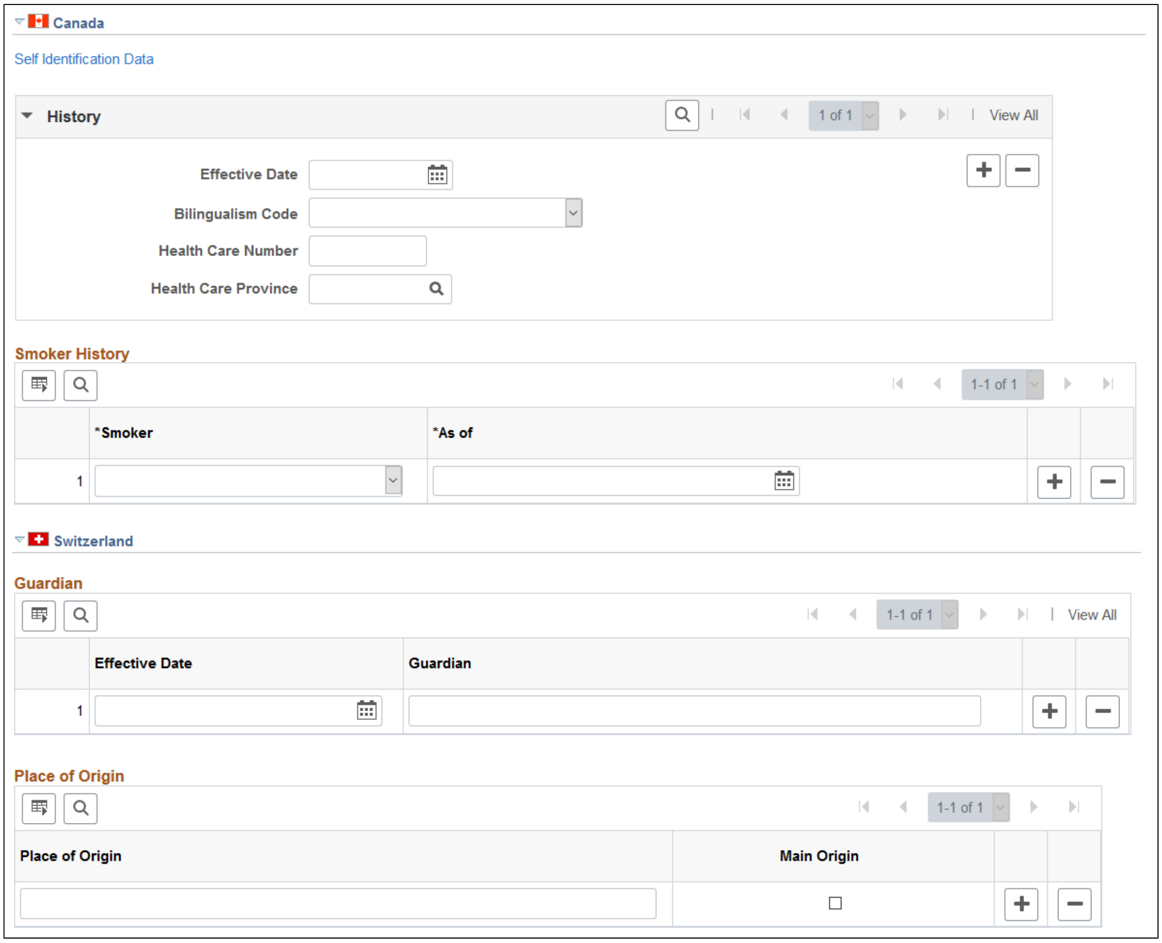
This example illustrates the fields and controls on the Regional page (1 of 12). You can find definitions for the fields and controls later on this page.



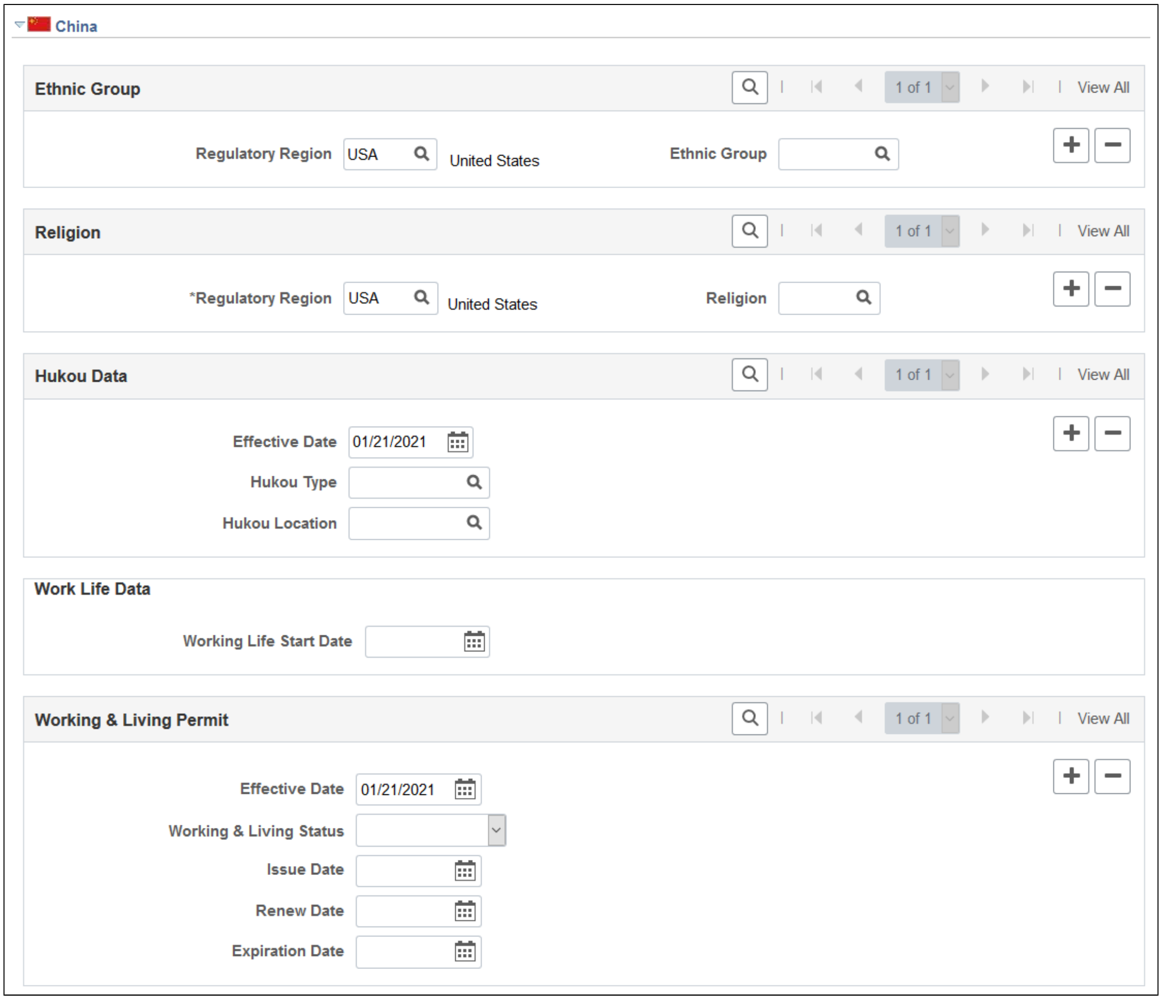
This example illustrates the fields and controls on the Regional page (2 of 12). You can find definitions for the fields and controls later on this page.



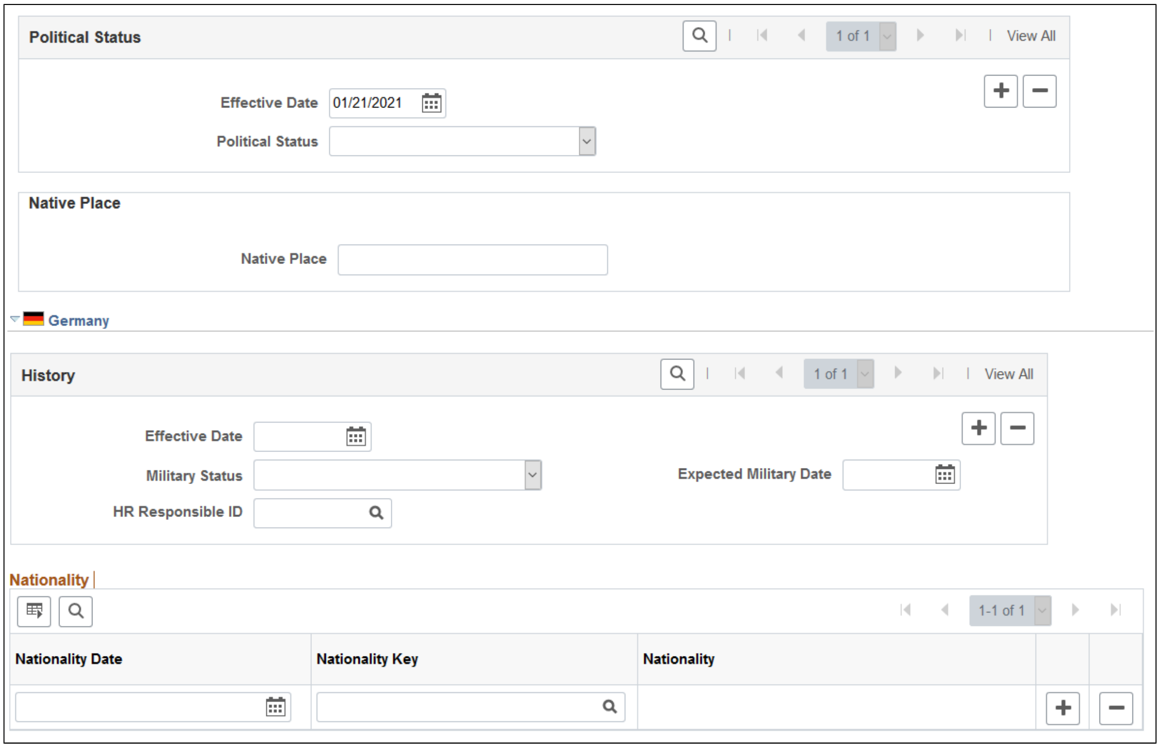
This example illustrates the fields and controls on the Regional page (3 of 12). You can find definitions for the fields and controls later on this page.



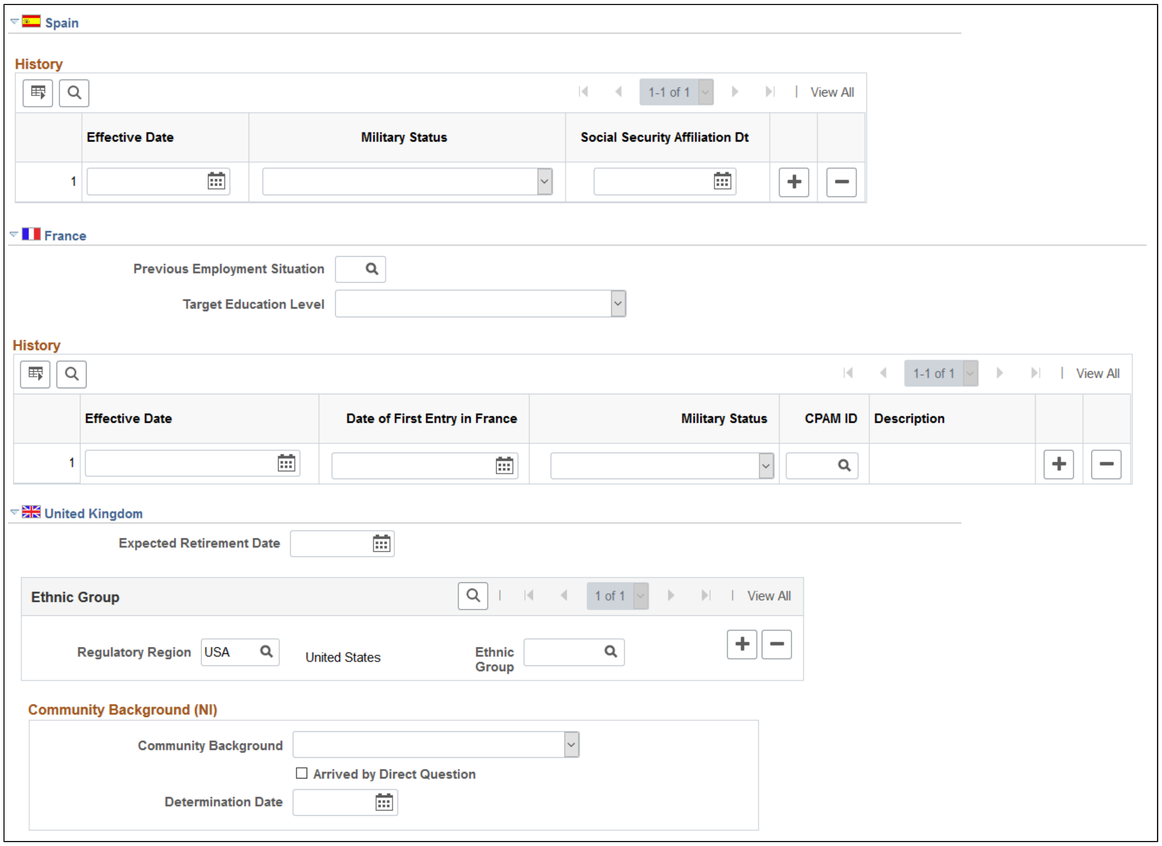
This example illustrates the fields and controls on the Regional page (4 of 12). You can find definitions for the fields and controls later on this page.



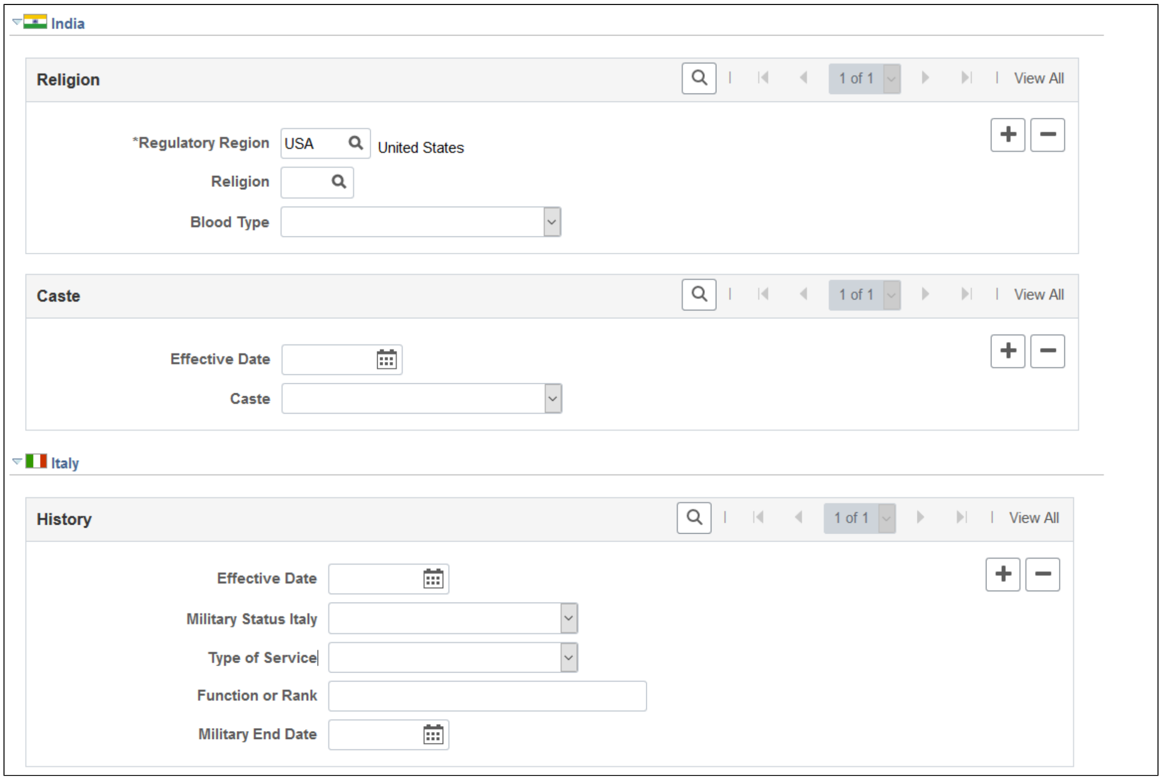
This example illustrates the fields and controls on the Regional page (5 of 12). You can find definitions for the fields and controls later on this page.



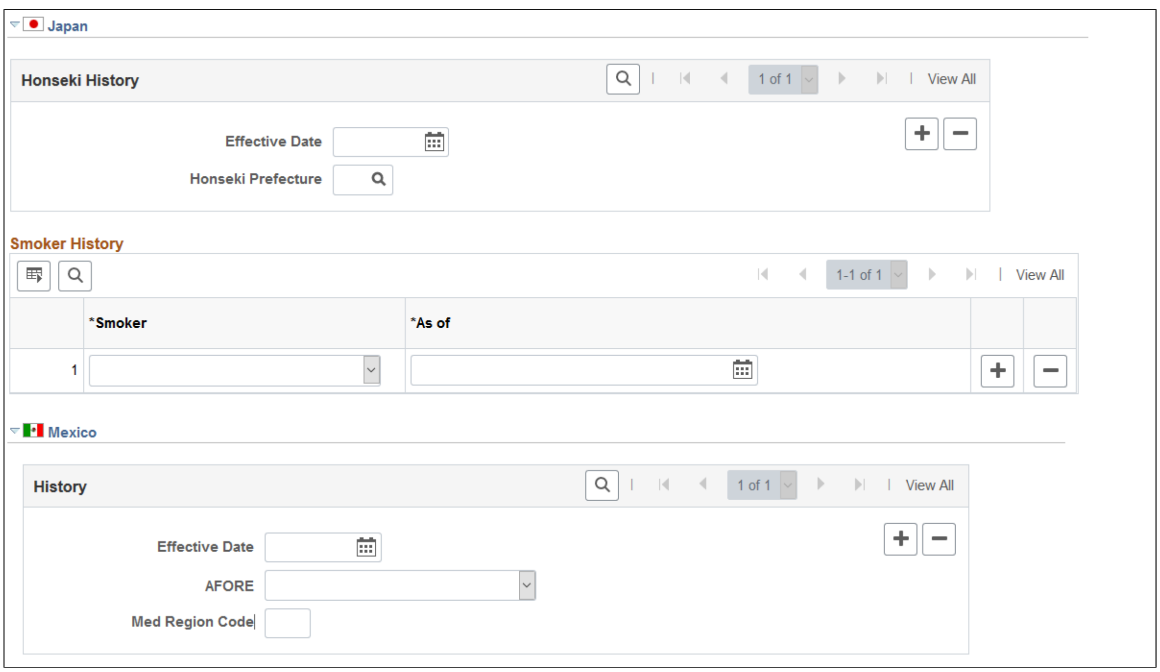
This example illustrates the fields and controls on the Regional page (6 of 12). You can find definitions for the fields and controls later on this page.



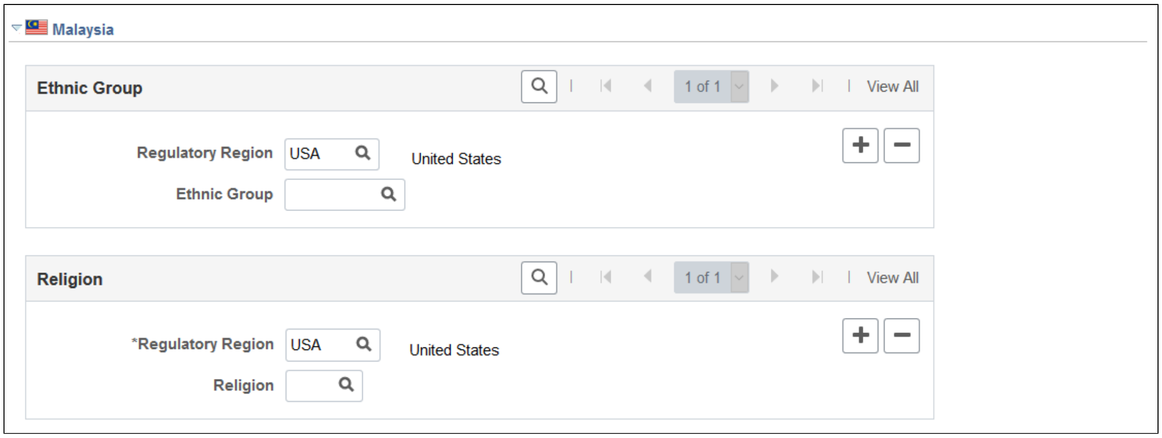
This example illustrates the fields and controls on the Regional page (7 of 12). You can find definitions for the fields and controls later on this page.



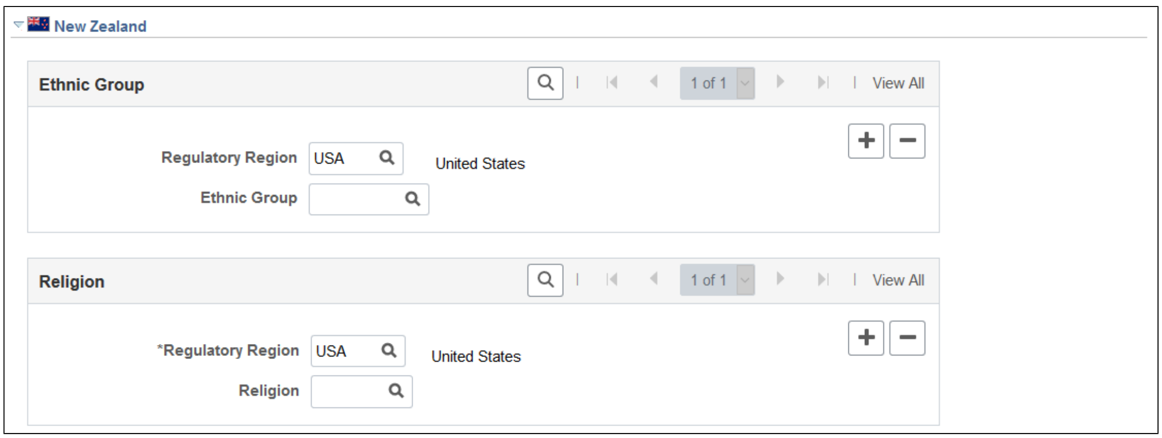
This example illustrates the fields and controls on the Regional page (8 of 12). You can find definitions for the fields and controls later on this page.



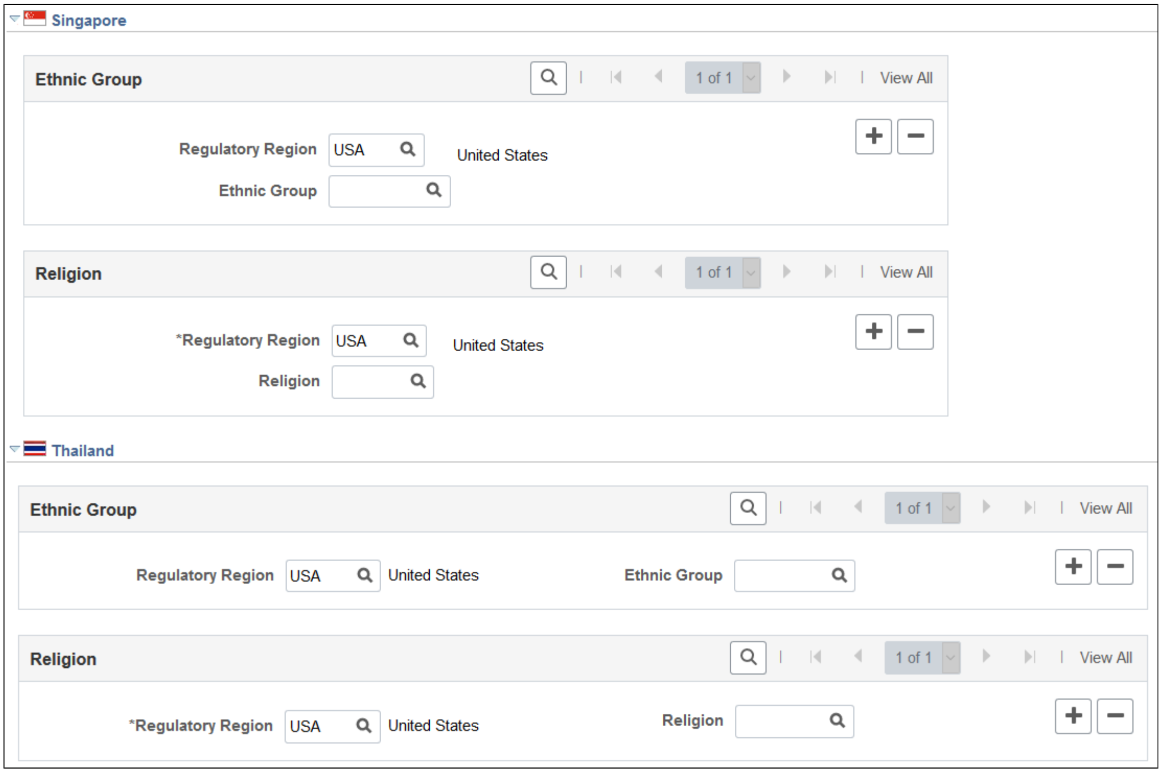
This example illustrates the fields and controls on the Regional page (9 of 12). You can find definitions for the fields and controls later on this page.



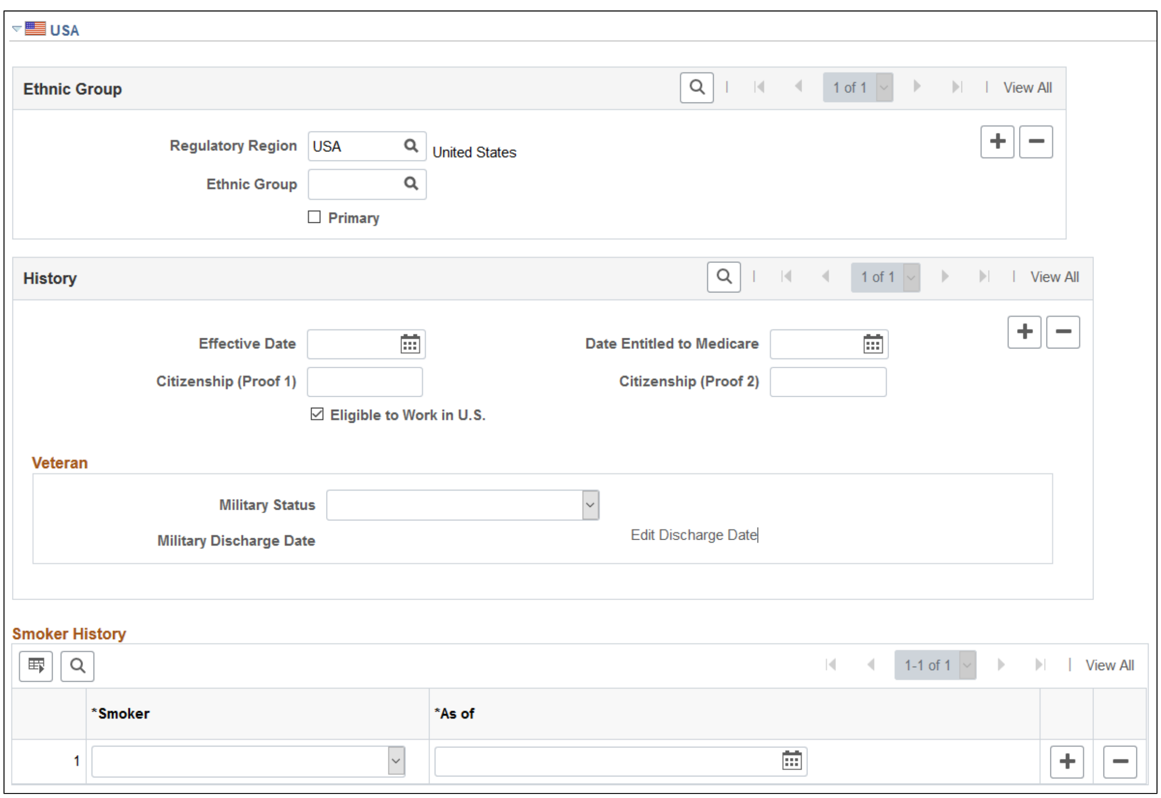
This example illustrates the fields and controls on the Regional page (10 of 12). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Regional page (11 of 12). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Regional page (12 of 12). You can find definitions for the fields and controls later on this page.



Local country laws that require employers to verify a person's nationality and eligibility to work in that country might require information that you enter here. Much of the data that you enter is required for regulatory reporting in PeopleSoft Human Resources.

(BRA) Brazil

Information entered in this section is used in eSocial reporting.

Field or Control	***Description***
(RG/RNE) **Issued By**	Enter the Registro Geral (RG) or Registro Nacional de Estrangeiros (RNE) issuing entity. This information is required if you enter the individual's general registry or foreigner ID number in the **National ID** group box.
Issued Date and **State**	Enter this information, which is required if you enter the individual's general registry or foreigner ID number.
Expiration Date	Enter the expiration date for the listed entity.
(RIC) **Issued By**	Enter the Registro de Identidade Civil (RIC) issuing entity. This information is required if you enter the individual's civil registry number in the **National ID** group box.
Issued Date and **RIC State**	Enter this information, which is required if you enter the individual's RIC number.
Expiration Date	Enter the expiration date for the listed entity.
(CTPS) **Series**	Enter the work card number.
Issued Date	Enter the work card's issued date. This information is required if a Carteira de Trabalho e Previdência Social (CTPS) number is provided.
State	Enter the political subdivision of the CTPS issuing agency. This information is required if a CTPS number is provided.
Expiration Date	Enter the expiration date for the listed entity.
(Voter Data) **Zone, Section, City,** and **State**	Enter this information, which is required if a voter registration card is provided.

Field or Control	***Description***
(Military Data) **Series, Region,** and **Category**	Enter this information, which is required if a reserve certificate is provided.
State	Enter the political subdivision of the issued reserve certificate. This information is required if a reserve certificate is provided.
Cert Type (certificate type)	Enter the type of military service. Values are: *Aeronautic, Army, Marine,* or *Other*. This information is required if a reserve certificate is provided.
(PIS/PASEP) **Issued Date**	Enter the date of issuance at PIS / PASEP. This information is required if the PIS/PASEP number is provided in the **National ID** group box.
(Class Entity Registration) **Issued By**	Enter the class entity registration issuing entity. This information is required if you enter the individual's class entity number in the **National ID** group box.
Issued Date and **State**	Enter this information, which is required if you enter the individual's class entity number.
Expiration Date	Enter the expiration date for the listed entity.
(History) **Regulatory Region** and **Ethnic Group**	Enter the regulatory region for the person. As you enter *BRA* as the regulatory region for a Brazilian employee, the system performs a number of validations, one of which checks for the presence of the ethnic group value. Specify the ethnic group when the regulatory region is set to *BRA*; this information is used in several Global Payroll for Brazil reports, including the RAIS and eSocial reports. Do not select *Unknown* as the ethnic group.
Country of Nationality	Select the nationality for the person from the Country table (COUNTRY_TBL). RAIS nationality codes were used previously.
Educational Level	Select the education level for the person.

Field or Control	***Description***
Residence Period	Specify whether the residence period of the person is *Determined* or *Undetermined*. Used in eSocial reporting, this value is required for individuals who were not born in Brazil. If the value is not specified for a non-Brazilian-born employee, the system generates a mapping error. See Also “Monitoring eSocial Events” (PeopleSoft Global Payroll for Brazil).
Immigration Condition	Select the immigration condition for the person. This field appears when you select a residence period. The list of values is different based on the selected residence period. Possible values include: *Asylum Seeker* - This value applies to the *Determined* residence period only. *Benefited - Mercosur Countries* *Benefited - Treaty BRA & POR* *Brazilian's Family* *Dependent of Diplomat/Consular* - This value applies to the *Determined* residence period only. *Other Conditions* *Refugee* - This value applies to the *Undetermined* residence period only.

(CAN) Canada

Field or Control	***Description***
Self Identification Data	Click this link to access the Self Identification Data Canada page, where you enter ethnic background information for the person. The Self Identification Data Canada page has two fields: • Use the **Visible Minority** field to indicate if the person's ethnic background is apparent based on physical appearance. • Use the **Aboriginal Person** check box to indicate if the person is a Canadian aboriginal person. The Self Identification Data link is visible only to users with access to the Self Identification Data Canada page. To secure this page and protect the confidentiality of the ethnicity data, you can use the delivered permission list *HCCPHR40CA* and the delivered role *HR Admin CAN Confdl Data.*
Bilingualism Code	Record the appropriate code for the person. If the Official Languages Act applies to the organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government.
Health Care Number and **Health Care Province**	Enter a number and select the health care province.

(CHE) Switzerland

Field or Control	***Description***
Guardian	Minors who are age 18 or younger or people with mental illness must have a parent or guardian sign employment contracts on their behalf. Enter the name of the parent or guardian who is authorized to act for this employee.
Place of Origin	Enter a place of origin. Every Swiss person has at least one place of origin, usually determined by the father or husband's birthplace.
Main Origin	Select if the place of origin in the **Place of Origin** field is the person's main place of origin. (A person can have more than one place of origin.)

(CHN) China

Field or Control	***Description***
Regulatory Region	Enter a regulatory region for the person.
Ethnic Group	Enter the person's ethnic group.
Religion	Enter the person's religion.
Hukou Type	Enter the person's Hukou type.
Hukou Location	Enter the person's Hukou location.
Working Life Start Date	Enter the date on which the person first began to work.
Working & Living Status	Enter the status of the worker's working and living permit. Values are: *Expired, Granted,* and *Renewed.*
Issue Date	Enter the date on which the working and living permit was issued.
Renew Date	Enter the date on which the working and living permit was renewed.
Expiration Date	Enter the date on which the working and living permit expires.

(DEU) Germany

Field or Control	***Description***
Expected Military Date	If the person hasn't already completed military service, enter the date when service is expected to begin.
HR Responsible ID	Select the ID of the human resources representative responsible for this person.
Nationality Date	Enter the effective date of the person's nationality status. If the employee is a native citizen of the country, enter the person's birth date. If the person is a naturalized citizen, enter the date on which the person became a citizen.

Field or Control	***Description***
Nationality	Enter the person's nationality by selecting a nationality code. German labor laws require recording an employee's nationality to determine if the employee is eligible to work in certain industries, particularly those that are related to technology or defense. Use the nationality code to determine the employee's eligibility to work in a regulated industry based on the employee's country's participation in OECD or the European Union. You can maintain information about whether each nationality code participates in the OECD and European Union. **Note:** Duevo-compliant nationality codes are established by the Duevo Directive and are provided by the PeopleSoft system.

(DEU) German Public Sector

This section is available when German Public Sector is selected on the Installation Table.

The system uses this information when performing validations using the disability processing rules defined for the job group/service class information. The maximum age for hiring a person identified as disabled is different than for a person who is not identified as disabled for certain employee categories and service class group combinations.

The disability selection here displays on the Job Data-“German Public Sector Page” (PeopleSoft Human Resources Manage German Public Sector) and is also maintained in the Disabilities component.

Field or Control	***Description***
Disabled	Select if the person is disabled.

(ESP) Spain

Field or Control	***Description***
Social Security Affiliation Dt (social security affiliation date)	Enter the date when the person is assigned a Spanish social security number.

(FRA) France

Field or Control	*Description*
Date of First Entry in France	Leave blank if the person is a native-born French citizen. If the person is foreign-born, enter the date on which the person first arrived in France. This data is used to maintain work visa information for foreign workers who are employed in France.
CPAM ID (Caisse Primaire d'Assurance Maladie ID)	Enter the code of the CPAM ID that is assigned to the person. CPAM depends on the person's home address. The CPAM is the social security body that compensates persons for illness and work accidents.

(GBR) United Kingdom

Field or Control	*Description*
Expected Retirement Date	The system calculates and displays this value, based on the system date and the birth date that you enter on this page. This field is for information only; you can't change it.

A person's expected retirement date is based on the birth date that you enter on the Name/Location page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women will gradually increase to 65 years between 2010 and 2020. This table shows the expected retirement dates for women in the U.K.:

Birth Date	*Expected Retirement Age*
Before April 6, 1950.	60 years.
After April 6, 1950 and before April 6, 1955.	Retirement date is delayed one month for each month that the woman is born after April 6, 1950.
After April 6, 1955.	65 years.

The calculation that the system uses to determine the retirement age of U.K. employees is stored in FUNCLIB_HR_UK.EXP_RETIRE_DT.FieldFormula.

(GBR) Community Background

The system displays the following fields only if you're logged in as an authorized user. Northern Ireland law requires that only a designated monitoring officer see community background data for employees.

The system includes a special user class (UKNIPNLS) and user ID (UKNI) for you to use to enforce these rules.

Field or Control	***Description***
Community Background	Select the person's community background: *Protestant, Catholic,* or *Undetermined/Other.*
Arrived by Direct Question	Select if you determine the person's community background by asking the employee directly.
Determination Date	Enter the date on which you determine the person's community background category. The data that you enter about a Northern Ireland worker's community background is required under the Fair Employment Act. Employers must include this information in the Northern Ireland report (UKNI001) that they submit to the administrative body that monitors employment in Northern Ireland. This report provides an annual summary of the state of the workforce for a particular employer and breaks down employees and applicants for employment into their respective community background categories.

(IND) India

Field or Control	***Description***
Blood Type	Select the person's blood type or select *Unknown.* When the blood type is entered on this page at the time that an employee is hired, a component interface updates the employee's blood type on the physical exam record. Thereafter, this field is disabled and displays by default the blood type data from the physical exam record.
Caste	Select the person's caste.

(ITA) Italy

Field or Control	***Description***
Type of Service	Select the type of service that the person performed in the military.

Field or Control	Description
Function or Rank	Enter the function or rank that was held by the person in the military.
Military End Date	Indicate the date on which the person's military service ended, if applicable.

(JPN) Japan

Field or Control	Description
Honseki Prefecture	Select the family prefecture, or place of registration. Tracking a person's Honseki Prefecture is a matter of custom.

(MEX) Mexico

Field or Control	Description
AFORE (Retirement Funds Institution Code Mexico)	Enter the AFORE for the employee. Values include: *Banamex, Bancomer, Dresdner, GNP, Garante, ING, Inbursa, Principal, Santander, Tepeyac, XXI,* and *Zurich.*
Med Region Code (medical region code)	Enter the three-character code for the medical region where the person resides.

(MYS) Malaysia, (THA) Thailand, and (SGP) Singapore

In Malaysia, Thailand, and Singapore, you use the **Ethnic Group** and **Religion** fields for eligibility and calculation of festive advances.

(USA) United States

Field or Control	***Description***
Ethnic Group	Enter one of more ethnic groups for a person. Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports. Ethnicity is also used when populating the Employee table during the Refresh Employees Table process. The Refresh Employees Table process (PER099) uses this information. See Understanding the Process of Refreshing the Employees Table.
Primary	Select the primary ethnicity for a person, if applicable.
Date Entitled to Medicare	(Optional) Enter the date on which this person is entitled to receive Medicare coverage.
Citizenship (Proof 1) and **Citizenship (Proof 2)**	Enter two forms of ID (for example, *passport* and *Social Security card)* to prove U.S. citizenship (required by U.S. law).
Eligible to Work in U.S.	Select if the person is eligible to work in the U.S.
Military Status	Shows the military status option selected by the employee on the Veteran Status Page. Administrators can update the selection. Changes made here will be reflected in self service. The default values is a blank field.
Military Discharge Date	Displays the military discharge date entered by the employee in the **Military Discharge Date** field on the Veterans Status self-identification page (or edited on the Military Discharge Date page). This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.
Edit Discharge Date	Click to access the Military Discharge Date page where you can edit the employee’s military discharge date.

(FPS) French Public Sector

The information that you enter here is mandatory for including an employee in the French Public Sector security system.

Field or Control	***Description***
Supporting Document Required	Select to track supporting documents. The system inserts a row in the **Supporting Documents** group box. The row is identified by the person ID, the action code, and the effective date and enables you to verify that the person provided the required documents.

For more information, see product documentation for *PeopleTools: Process Scheduler* and *PeopleTools: Global Technology*

Related Links

Understanding French Social Security Tracking Code Maintenance

“Understanding Regulatory Requirements for Canada” (PeopleSoft Human Resources Meet Regulatory Requirements)

“Understanding Payroll Data” (PeopleSoft Payroll for North America)

“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)

“(JPN) Setting Up Japanese Control Tables” (Application Fundamentals)

“Effective Dates” (Application Fundamentals)

“Understanding Language Support in PeopleSoft” (Application Fundamentals)

“Understanding PeopleSoft HCM System Data Regulation” (Application Fundamentals)

“Maintaining the ASCO Table” (PeopleSoft Human Resources Meet Regulatory Requirements)

“Creating Reports for the PSMPC” (PeopleSoft Human Resources Meet Regulatory Requirements)

“Understanding French Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)

“Tracking Supporting Documents” (PeopleSoft Human Resources Manage French Public Sector)

“Understanding U.K. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)

“Understanding U.S. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)

Veteran Status Page

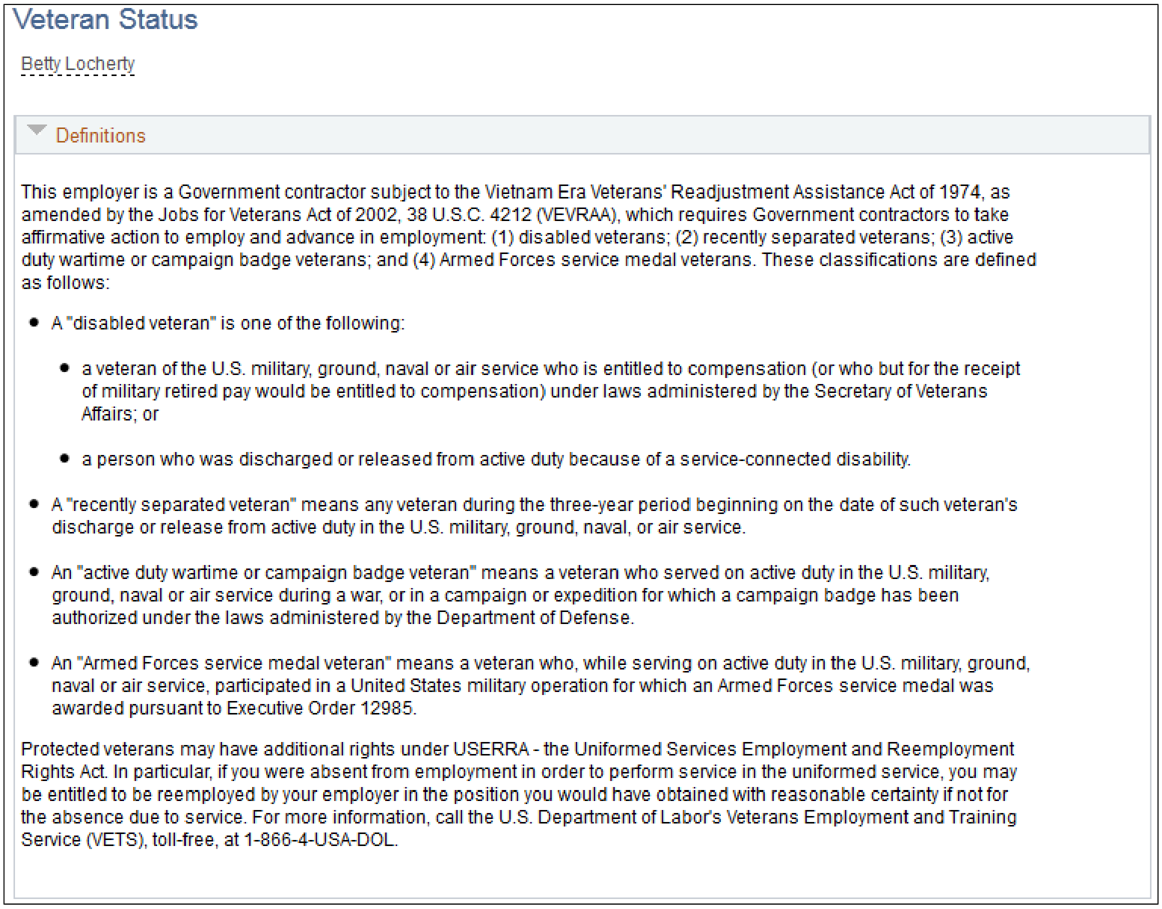
Employees use the Veteran Status page (HR_VETERAN_STATUS) to enter and update self-identification veteran information.

Navigation:

Self-Service > **Personal Information** > **Veteran Status**

Note: The Fluid self-service Veteran Status page (HR_VET_STATUS_FL) is also available for smart phones and tablets. See "Veteran Status Page" (PeopleSoft eProfile) in your PeopleSoft eProfile product documentation.

This example illustrates the fields and controls on the Veteran Status page (1 of 3). You can find definitions for the fields and controls later on this page.



Veteran Status

Betty Locherty

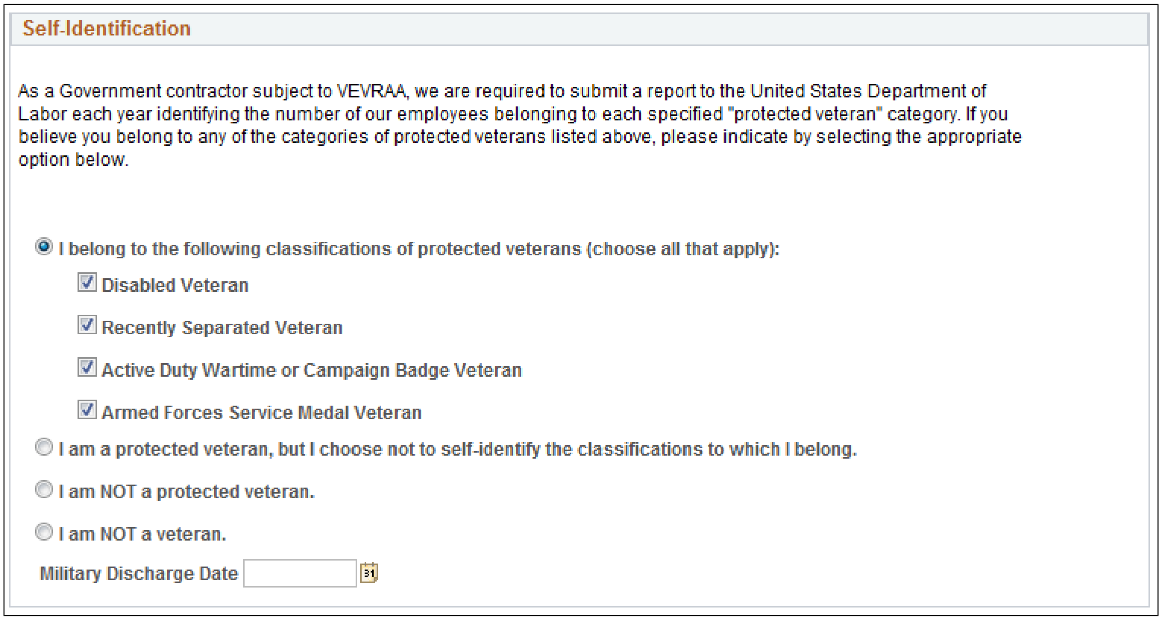
Definitions

This employer is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires Government contractors to take affirmative action to employ and advance in employment: (1) disabled veterans; (2) recently separated veterans; (3) active duty wartime or campaign badge veterans; and (4) Armed Forces service medal veterans. These classifications are defined as follows:

- A "disabled veteran" is one of the following:
  - a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs; or
  - a person who was discharged or released from active duty because of a service-connected disability.
- A "recently separated veteran" means any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.
- An "active duty wartime or campaign badge veteran" means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.
- An "Armed Forces service medal veteran" means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

Protected veterans may have additional rights under USERRA - the Uniformed Services Employment and Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4-USA-DOL.

This example illustrates the fields and controls on the Veteran Status page (2 of 3). You can find definitions for the fields and controls later on this page.



Self-Identification

As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please indicate by selecting the appropriate option below.

I belong to the following classifications of protected veterans (choose all that apply):

Disabled Veteran

Recently Separated Veteran

Active Duty Wartime or Campaign Badge Veteran

Armed Forces Service Medal Veteran

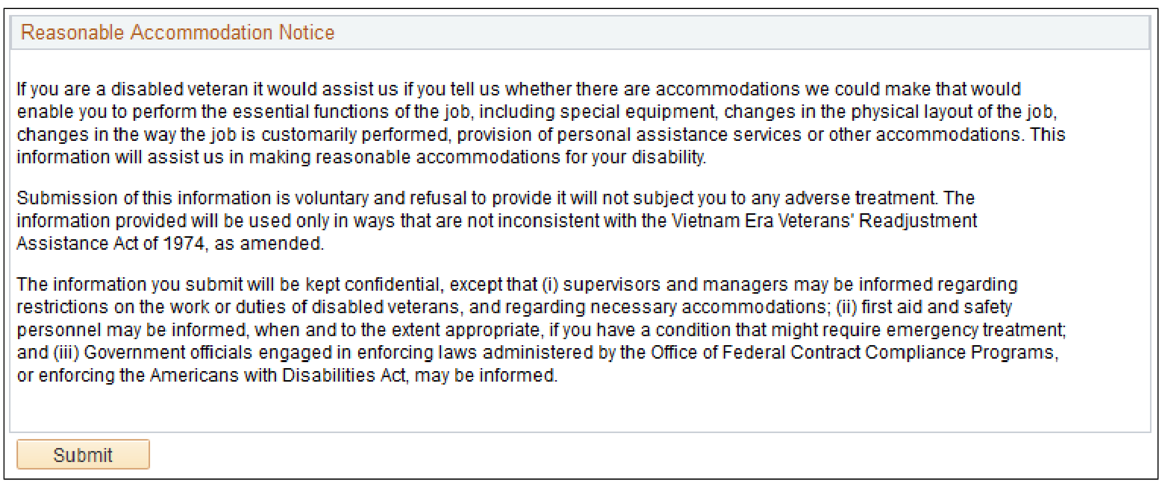
I am a protected veteran, but I choose not to self-identify the classifications to which I belong.

I am NOT a protected veteran.

I am NOT a veteran.

Military Discharge Date

This example illustrates the fields and controls on the Veteran Status page (3 of 3). You can find definitions for the fields and controls later on this page.



Reasonable Accommodation Notice

If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are not inconsistent with the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended.

The information you submit will be kept confidential, except that (i) supervisors and managers may be informed regarding restrictions on the work or duties of disabled veterans, and regarding necessary accommodations; (ii) first aid and safety personnel may be informed, when and to the extent appropriate, if you have a condition that might require emergency treatment; and (iii) Government officials engaged in enforcing laws administered by the Office of Federal Contract Compliance Programs, or enforcing the Americans with Disabilities Act, may be informed.

Submit

PeopleSoft uses the Text Catalog to deliver the page with verbiage compliant with OFCCP self-identification veteran regulations. Administrators can change the text as necessary.

Self-Identification

One radio button option must be selected. Fields become available or unavailable based on the selection made.

When the employee submits the Veteran Status page, the system displays the veteran self-identify data in the Veteran group box on the Add a Person or Modify a Person - Regional Page in the Personal Information – Add a Person or Modify a Person component.

(Fluid) Adding a Person

To create a person record, use the Add a Person component (PERSONAL_DATA_FL). Use the CI_PERSONAL_DATA component interface to load data into the table for this component.

The following videos provide an overview and demonstration of how to use the fluid Person Data modification feature:

Video: Image Highlights, PeopleSoft HCM Update Image 47: Person Data Modernization

Video: Person Data Modernization

These topics provide an overview of identification assignment, the Add Person, Modify Person, or organizational relationship component layouts, and discuss how to add a person in fluid.

Pages Used to Add a Person Using Fluid

Page/Section Name	***Definition Name***	***Usage***
Add Person Tile	HC_HR_PERS_ADD_FL_GBL (this is the cref for the tile)	Create a new Person Data record without adding an organizational instance.
Add Person Page	SRCH_PERSON_FL	Perform a search for duplicate employee/person IDs (with the ability to view or modify existing person records) and add a person record without a job organizational relationship.
Request Details Page	HR_CREATE_DTL_SCF	Enter a person's ID or employment record number.
Person Data Page	PERSONAL_DATA_FL	Enter personal details, contact information, and regional information about a person in fluid.
Person Data Page - Person Details Section	N/A (See the Person Data page)	Enter name and other biographical information.
Name Page	HR_NM_DIS_SCF	View how the system pages will show the display, formal, and full name.
Name Page	HR_NM_EDIT_SCF	Update or add name information and view or add attachments to support the change.

Page/Section Name	***Definition Name***	***Usage***
Biographical Details Page	HR_BIO_PD_SCF	Record details about a person's education level, marital status, gender and orientation details, and add supporting attachments.
<Gender Field Label> Values Page	HR_GENDER_DTL_SCF	View gender field value descriptions
National ID Page	HR_NID_PD_SCF HR_NID_PD_VW_SCF	Enter national ID information for a person and add supporting attachments.
Person Data Page - Contact Information Section	N/A (See the Person Data page)	Enter or edit a person's contact information.
Add (or Edit) Address Page Add Another Address Page Edit Address Page	HR_ADD_ADDRESS_SCF HR_ADDRESS_SCF	Add or manage addresses for a person and add supporting attachments.
Phone Number Page	HR_ADD_PHONE_SCF	Enter or edit a person's phone number information.
Email Address Page	HR_PERS_EMAIL_SCF	Enter or edit a person's email information.
Person Data Page - Regional Section	N/A (See the Person Data page)	Enter country-specific personal information.
(BRA) History Page	HR_PERS_BRA_SCF	Add details about a person's ethnicity, blood type, education, residency, and so forth.
(CAN) Canada Self IdentificationData Page	CAN_SLF_ID_DATA_FL	(CAN) Enter identification information for Canada.
(USA) Work Status Page	PERSON_USA_SCF	Enter Medicare, citizenship, military information, and add supporting attachments.
Person Data Page - CheckList Section	N/A (See the Person Data page)	Identify a checklist of tasks to perform after adding this person.

Page/Section Name	Definition Name	Usage
Person Data Page - <Drop Zone> Section	N/A (See the Person Data page)	Enter information for custom steps that use drop zones embedded in your activity guide process.
Person Data Page - Validation Section	N/A (See the Person Data page)	View error and warning messages related to the Person Data validation process, if any.
Add Person - Summary Page	PERSONAL_DATA4_FL	View the proposed information you are adding for a person record.
Person Confirmation Page	PERSON_DATA_SUB_FL	Confirm that a person record was successfully created. You can also initiate the process to add or modify person data, creating or view organizational relationships, manage a person's checklist, or view or modify job data for an existing person.
Update Personal Data-Future Page	PRCSRUNCNTL	Run this process shortly after midnight to update the Personal Data component. The process will update data with new, effective information that is not currently in the component. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

Understanding Identification Assignment

When you access the Add Person or one of the Create <Organizational Relationship> components, the system may request you enter an employee ID on the Request Details Page.

Note: The **Empl ID** and **Empl Record** fields will appear only if configured on the Person and Job Installation - Person and Organization Page to not be hidden.

There are two ways to assign IDs:

- Automatically

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

  The system maintains the last assigned ID on the Installation Table - “Last ID Assigned Page” (Application Fundamentals).

Note: If configured to hide the employee ID upon entry, the system will use the automatic method of assignment.

- Manually

  You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

  Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

Important! To avoid maintaining two different sets of IDs, it is recommended that you use only one method to assign them: either always assign them manually or always let the system assign them.

Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid

The Manage Human Resources Dashboard consists of several tiles that enable the HR administrator to add and maintain person, organizational relationships, and job data via fluid tiles and components.

Many of the Manage Human Resources tiles and pages use activity guides to provide a simplified and streamlined approach to completing a business process. These fluid tiles access components and pages that appear within the context of an Activity Guide Composer process.

- Add Person Tile
- Create Employee Tile
- Create Contingent Worker Tile
- Create Person of Interest Tile
- (Fluid) Organizational Relationship Tile
- Modify Person Tile
- Manage Job Tile**

**This topic discusses the Add Person, Create <Organizational Relationship>, Organizational Relationship, and Modify Person component layouts, which have a similar layout. For information on the Manage Job layout, see The Activity Guide Composer Framework for the Manage Job Component.

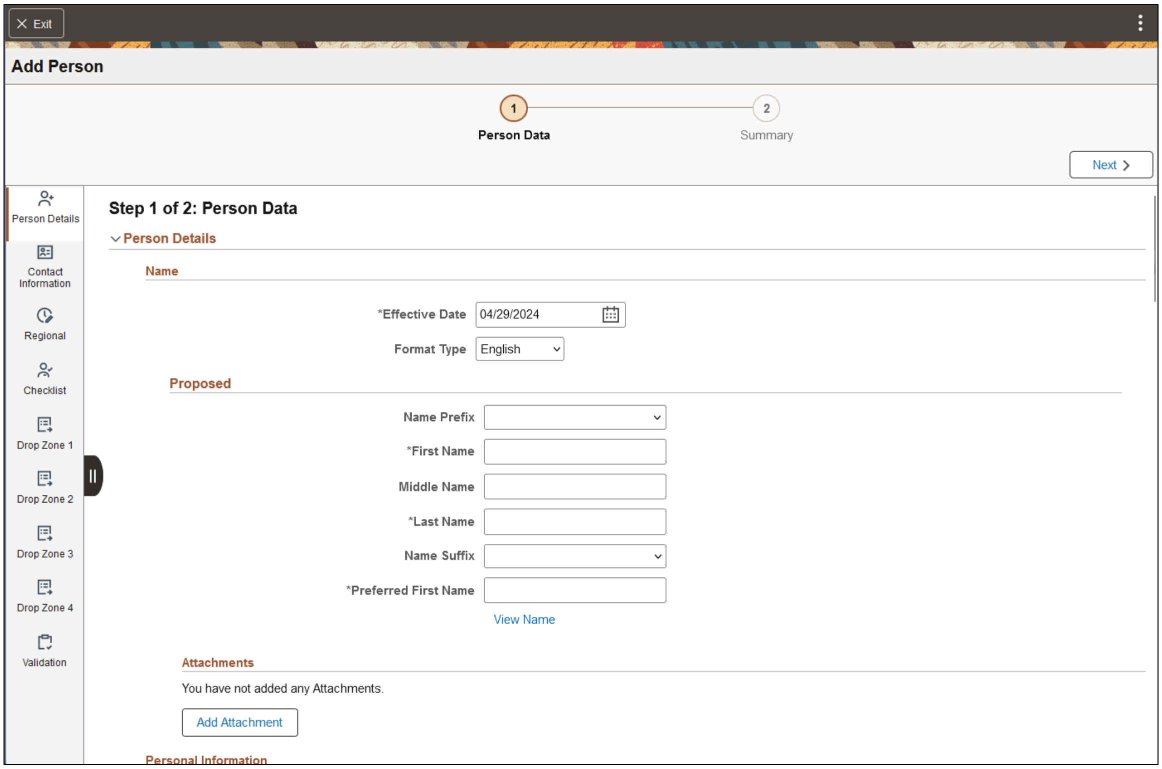
Note: The text "<Organizational Relationship>" is used throughout this documentation to represent "Employee", "Contingent Worker", or "Person of Interest".

Activity Guide Page Layout - Page Header (Sub-Banner)

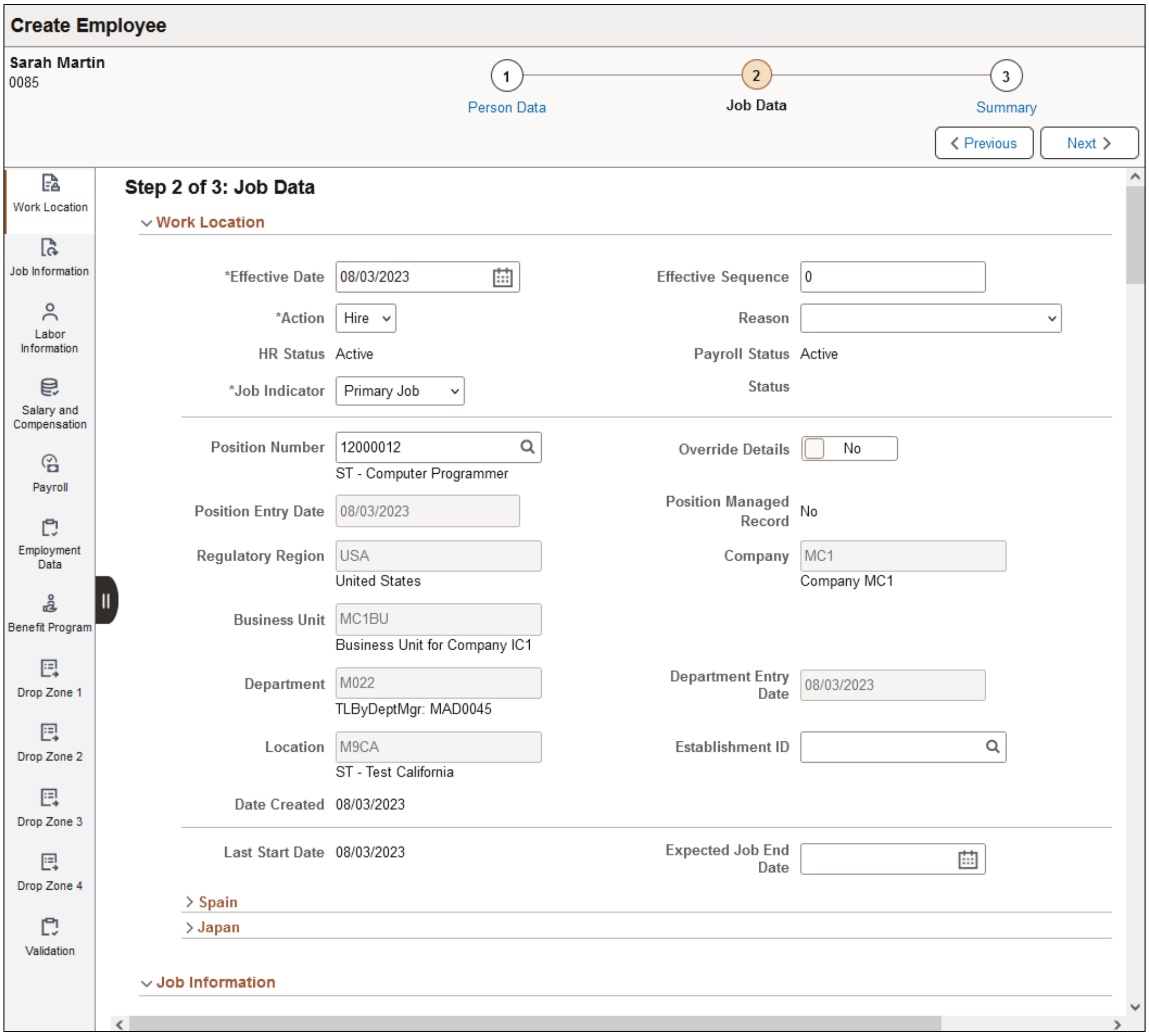
The fluid person and organizational relationship components use a horizontal non-sequential activity guide template to render the guided process.

The top (sub-banner) shows the page (step) navigation at the top.

This example illustrates the Person Data layout in fluid and consists of the Person Data and Summary pages.



This example illustrates the Create Employee layout in fluid and consists of the Person Data, Job Data, and Summary pages.



In addition to the horizontal page steps that appear within the sub-banner, the activity guide may also display the following buttons:

Field or Control	***Description***
Next button	Select this button to initiate the Validation process for a page. This will check for entry errors or warnings. If the process does not find errors or warnings, or you choose to ignore the warning messages, the activity guide moves you to the next page in the horizontal process. For Person Data, that would be the Summary page. For the creation of an organizational relationship (employee, contingent worker, or person of interest), the process would move to the Job Data page.

Field or Control	***Description***
Previous button	The **Previous** buttons appears on Job Data and Summary pages to allow you to navigate back to a previous step and make changes, as needed.

Section Navigator and Sections

The left panel displays sections within a page step. Quickly navigate to a section within the page by selecting the section in the left panel.

The Person Data page provides quick access to these page sections:

- Person Data Page - Person Details Section
- Person Data Page - Contact Information Section
- Person Data Page - Regional Section
- Person Data Page - CheckList Section
- Person Data Page - <Drop Zone> Section
- Person Data Page - Validation Section

The Job Data page provides quick access to these page sections:

- Job Data Page - Work Location Section
- Job Data Page - Job Information Section
- Job Data Page - Labor Information Section
- Job Data Page - Salary and Compensation Section
- Job Data Page - Payroll Section
- Job Data Page - Employment Data Section
- Job Data Page - Benefit Program Section
- Job Data Page - <Drop Zone> Section
- Job Data Page - Attachments Section (when attachments are enabled)
- Job Data Page - Validation Section

The Summary page shows proposed changed you have entered on these pages and allows you to submit transaction.

Delivered Templates for Person and Organizational Relationship

The PeopleSoft HCM application delivers the following templates and page steps for these tiles and pages to add or modify persons and create organizational relationships:

Tile/Component	***Description***	***Template***	***Category***	***Pages (Steps)***
Add Person Tile	Add a Person record only. **Note:** You can add a relationship at a later point of time using the Organizational Relationship tile.	PERSON2 (Person)	HR_PERSDATA (Person)	• Person Data • Summary and Review
Modify Person Tile	Modify the Person record only.	PERSON2 (Person)	HR_PERSDATA (Person)	• Person Data • Summary and Review
Create Employee Tile	Add a new Person and Job Data record with an employee relationship in the system.	HRPJORG	Manage Person & Org Relationship (HR_ PERSONORGREL)	• Person Data • Job Data • Review and Submit (Summary)
Create Contingent Worker Tile	Add a new person with a continent worker relationship in the system.	HRPCWRJ (Create Contingent Worker)	Manage Person & Org Relationship (HR_ PERSONORGREL)	• Person Data • Job Data (Employment Data) • Review and Submit (Summary)
Create Person of Interest Tile	Add a new Person and Job Data record with a person of interest relationship (with a job) in the system.	HRPPOIJ	Manage Person & Org Relationship (HR_ PERSONORGREL)	• Person Data • Job Data • Review and Submit
(Fluid) Organizational Relationship Tile	Add an organizational relationship for a person already in the system (employee, contingent worker, or person of interest with a job).	ADDORG1 (Add Job Relationship)	Add Job Relationship (HR_JOBREL_ADD)	• Job Data • Review and Submit

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Note: You must be assigned the *Job Data AG Administrator* role to add or modify these activity guide templates.

To understand or set up templates using the Activity Guide Composer, see the Understanding the Activity Guide Composer documentation.

Add Person Tile

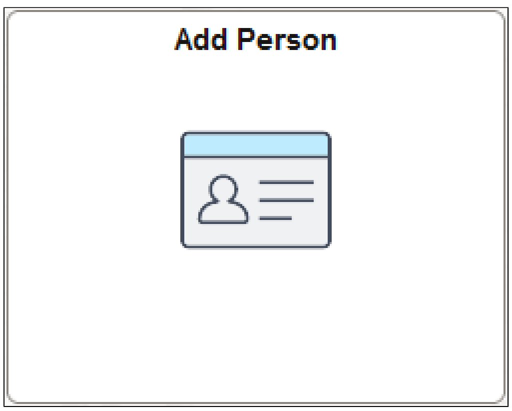
Administrators use the Add Person tile to create a new person record without adding an organizational instance.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin Add Person* role.

Navigation:

The Add Person tile is delivered as part of the fluid Manage Human Resources Dashboard.

This example illustrates the Add Person tile

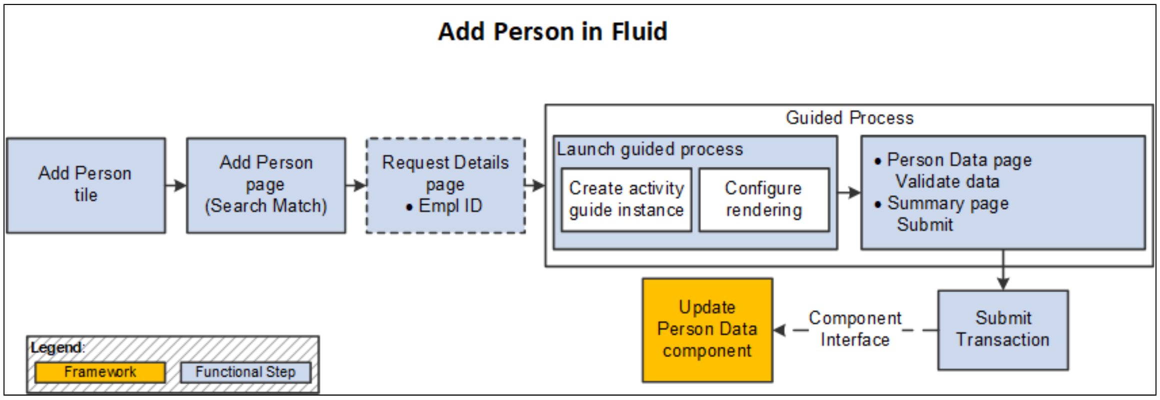


Select this tile to begin the process to create a new person record.

Add Person Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly create and process a new person transaction:

This diagram shows the high-level functional pages and steps to add a person using the fluid pages.



1. Select the Add Person Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Add Person Tile**).
2. Use the Add Person Page to perform the Search/Match process to find potential Person Data matches in the system for this person or initiate the process to add a new person record.

   When using Search/Match, one of the following will occur:

   - *No Duplicate Found*: the process will continue with the Add Person process and will move to either the Request Details or Person Data page, depending on your installation settings.
   - *Duplicate Found*: the page will display the **Potential duplicates** grid for you to review duplicate person information. Options are available to view and add organizational relationships for a person or view or edit existing person data. If there is no person match, select the **Add Person** button to continue with the Add Person process.

3. The Request Details Page appears when the employee ID entry is configured to display.

   Enter an ID or leave the field blank to have the system automatically assign the person's ID (see Understanding Identification Assignment).

   For configuration settings, see Person and Job Installation - Person and Organization Page.
4. Select to continue to the Add Person activity guide process.

   There are two steps in this activity guide:

   - The Add Person - Person Data Page to enter person details.
   - The Add Person - Summary Page to review the data.

5. Submit the information to add the Person Data record.

   Note: The Add Person process does not use Approvals.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

Add Person Page

Use the Add Person page (SRCH_PERSON_FL) to perform a search for duplicate employee/person IDs (with the ability to view or modify existing person records) and add a person record without a job organizational relationship.

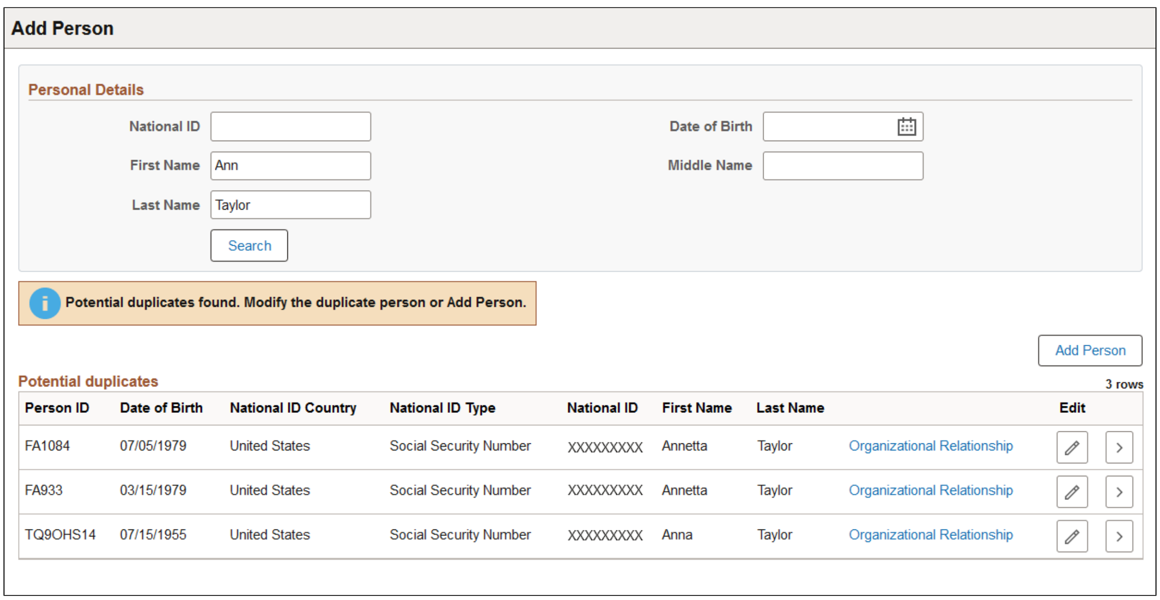
Note: A person added from this page will be assigned the organizational relationship of *Person of Interest - Other*.

Navigation:

Select the Add Person Tile on the Manage Human Resources home page.

Note: You can also access this page from the Create Employee Tile, Create Contingent Worker Tile, and Create Person of Interest Tile, but the title varies to reflect the transaction you are performing.

This example illustrates the Add Person page.



The search uses the logic delivered by the Search/Match framework. Configuration for Search/Match is available from **Set Up HCM** > **System Administration** > **Utilities** > **Search/Match**.

Field or Control	***Description***
Person Details group box	Enter key field values that may identify a person, then select the **Search** button to initiate the Search/Match process.

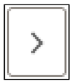
Field or Control	***Description***
Search button	When you have entered search criteria, select this button to initiate the search match. When the process finds possible matches, the page will display the **Potential duplicates** grid. When the search criteria is blank, or no potential matches are found, one of the following pages will open depending upon your Person and Job Installation - Person and Organization Page settings: • Request Details Page • Person Data Page When you enter person details that do not return a match, the values you entered will be added to the Person Data page by default. For example, if you add the person's first and last name and date of birth, the corresponding fields will auto populate with these same values.
Add Person, **Create Employee**, **Create Contingent Worker**, or **Create Person of Interest** button	The name of the button will vary based on the tile you used to access the this page. A button to add a person or organizational relationship will appear after you have performed a search match. Select this button to access the Person Data pages and begin the process to add the person.

Potential duplicates

This grid box appear after you have entered **Personal Details** field values, selected the **Search** button, and the process has identified possible matches in the system.

The grid displays a list of likely Person Data records in the system that may match the person you are trying to add.

Field or Control	***Description***
Organizational Relationship link	Select this link to access the (Fluid) Organizational Relationship Page to view a summary of a person's organizational relationships. You must have security access for this person to view the organizational relationship.
 (Edit) button	Select this button to access the Person Data page (Modify Person component) in correction mode and make edits to a Person Data record already in the system. You must have security access for this person to edit the personal data.

Field or Control	***Description***
 (View Person Details) button	Select to access the Personal Data page in view mode to verify if this is the same person. You must have security access for this person to view personal data.

Request Details Page

Use the Request Details page (HR_CREATE_DTL_SCF) to enter a person's ID or employment record number.

Note: Availability of this page and what it displays is determined by the Person and Job Installation - Person and Organization Page settings for hiding the employee ID or record number. When the configurations are set to hide both the employee ID and employment record number, this page will not appear.

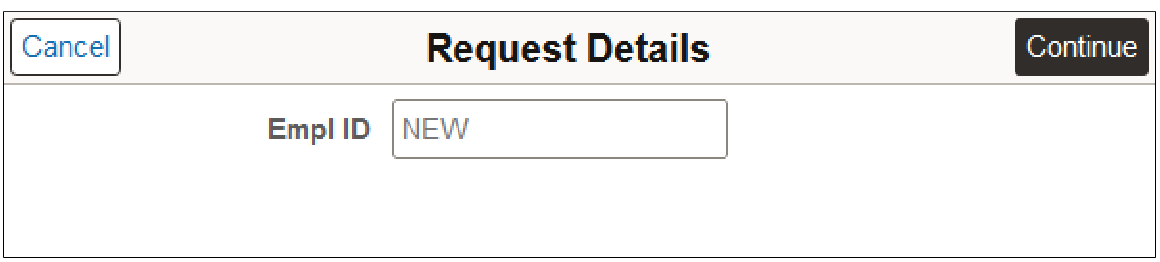
Navigation:

Select one of the following buttons from the Add Person Page.

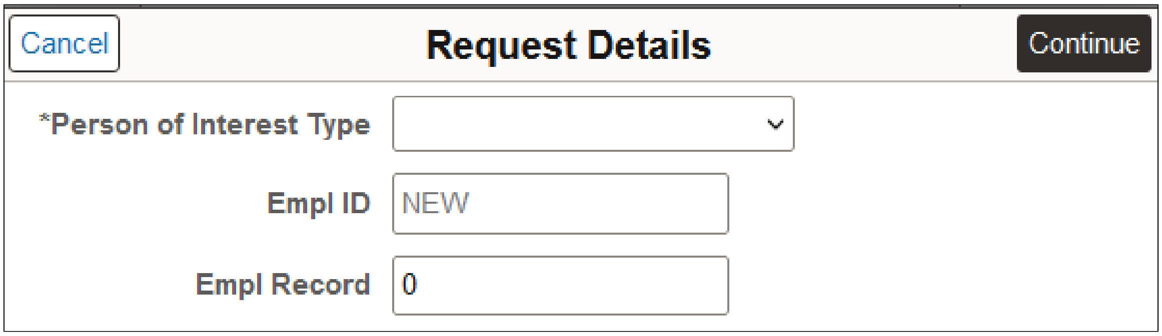
- **Search** (when search match is not used)
- **Add Person**

Note: You can access this same page from the Create Employee Page (**Create Employee** button), Create Contingent Worker Page (**Create Contingent Worker** button), and Create Person of Interest Page (**Create Person of Interest** button).

This example illustrates the Request Details page when accessed from the Add Person tile.



This example illustrates the Request Details page when accessed from the Create Person of Interest tile.



Use the Person and Job Installation - Person and Organization Page to configure if you want to hide or show the following fields.

Field or Control	Description
Person of Interest Type	This field is available when you access the page from the Create Person of Interest tile. Select a person of interest type that is associated with a job.
Empl ID (employee ID)	This field is available when you access the page from the Add Person or Create <Organizational Relationship> tiles when the **Allow hiding of Employee ID entry** check box is deselected on the setup configuration page. (Auto ID assignment) If you are adding a new person and are using system-assigned IDs, the field displays the value *NEW* and assigns the ID after you save the Person Data record. (Manual ID entry) Enter an ID. The Person Data page displays the value you entered in the banner when you access the page.
Empl Record (employment record)	This field is available when you access the page from the Create <Organizational Relationship> tiles when the **Allow hiding of Employee Record entry** check box is deselected on the setup configuration page. Leave blank to have the system automatically enter the next sequential employment record number, or you can enter your own number.

Related Links

Request Details Page

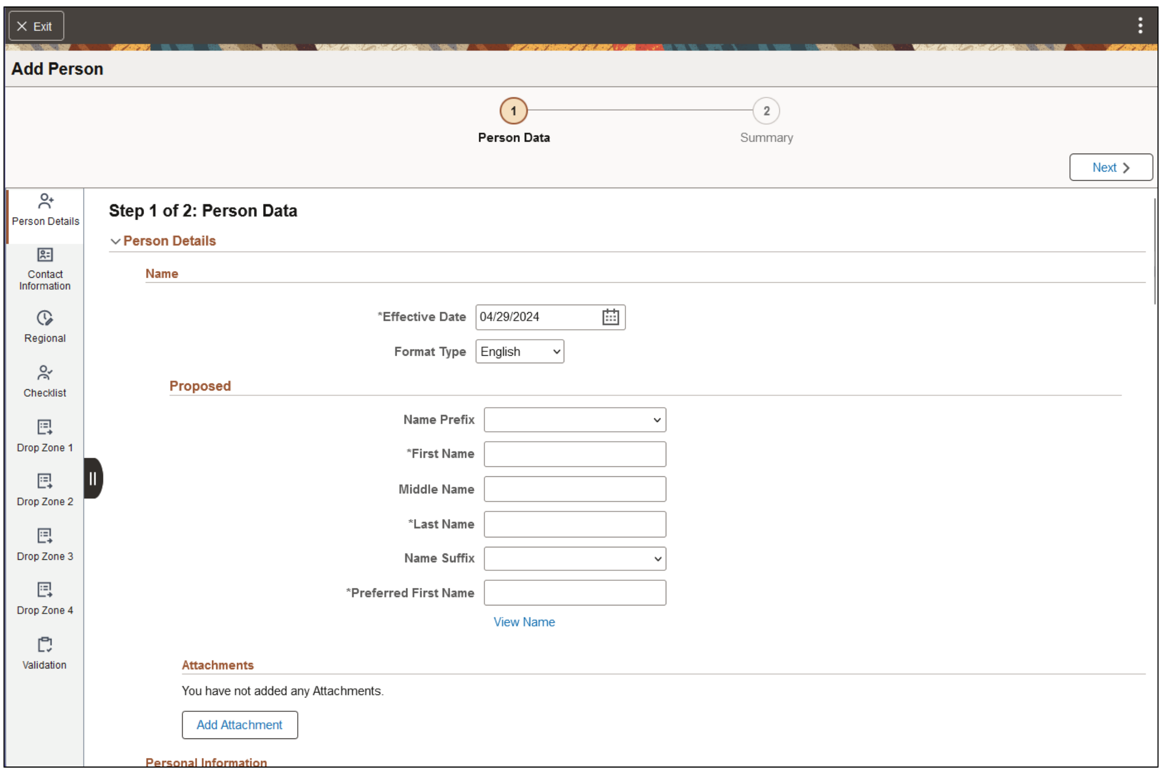
Person Data Page

Use the Person Data page (PERSONAL_DATA_FL) to enter personal details, contact information, and regional information about a person in fluid.

Navigation:

- Select the **Continue** button for a person from the Request Details Page.
- Select one of the following buttons from the Add Person Page or Create <Organizational Relationship> pages (Create Employee Page, Create Contingent Worker Page, or Create Person of Interest Page) when the **Empl ID** and **Empl Record** fields are hidden.
  - **Search** (when search match is not used)
  - **Add Person**
  - **Create Employee**
  - **Create Contingent Worker**
  - **Create Person of Interest**

This example illustrates the Person Data layout in Fluid.



Use the Section Navigator panel on the left or the horizontal scroll to navigate through the different sections of this page.

- Person Data Page - Person Details Section
- Person Data Page - Contact Information Section
- Person Data Page - Regional Section
- Person Data Page - CheckList Section
- Person Data Page - Validation Section

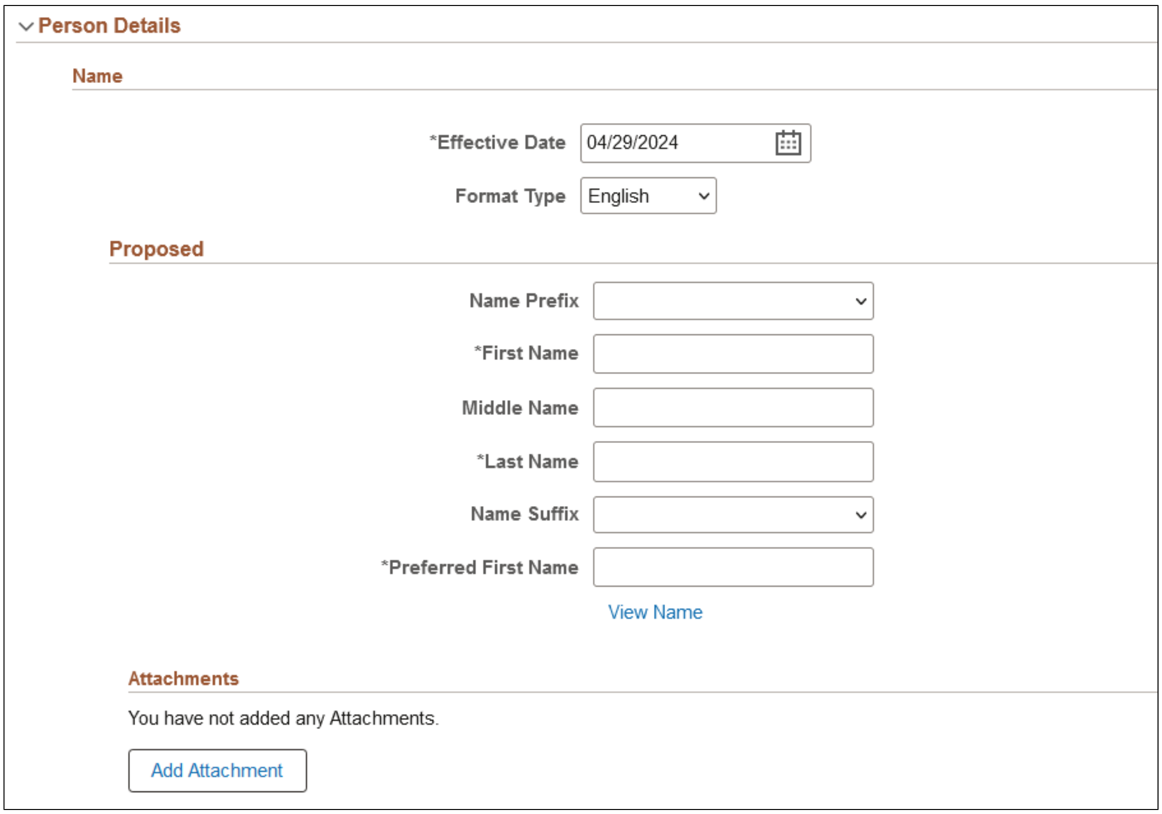
Person Data Page - Person Details Section

Use the Person Details section of the Person Data page (PERSONAL_DATA_FL) to enter name and other biographical information.

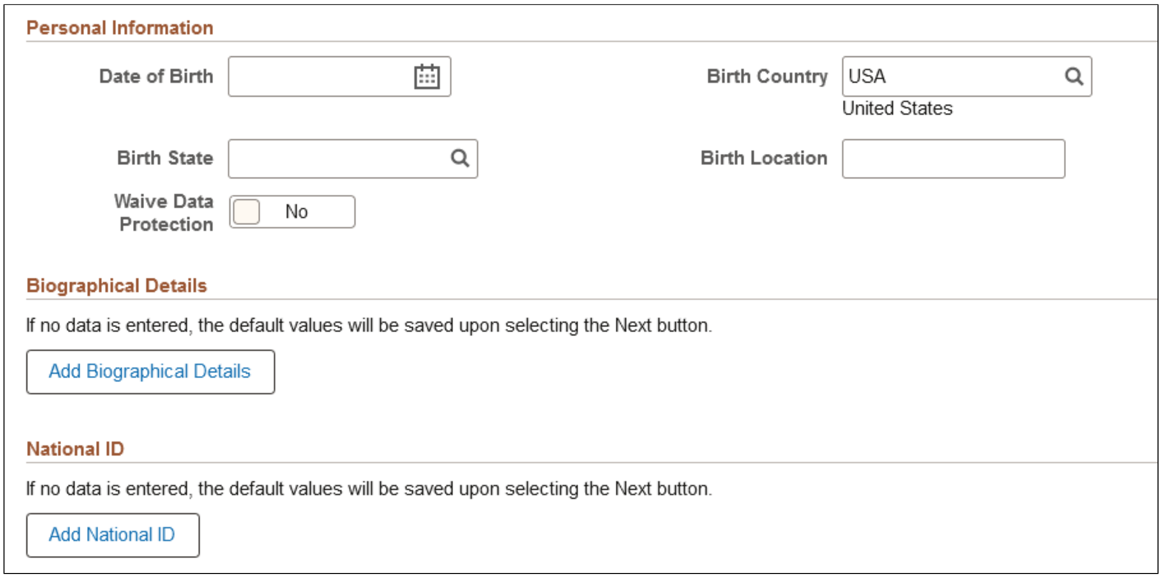
Navigation:

Navigate to the **Person Details** section on the Person Data Page in fluid.

This example illustrates the Person Details section of the Person Data page (1 of 2).



This example illustrates the Person Details section of the Person Data page (2 of 2).



Name

Use this subsection to enter information about a person's name.

Note: The name fields and the layout of the Name section is determined by the Name Format Type configuration (see “Setting Up Additional Name Information” (Application Fundamentals)). Therefore, if you change the name format type, the fields listed may change.

If you entered a person's name on the Add Person Page, the page will auto populate the corresponding name fields with that information, but you can overwrite those here.

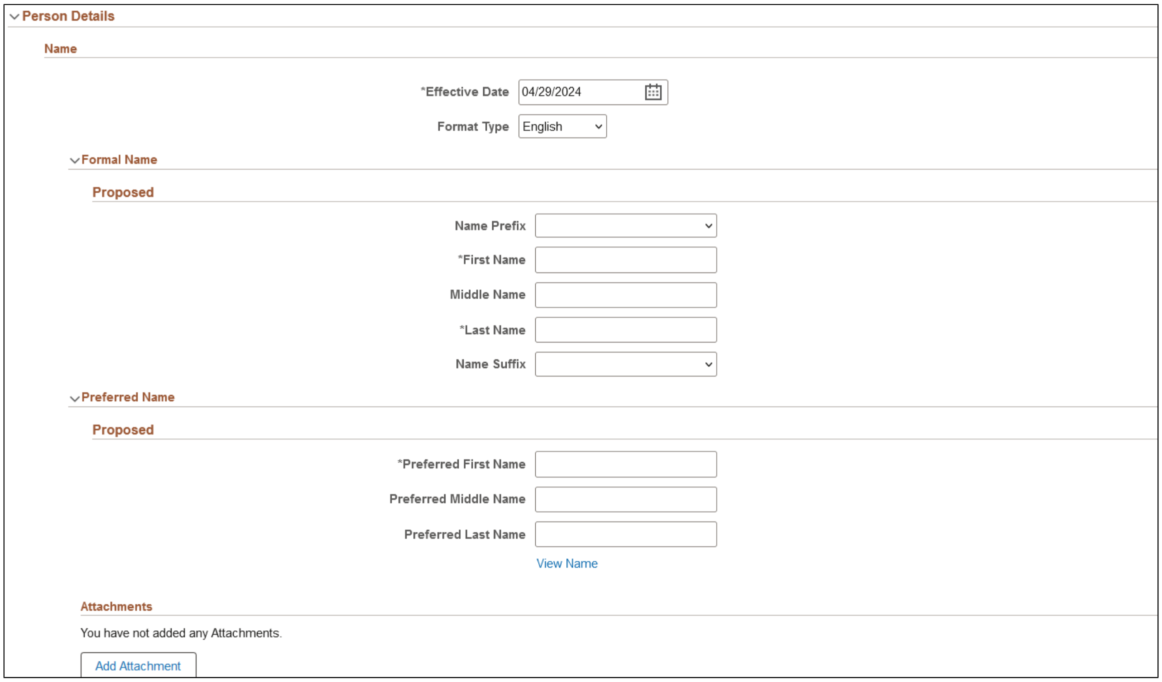
Field or Control	***Description***
Format Type	Select the name format. This value controls the name field and layout configuration in the name section.
View Name link	Select to view how the pages and reports will show the display, formal, and full name throughout the system.

Using Formal and Display Name Groups

As delivered, the page displays the person's formal name (the legal name that will be used for official purposes) and the display name (the person's preferred or chosen name and the name that will appear on many of the transaction pages throughout the system). Select the **View Name** link to view those values.

When Use Formal and Display Name Groups functionality is enabled on the Name Format Types - “Name Format Type Page” (Application Fundamentals), the Name section will show the formal and display field names by sections.

This example illustrates the Person Details section of the Person Data page when Use Formal and Display Name Groups is enabled for the format name type.

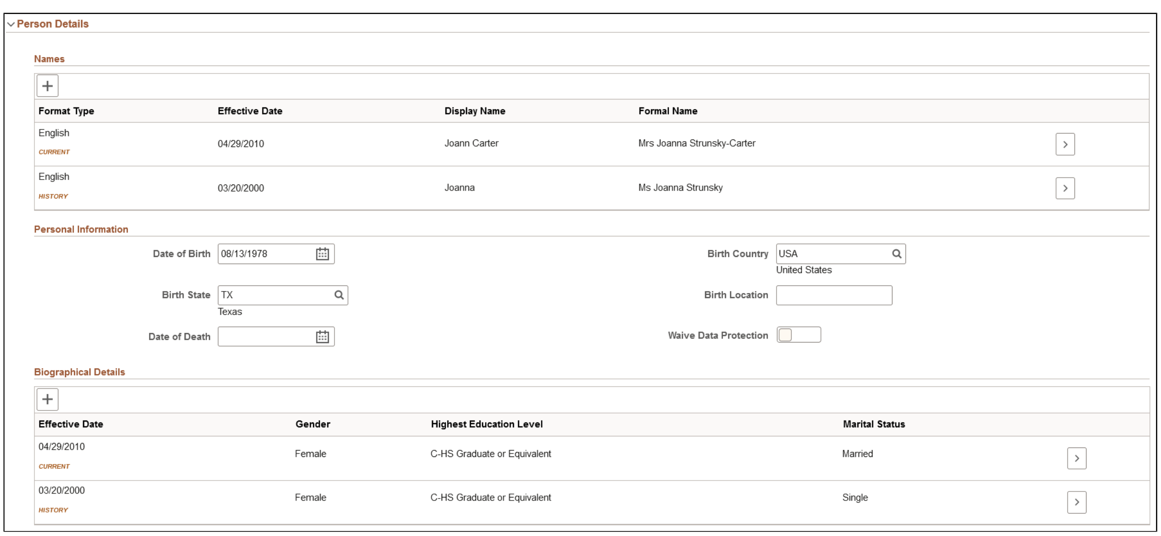


For more information on page field configuration and Formal and Display Name Groups, see the documentation for "Setting Up Additional Name Information" (Application Fundamentals), Name Format Types component.

Modifying an existing Person Data record

When you are modifying a person, this section displays a grid showing historical rows. Select the Add (+) button to enter a new name row, or the View (>) button to edit or delete a name row using the Name Page.

This example illustrates the Person Details section of the Person Data page when you are modifying a person.



Note: You cannot delete the initial name row.

(Name) Attachments

The Attachment subsection is available when the **Name** check box is selected in the **Person Data** section on the Person and Job Installation - Person and Organization Page.

Use the **Attachments** subsection to provide additional documentation to support a person's name.

Field or Control	*Description*
Add Attachment button	Select this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, select **Done** to return to this page.
Attachments link and **Description**	Displays the uploaded file as an active link in the **Attachments** field. Enter a description of the file. The page will also display who uploaded the file and the date and time it was uploaded.

The following video provides an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

Personal Information

Field or Control	*Description*
Date of Birth	If you entered a **Date of Birth** value on the Add Person Page, the page will auto populate this field with that information, but you can overwrite it here. Enter the person's date of birth. If you leave this field blank, a warning message appears during the validation process. **Note:** Although the birth date isn't required for the Administer Workforce business process, the system uses it to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.
Birth Country	Select a country. Based on the selected country, the system might display additional fields, such as **Birth State**, **Province**, **County**, **Prefecture**, and so forth.
Birth Location	Enter a birth location, usually a city, town, or village. (BRA) If the selected birth country is *BRA* (Brazil), this field becomes a prompt field for cities.

Field or Control	***Description***
Date of Death	This field does not appear during the hiring process. Use this field when updating a person's records.
Waive Data Protection	European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Swipe to *Yes* if you obtain the employee's consent to share personal data with users in other European Union member nations.

Biographic Details

Field or Control	***Description***
Add Biographical Details or button	Select to access the Biographical Details Page and add details about a person's education level, marital status, gender and orientation details, and add supporting attachments. If you do not enter biographical details, the system will save the default values of unknown or not indicated for this person when you move to the next page in the activity guide process.
Effective Date, **Gender**, **Highest Education Level**, and **Marital Status**	These fields appears when **Enable Gender Identity** is deselected on the Installation Table - “HCM Options Page” (Application Fundamentals)and you have added information on the Biographical Details page.
Effective Date, **Current Sex**, **Pronoun**, **Gender Identity**, **Highest Education Level**, and **Marital Status**	These fields appears when **Enable Gender Identity** is selected on the Installation Table - “HCM Options Page” (Application Fundamentals)and you have added information on the Biographical Details page.
(View Biographical Details) button	This button is available when you have added information on the Biographical Details page. Select to access the Biographical Details page and view further details or make changes.

National ID

Field or Control	***Description***
Add National ID or + button	Select to open the National ID Page and enter details about the national identification number. If you do not enter nation ID information, the system will save the default values for this person when you select **Next** and move to the next page.
Country, **National ID Type**, **National ID**, and **Primary ID**	Displays these fields when you have added information on the National ID page.
> (View National ID) button	This button is available when you have added information on the National ID page. Select to access the National ID page and view further details or make changes.

Name Page

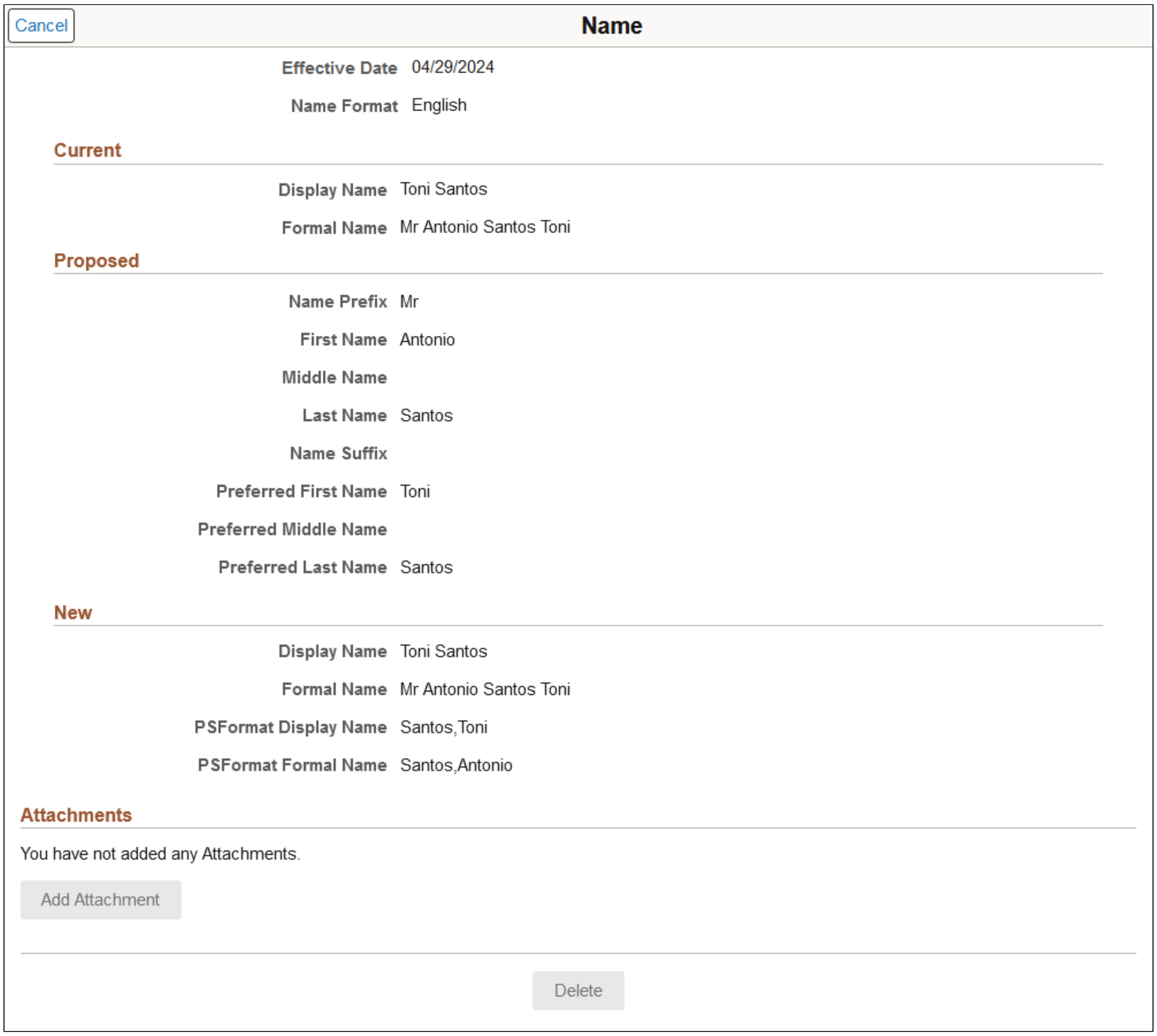
Use the Name page (HR_NM_EDIT_SCF) to enter name change information and view or add attachments to support the change.

Note: This page is available when you are modifying a person's data.

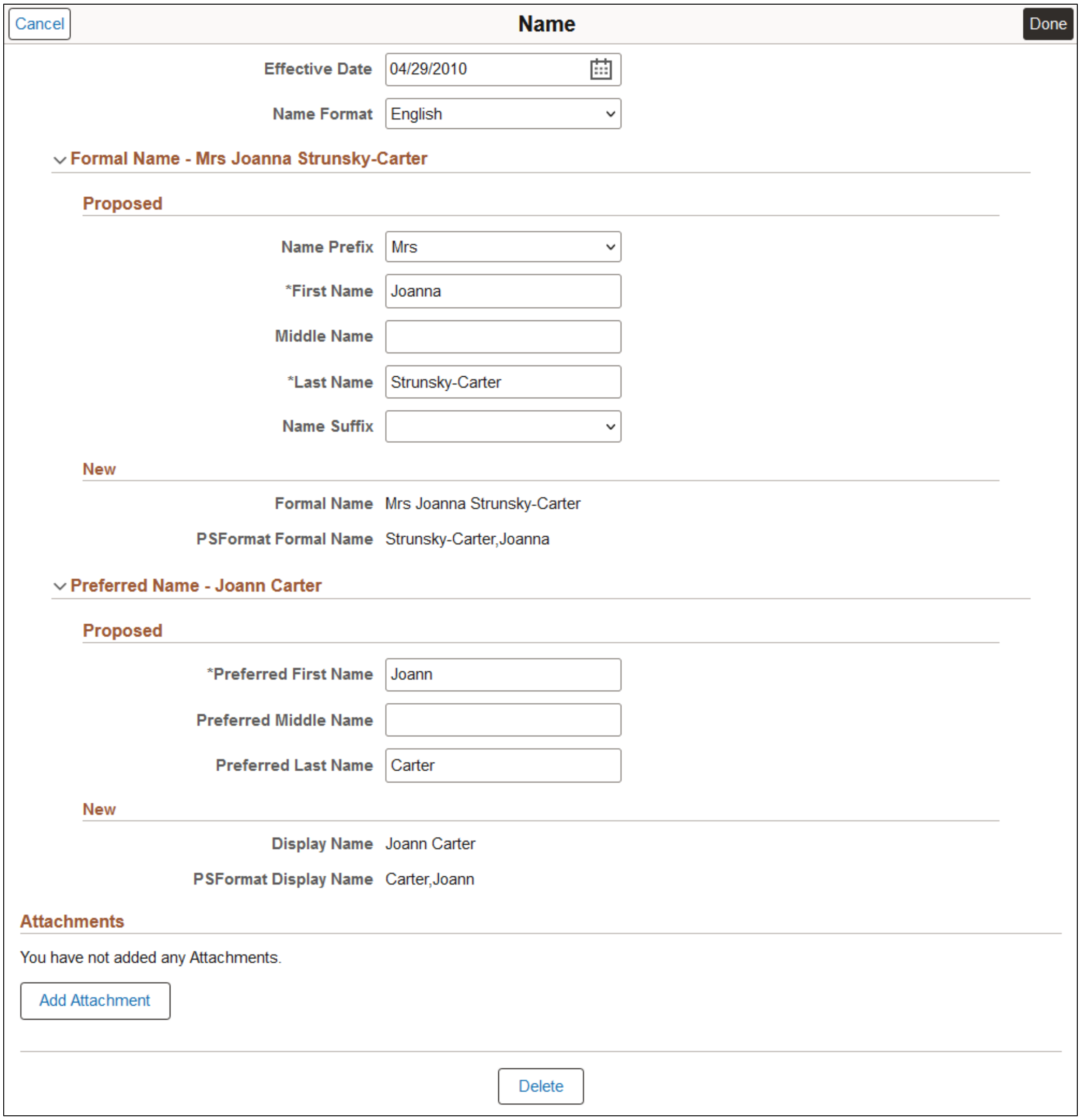
Navigation:

Select to add (+) or view (>) a name row in the Names sub-section of the Person Data Page - Person Details Section of this activity guide.

This example illustrates the Name page.



This example illustrates the Name page when Use Formal and Display Name Groups is enabled for the name format type.



The fields on this page vary depending on the value in the **Name Format** field.

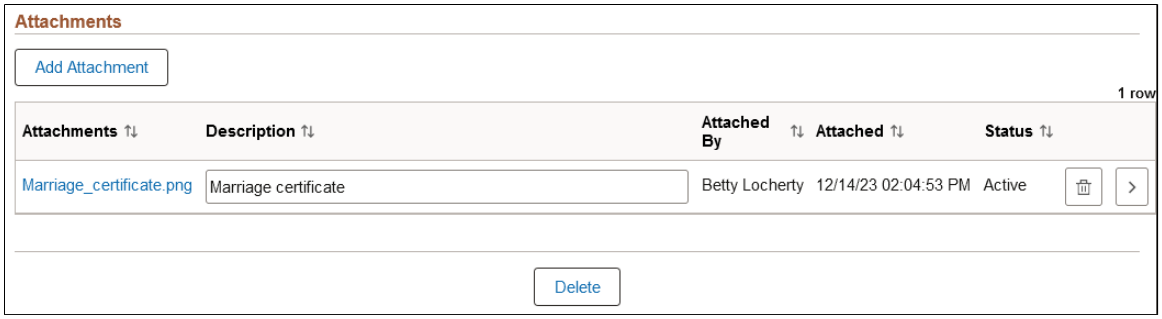
For more information on page field configuration and Formal and Display Name Groups, see the documentation for “Setting Up Additional Name Information” (Application Fundamentals), Name Format Types component.

Attachments

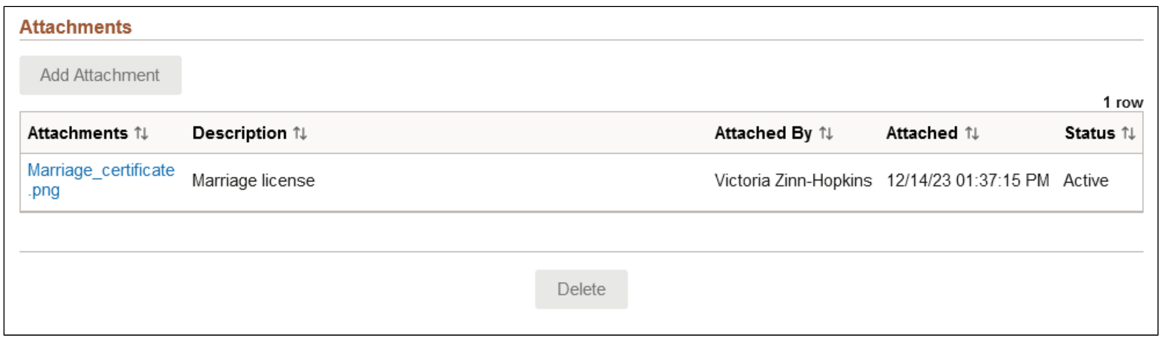
This subsection is available when the **Name** check box is selected in the **Person Data** section on the Person and Job Installation - Person and Organization Page.

Use this section to manage attachments by uploading, deleting, or updating attachments.

This example illustrates the Attachments section of the Name page when the administrator adds an attachment.



This example illustrates the Attachments section of the Name page when the employee uploads an attachment from self service.



Field or Control	***Description***
Add Attachment	Select this button to access the File Attachment page and upload files. This button is not available when viewing an attachment that was uploaded by the employee on the “Name (Detail) Page” (PeopleSoft eProfile) in self service unless in Correct History mode.
Attachments	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving the page, which you can overwrite.
Delete icon button	Select this button to remove an attachment from the Name page. This button is not available when viewing an attachment that was uploaded by the employee on the “Name (Detail) Page” (PeopleSoft eProfile) in self service unless in Correct History mode.

The following video provides an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

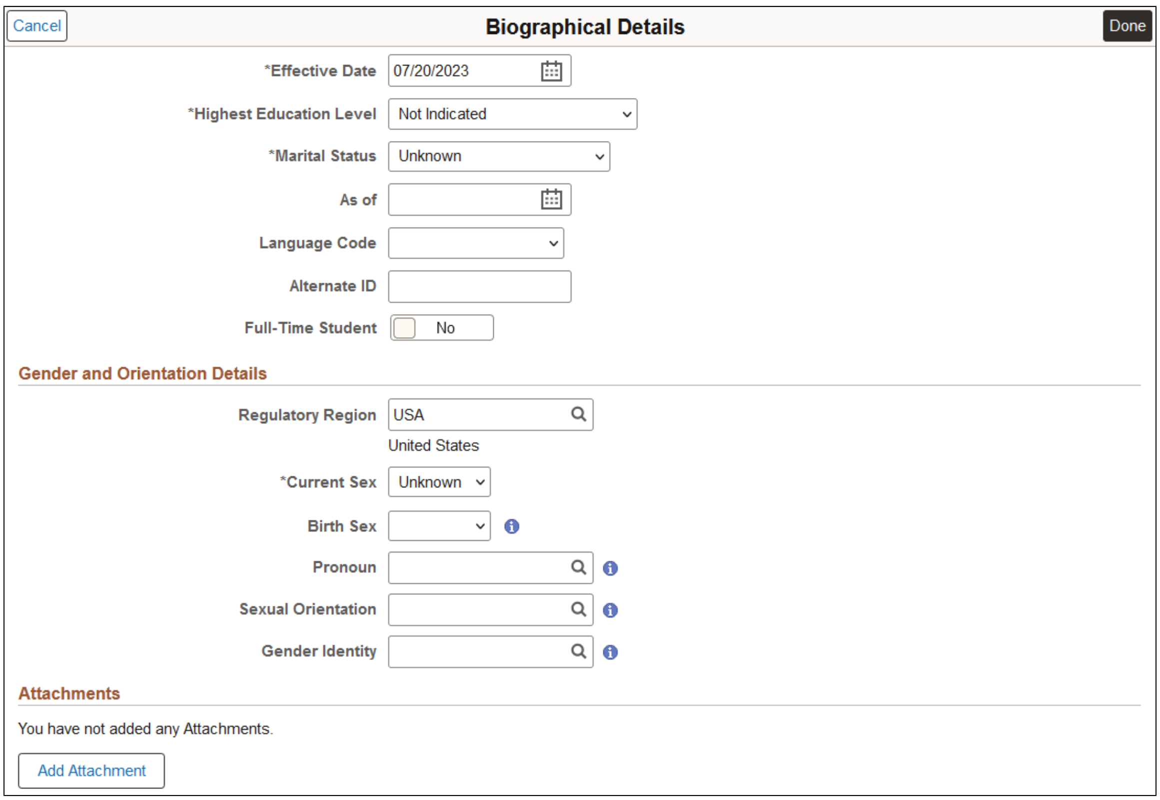
Biographical Details Page

Use the Biographical Details page (HR_BIO_PD_SCF) to record details about a person's education level, marital status, gender and orientation details, and add supporting attachments.

Navigation:

Select the **Add Biographical Details**, + add, or the View Biographical Details (>) button on the Person Data Page - Person Details Section.

This example illustrates the Biographical Details page.



When you are adding a person for the first time, the effective date must be equal to the current name effective date.

Field or Control	***Description***
Highest Education Level	Select the person's highest level of education. **Note:** (JPN) For Japanese education-level age-related pay calculations, a form of seniority pay, these values are linked to an education-level age basis as of hire.

Field or Control	***Description***
Marital Status and **As of**	Select the person's marital status. Values are: *Civil Partner, Common Law, DissDeclLost Civil Partner, Dissolved Civil Partnership, Divorced, Head of Household, Married, Separated, Single, Surviving Civil Partner, Unknown,* and *Widowed*. Enter the effective of date for this marital status in the **As of** field. PeopleSoft Payroll doesn't use the marital status that is entered on this page for tax calculations. For U.S. employees, you enter that information in Maintain Payroll Data on the Federal, State, and Local Tax pages. Taxes for Canadian employees are based on net claim amount, which varies depending on the employee status. **Note:** Laws in the Netherlands require tracking effective-dated marital status information for employees.
Language Code	Select the person's native or preferred language. Although tracking official or preferred languages is required in some countries in PeopleSoft Human Resources, the system also uses the preferred language when you communicate with people with a relationship to the organization. For example, PeopleSoft Global Payroll for Germany and Switzerland use the language code to print paychecks in the payee's preferred language. Other types of communication also use this as the default language for written communication. **Note:** Don't use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages. Use the Location Table to track the organization's official language. Use the Languages table to record a worker's language proficiency. The Language Code field prompts from the LANG_CD table, which concerns the person's native or preferred language, and not from the LANGUAGE_CD table, which contains the languages into which the application can be translated.
Alternate ID	Use this field to record a second type of ID for a person.
Full-Time Student	Set to *Yes* if the person is a full-time student.
Gender	This field appears in this section when **Enable Gender Identity** is not enabled on the Installation Table. When this feature is enabled, the page will display the **Gender and Orientation Details** section where you will record gender information. Select the person’s gender. By default, the value is set to *Unknown*. **Note:** (BRA) You must specify the person’s gender (*Male* or *Female*) for eSocial reporting to work properly.

Gender and Orientation Details

Note: This section appears when **Enable Gender Identity** is selected on the Installation Table **-** “HCM Options Page” (Application Fundamentals). This allows administrators and employees to track gender identity details in Personal Data. This functionality is delivered turned off.

When you or a manager approves a gender update from an employee, the system will insert a new **Biographical Details** effective dated row. However, if you do not allow the employee to update and submit gender details, you need to insert a new effective dated row here to retain historical information. See also “Pending Approvals - Gender Identity Change Page” (PeopleSoft eProfile Manager Desktop).

Gender details are specific to an individual and a person can choose to identify all gender details or just a few. Employees can update their own details on the fluid self service Personal Details **-** “Gender Details Page” (PeopleSoft eProfile) when they have been assigned the *Fluid Dashboard - Person Dtls* role and granted access to update the fields. Employees must also be part of a regulatory region that is configured for gender identity (see configuration on the “Gender Details Page” (Application Fundamentals)).

Note: Unless otherwise noted, the values for these fields are defined on the setup “Gender Details Page” (Application Fundamentals).

Field or Control	***Description***
Regulatory Region	Enter a region that is configured for gender identification. The valid values for the remaining fields are based on the regulatory region you enter here. **Important!** The regulatory region for gender details should align with the regulatory region assigned to a person's primary job on the Work Location Page. The employee self service “Gender Identity Page” (PeopleSoft eProfile) and “Gender Details Page” (PeopleSoft eProfile) use the regulatory region from Job Data to manage gender details. If this region varies from that in Job Data, the Gender Identity page will display the current information from this section. However, the employee will not be able to edit information that is tied to a regulatory region different from that stored in Job Data. Instead, the page will display an + (Add) button for the employee to enter gender details using the regulatory region associated with the employee's primary job.

Field or Control	***Description***
Current Sex (label name may vary)	This is the only required field in the **Gender and Orientation Details** section. Select the person’s current sex. By default, the value is set to *Unknown*. Valid values come from the translate table and are not tied to region. **Note:** This field label is configurable on the “Gender Configuration Page” (Application Fundamentals). **Current Sex** is the new label delivered by default, but this value can also be overwritten.
<gender field label> Information icon	Select this icon to access the <Gender Field Label> Values Page and view descriptions of values for gender-related fields. This displays the values entered by region on the configuration “Gender Details Page” (Application Fundamentals).
Birth Sex	Enter the sex assigned at birth.
Pronoun	Select the pronouns this person prefers to be called. **Note:** When you enter this information, and the system is configured to show pronouns, the pronouns will display next to the employee's name on the Company Directory - Profile pages in fluid (see Using the PeopleSoft Fluid User Interface for the Company Directory). To configure the Company Directory to display pronouns in fluid, see the Chart and Profile Settings - Profile Content Page.
Sexual Orientation	Enter this individuals inherent attraction to a sexual partner of a certain gender.
Gender Identity	Enter the person's inner sense or self perception of being male, female, a blend of both or neither. One's gender identity can be the same or different from their sex assigned at birth or current sex.

These videos provide an overview of the gender identity functionality:

Video: Image Highlights, PeoleSoft HCM Update Image 41: Gender Identity and Expression

Video: PeopleSoft Gender Identity and Expression

Considerations when Entering Gender and Orientation Details

Since gender information is driven by region and an administrator's security access, there are situations that will impact what gender fields you can access.

Assuming all setup has been done to support recording gender details, consider the following scenarios in regards to the regulatory region assigned to the employee on the Job Data - Work Location Page and your security access:

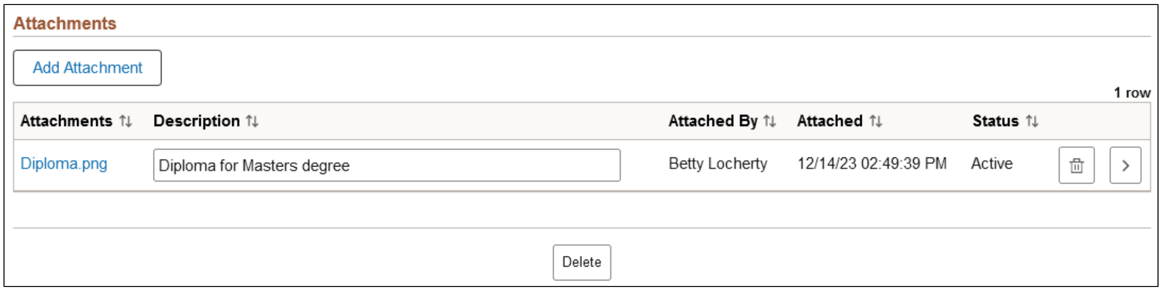
- You have row level and global security access to a region configured for gender identification (for example, *USA*). You can:
  - Search for employees in the *USA* regulatory region.
  - See and select *USA* as a regulatory region within Biographical History: Gender and Orientation Details section of Personal Data.
  - See the gender identity fields for the *USA* region.
  - See the modified **Gender** label as **Current Sex**, if applicable.
- You have row level and global security access to a region configured for gender identification and one not configured for gender identification (for example, *USA* and *MYS* respectively). You can:
  - Search for employees in the *USA* and *MYS* regions.
  - See the gender identity fields for *USA* employees and see the modified **Gender** label as **Current Sex**, if applicable.
  - NOT see the gender identity fields for *MYS* employees, or see the modified **Gender** label as **Current Sex**, if configured as such.
- You have row level security for *USA* (which is configured for gender identification) and *MYS* (which is not configured for gender identification), but you have global security for *MYS* only. You can:
  - Search for employees in the *USA* and *MYS* regions.
  - NOT see the gender identity fields for *USA* employees in person data, or see the modified **Gender** label as **Current Sex**, due to global security.
  - NOT see the gender identity fields for *MYS* employees in personal data, or see the modified **Gender** label as **Current Sex**, due to *MYS* not being a gender configured region.

(Biographical Details) Attachments

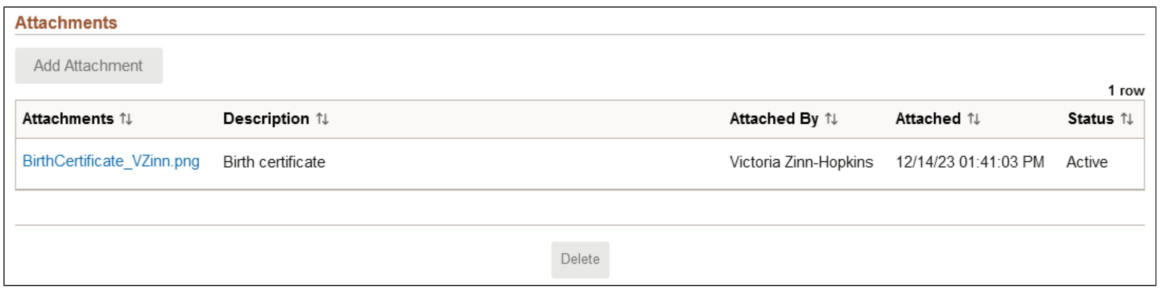
This section is available when the **Biographical** check box is selected in the **Person Data** section on the Person and Job Installation - Person and Organization Page.

Use the **Attachments** section to provide additional documentation to support a person's biographical information.

This example illustrates the Attachments section of the Biological Details page when the administrator adds an attachment.



This example illustrates the Attachments section of the Biological Details page when the employee uploads an attachment from self service.



Field or Control	***Description***
Add Attachment button	Select this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, select **Done** to return to this page. This button is not available when viewing an attachment that was uploaded by the employee on the "Gender Details Page" (PeopleSoft eProfile) in self service unless in Correct History mode.
Attachments link and **Description**	Displays the uploaded file as an active link in the **Attachments** field. Enter a description of the file. The page will also display who uploaded the file and the date and time it was uploaded.
Delete icon button	Select this button to remove an attachment from the Biological Details page. This button is not available when viewing an attachment that was uploaded by the employee on the "Gender Details Page" (PeopleSoft eProfile) in self service unless in Correct History mode.

<Gender Field Label> Values Page

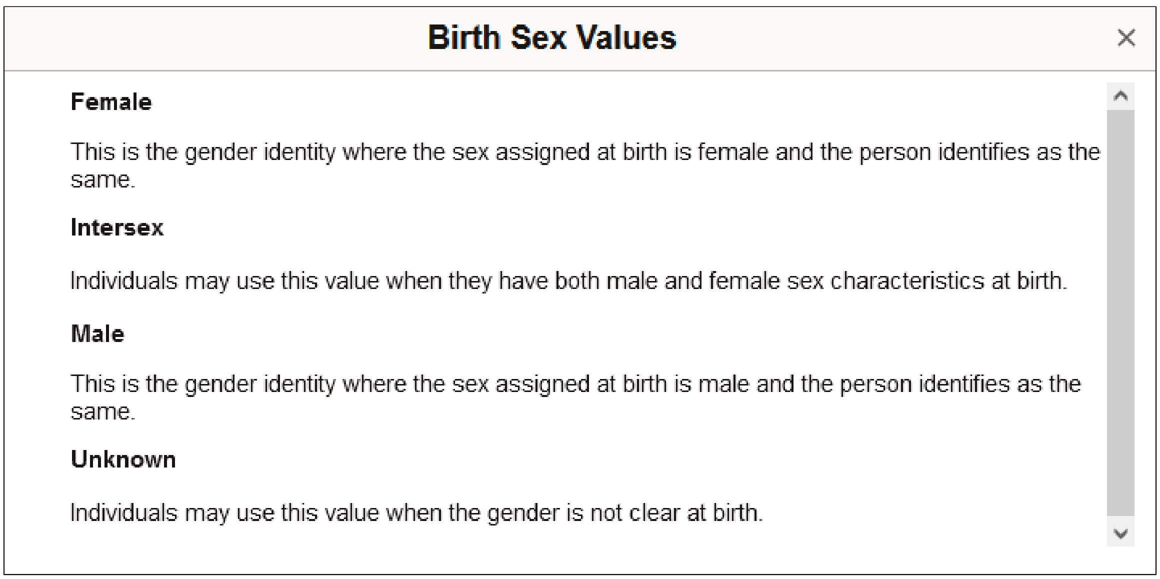
Use the <Gender Field Label> Values page (HR_GENDER_DTL_SCF) to view gender field value descriptions.

Note: The page title and information correlates to the gender field label, such as Birth Sex Values page or Pronoun Values page.

Navigation:

Select the (Information) icon for a gender field on the Biographical Details Page.

This example illustrates the Birth Sex Values page. Other <Gender Field Label> Values pages display similar information.



Page content will vary by gender field type and the configuration of the "Gender Details Page" (Application Fundamentals) for the region.

National ID Page

Use the National ID page (HR_NID_PD_SCF or HR_NID_PD_VW_SCF) to enter national ID information for a person and add supporting attachments.

Navigation:

Select the **Add National ID**, + add, or View National ID (>) button on the Person Data Page - Person Details Section.

This example illustrates the fields and controls on the National ID page.

National ID

Field or Control	***Description***
Country	Select the country that issued the worker's national ID.
National ID Type	The system enters the value that you establish for this country on the National ID Type Table page. You can override this default. Add new rows to enter one or more ID types for a person. **Note:** (BRA) Changes made to a Brazilian person's *CTPS - Work Card* and *PIS* national ID types will be recorded on the National ID History page.
National ID	Enter the worker's national ID number. The system checks the format of the entry against the default format that you enter on the National ID Type Table page. (GBR) For the U.K. the normal format of two letters followed by six digits and then one letter for National Insurance identification appears by default. Other options that are dependent on employee status are available. (GBR) When you enter a national insurance number, the system uses the NID Prefix GBR page to check that you have entered a valid national insurance prefix. You can't save this page if you have entered an invalid national insurance prefix.
Primary ID	Set to *Yes* if the national ID is the person's primary ID. If this is the only data row for this person, the system selects it as *Yes* by default. You can deselect it.

Field or Control	Description
Tax Ref	(SGP) Set to *Yes* if the worker's national registration ID is used as the person's employer tax reference number. This field is for information only.
National ID Expiry Date	(CAN) Enter the expiration date for this national ID.

Consider the following country specific national ID information:

- (CAN) Verifying Social Insurance Numbers for Canadian Employees

  Invoke a modulus 10-check digit formula to verify an employee's social insurance number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

  If you enter an employee SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

- (NLD) Verifying Social Security IDs for Dutch Employees

  The Dutch national ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates the entry for the employee's social security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

- (USA) Reporting to Government Agencies When the Social Security Number Is Unknown

  When the social security number (SSN) is missing, the system enters the default number that is defined on the National ID Type table, usually all 9s. However, reports and files that are created by PeopleSoft Payroll for North America for submission to government agencies, such as the IRS or Social Security Administration, convert missing or unknown SSNs to the specific format that is required by the government agency. For example, a missing or unknown SSN is reported to the IRS using all zeros on the W-2 file.

(National ID) Attachments

This section is available when the **National ID** check box is selected in the **Person Data** section on the Person and Job Installation - Person and Organization Page.

Use the **Attachments** section to provide additional documentation to support a person's national ID information.

Field or Control	Description
Add Attachment button	Select this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, select **Done** to return to this page.

Field or Control	Description
Attachments link and **Description**	Displays the uploaded file as an active link in the **Attachments** field. Enter a description of the file. The page will also display who uploaded the file and the date and time it was uploaded.

Person Data Page - Contact Information Section

Use the Contact Information section of the Person Data page (PERSONAL_DATA_FL) to enter or edit a person's contact information.

Navigation:

Navigate to the **Contact Information** section on the Person Data Page in fluid.

This example illustrates the Contact Information section of the Person Data page.

Use this section to enter or view address, phone, and email information for the person. After you have added these details, the corresponding subsection will display a grid showing a summary of the information.

Addresses

Field or Control	***Description***
Display History	This option is available when you access and existing record from the Modify Person Tile or access and existing person record. Set to *Yes* to display all historical address rows. Set to *No* to show only the current row for each address type.
Add Address or button	Select to open the Add (or Edit) Address Page and enter address details for this person.
Address Type, **Effective Date**, and **Address**	Displays these fields when you have added information on the Address page.
(Add/Edit address) button	This button is available when you have added information on the Address page. Select to access the Edit Address page and view additional details or make changes.

Phone

Field or Control	***Description***
Add Phone or button	Select to open the Phone Number Page and enter phone numbers for this person.
Type, **Number**, **Extension**, and **Preferred**	Displays these fields when you have added information on the Phone Number page. If this is the only phone number row for this person, the system selects it as the preferred number by default. You can deselect it on the Phone Number page.
(Edit) button	This button is available when you have added information on the Phone Number page. Select to access this page and view or make changes to the number.

Email

Field or Control	***Description***
Add Email or button	Select to open the Email Address Page and enter details about an address.
Country, **National ID Type**, **National ID**, and **Primary ID**	Displays these fields when you have added information on the Email Address page. If this is the only email row for this person, the system selects it as the preferred email by default. You can deselect it on the Email Address page.
(Edit) button	This button is available when you have added information on the Email Address page. Select to access the National ID page and view or make changes.

Add (or Edit) Address Page

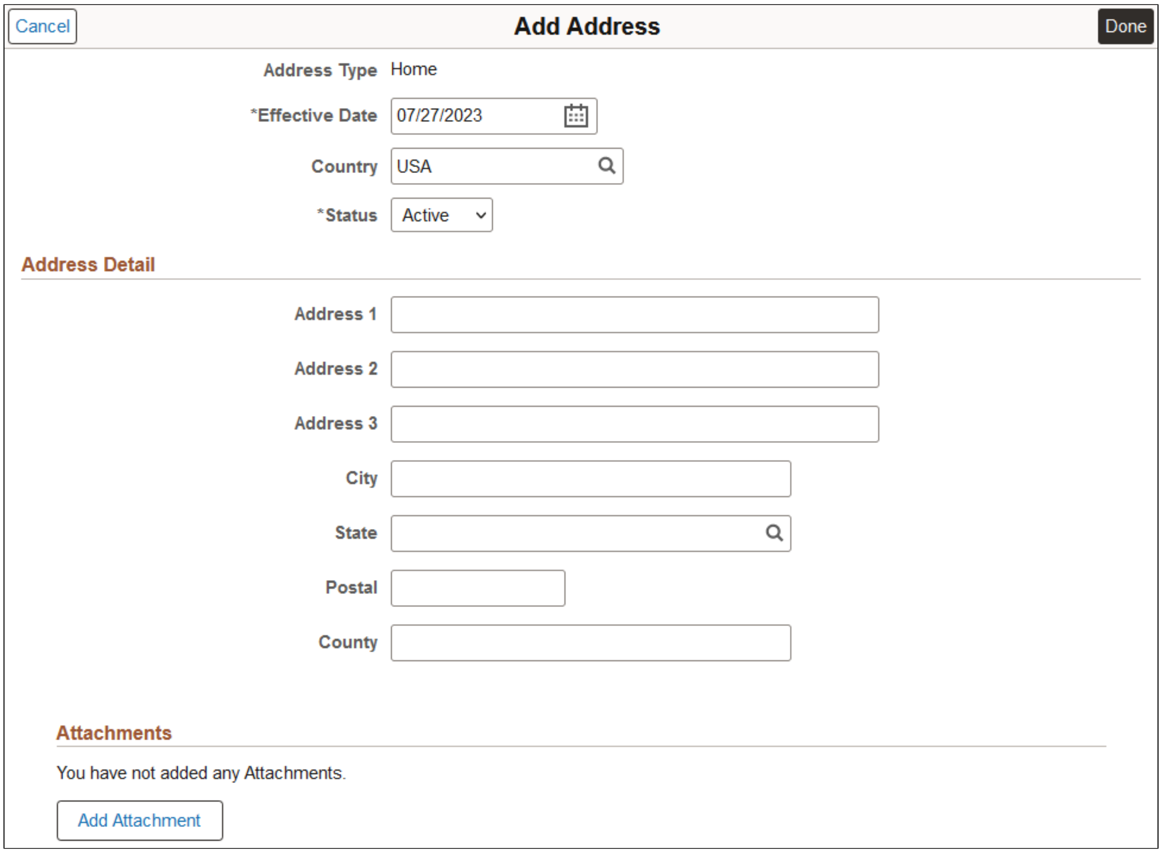
Use the Add (or Edit) Address page (HR_ADD_ADDRESS_SCF or HR_ADDRESS_SCF) to add or manage addresses for a person.

Note: This page title will also display as the **Add Another Address** or **Edit Address** page, depending on how you access the page.

Navigation:

Navigate to the **Contact Information** section on the Person Data Page in fluid and select the **Add Address** button, Add (+) button, or Add/Edit address (>) button.

This example illustrates the Add Address page.



Note: The page layout and options vary depending on the value in the **Country** field.

Field or Control	***Description***
Address Type	Select the type of address you are adding. The system automatically displays *Home* for the first address that you enter. **Note:** Payroll for North America requires the person to have one address with type *Home* to successfully calculate taxes. You must set up each Puerto Rico employee's home address with country code *USA* and state code *PR* for proper tax reporting. You can add multiple address types, such as home, mailing, or preferred.
Delete button	This button is available when you are accessing an existing address row added by the administrator.

Note: When entering certain country addresses, use the **Address Search** link in the Address Detail section of the page to locate valid cities based on other information on the page.

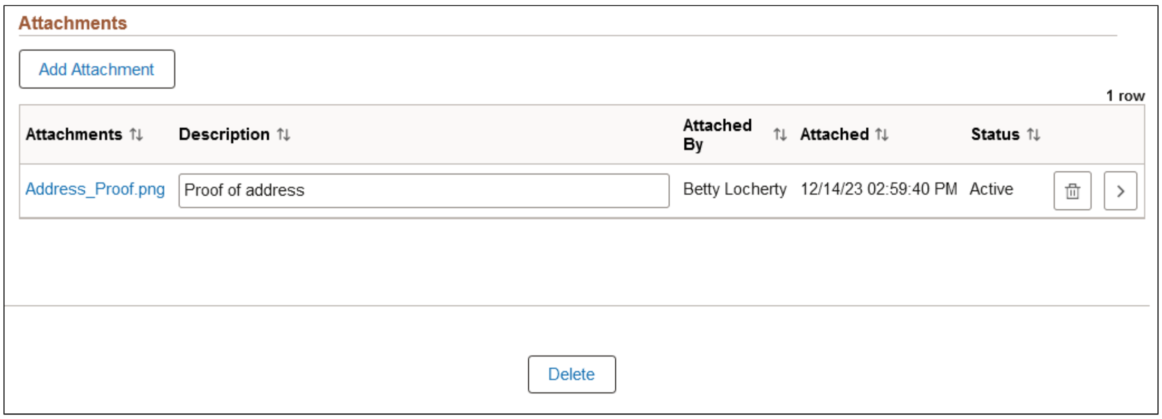
Note: Laws in Belgium, the Netherlands, and Japan require maintaining effective-dated address information for employees.

(Address) Attachments

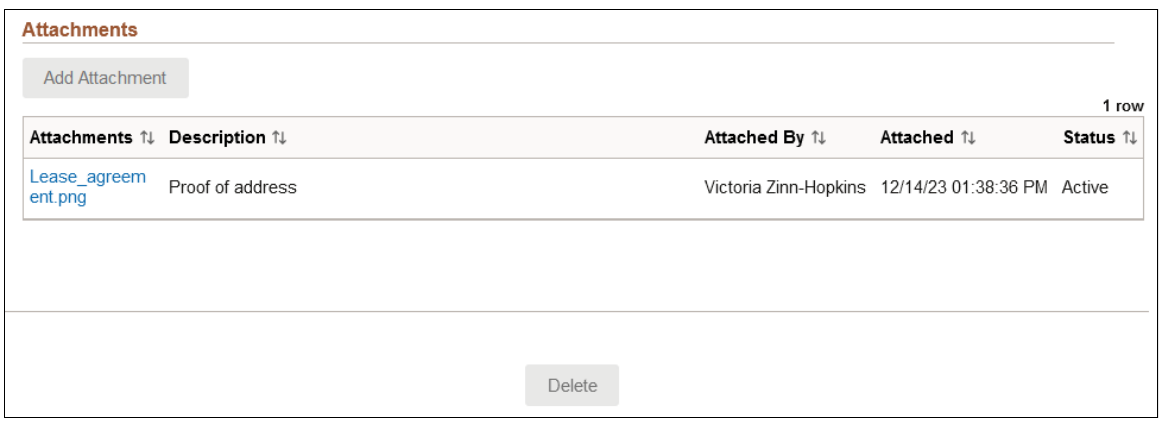
This section is available when the **Address** check box is selected in the **Person Data** section on the Person and Job Installation - Person and Organization Page.

Use the **Attachments** section to provide additional documentation to support a person's address information.

This example illustrates the Attachments section of the Address page when the administrator adds an attachment.



This example illustrates the Attachments section of the Address page when the employee uploads an attachment from self service.



Field or Control	Description
Add Attachment button	Select this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, select **Done** to return to this page. This button is not available when viewing an attachment that was uploaded by the employee on the “<Type> Address (Detail) Page” (PeopleSoft eProfile) in self service unless in Correct History mode.
Attachments link and **Description**	Displays the uploaded file as an active link in the **Attachments** field. Enter a description of the file. The page will also display who uploaded the file and the date and time it was uploaded.
Delete icon button	Select this button to remove an attachment from the Address page. This button is not available when viewing an attachment that was uploaded by the employee on the “<Type> Address (Detail) Page” (PeopleSoft eProfile) in self service unless in Correct History mode.

Related Links

“Administering Country Codes” (Application Fundamentals)

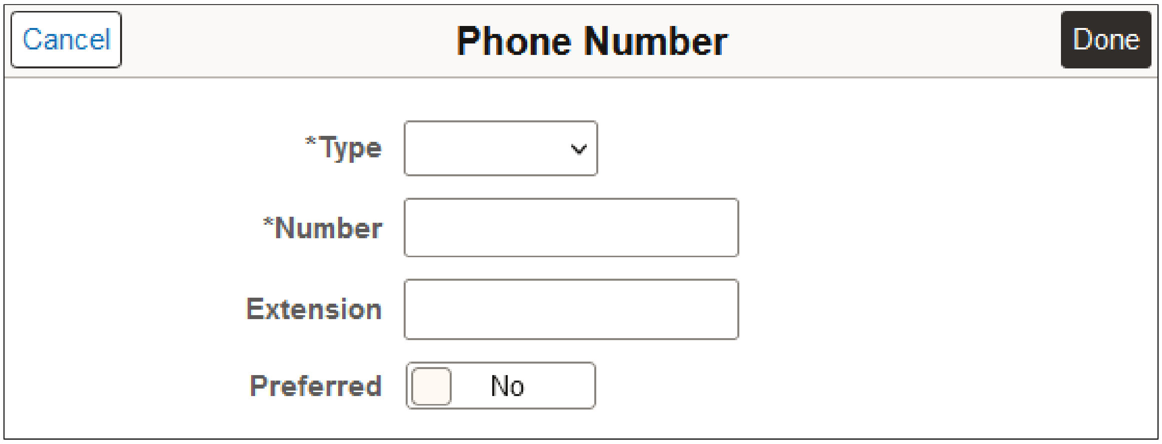
Phone Number Page

Use the Phone Number page (HR_ADD_PHONE_SCF) to enter or edit a person's phone number information.

Navigation:

Navigate to the **Contact Information** section on the Person Data Page in fluid and select the **Add Phone** button, Add (+) button, or Edit (>) button for the phone.

This example illustrates the Phone Number page.



Field or Control	***Description***
Phone Type	Select the phone type, such as *Business*, *Home*, or *Mobile*.
Number and **Extension**	Enter the phone number. The system formats the number based on the standard phone number format. For 10 digit phone numbers the format is *000/000-0000* and for 7 digit phone numbers the format is *000-0000.* The system also supports alphanumeric characters and the punctuations *$, -, /, (,* and *)* when entering telephone numbers.
Preferred	Set to *Yes* if the number is the person's primary phone contact. If this is the only data row for this person, the system selects it as *Yes* by default. You can deselect it.

Email Address Page

Use the Email Address page (HR_PERS_EMAIL_SCF) to enter or edit a person's email information.

Navigation:

Navigate to the **Contact Information** section on the Person Data Page in fluid and select the **Add Email** button, Add (+) button, or Edit (>) button for the email.

This example illustrates the Email Address page.

Field or Control	***Description***
Email Type and **Email Address**	Select an email type and enter the employee's email address.
Preferred	Set to *Yes* if it is the person's primary email contact. If this is the only data row for this person, the system selects it as *Yes* by default. You can deselect it.

Person Data Page - Regional Section

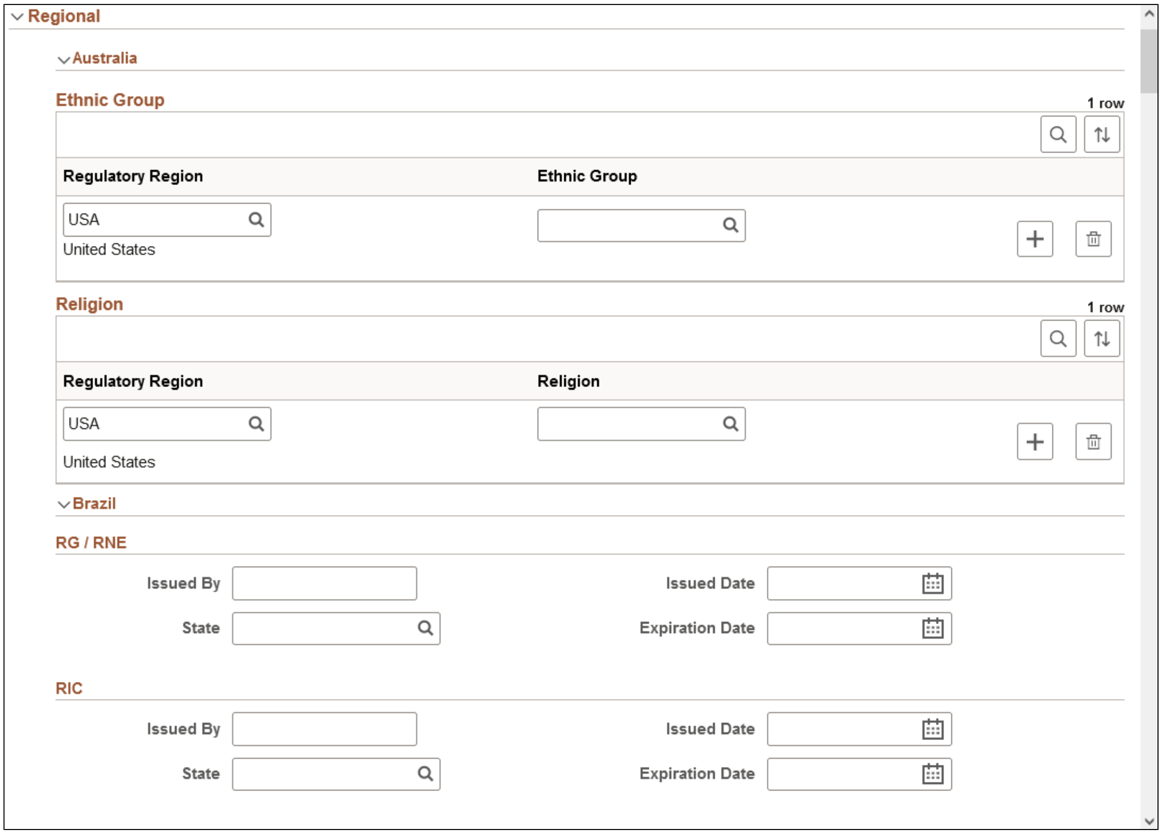
Use the Regional section of the Person Data page (PERSONAL_DATA_FL) to enter country-specific personal information.

Note: Subsections that appear within this section are controlled by user permission lists.

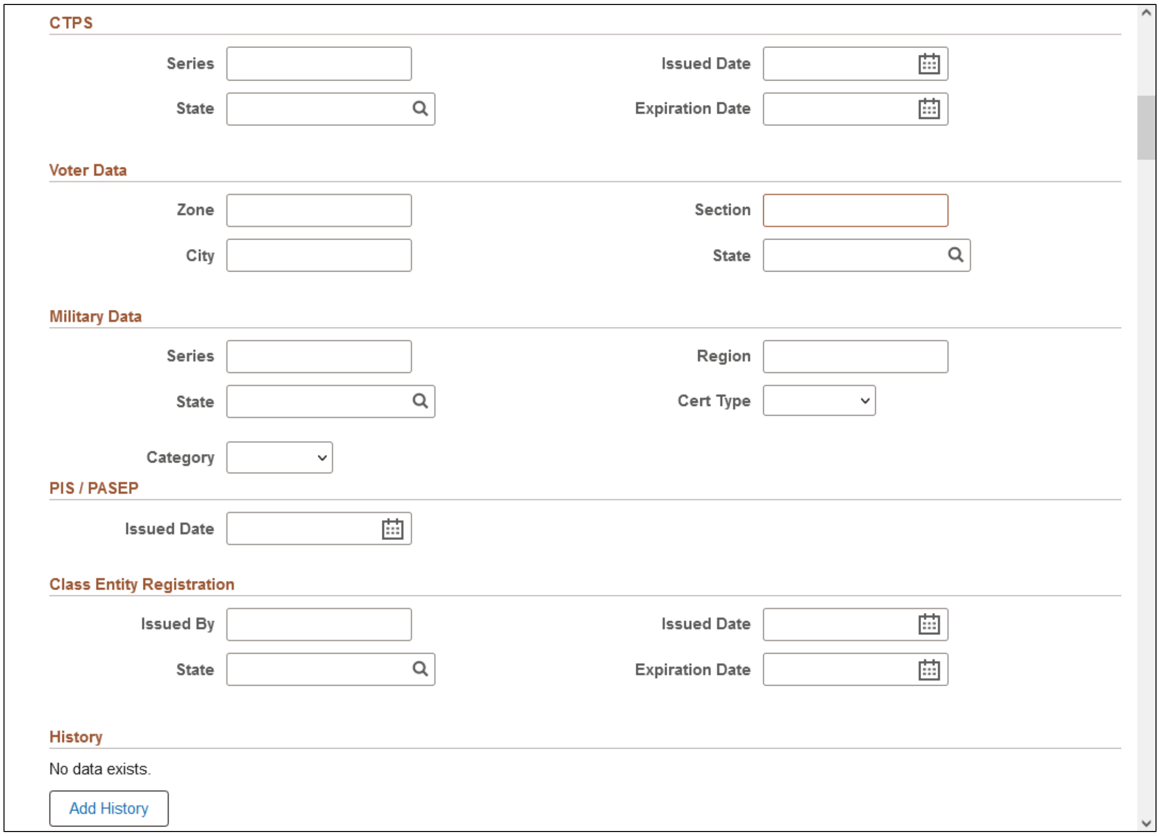
Navigation:

Navigate to the **Regional** section on the Person Data Page in fluid.

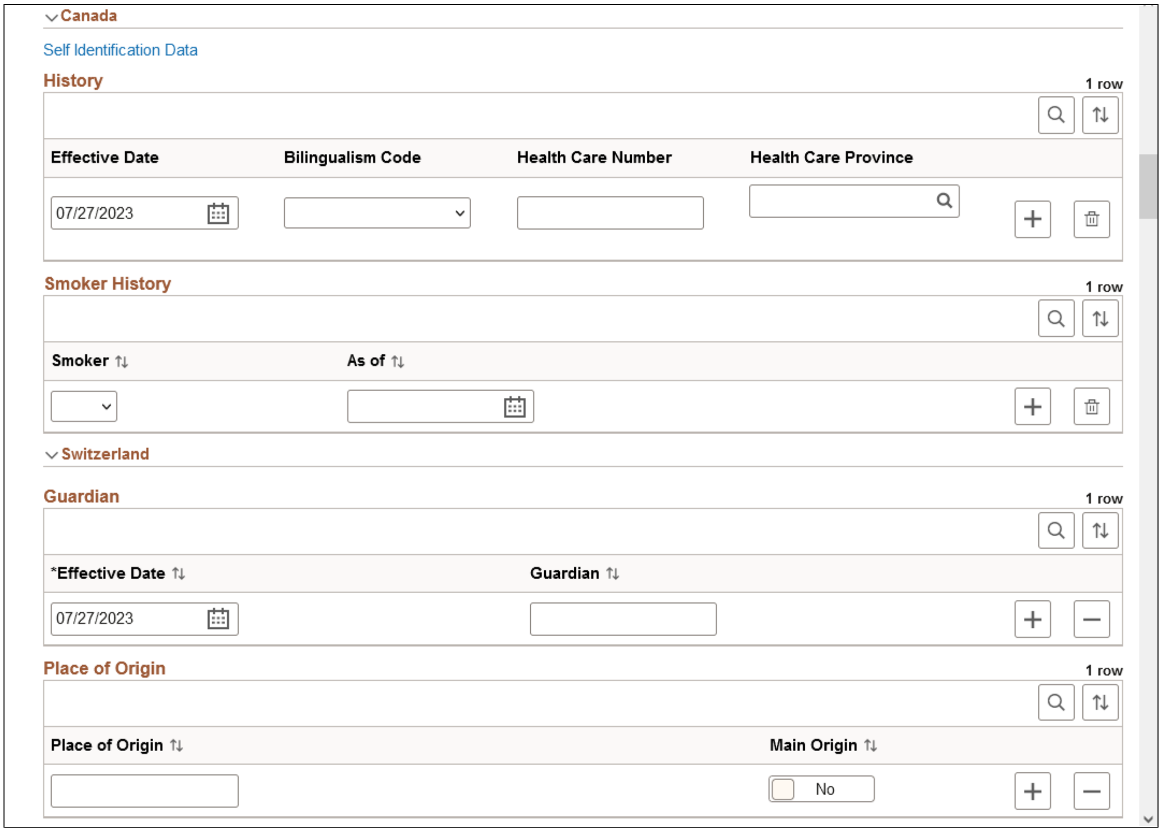
This example illustrates the Regional section of the Person Data page (1 of 12). You can find definitions for the fields and controls later on this page.



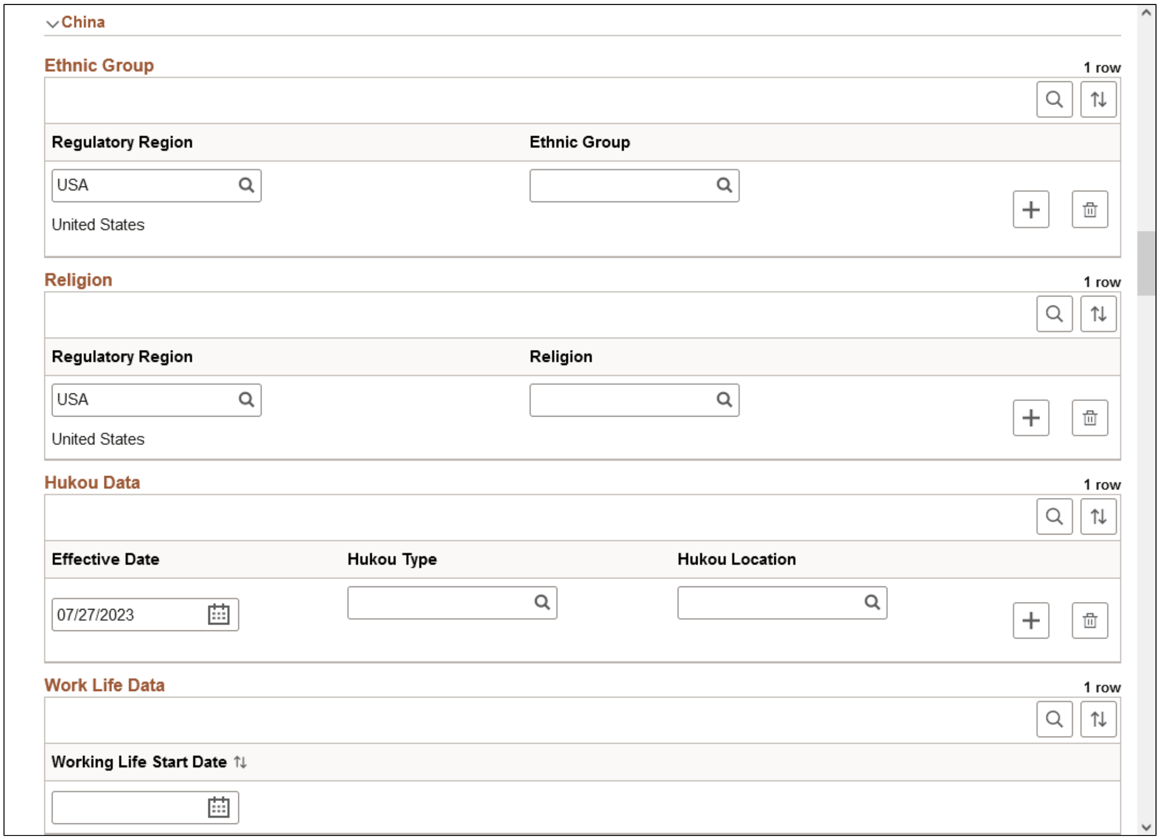
This example illustrates the Regional section of the Person Data page (2 of 12). You can find definitions for the fields and controls later on this page.



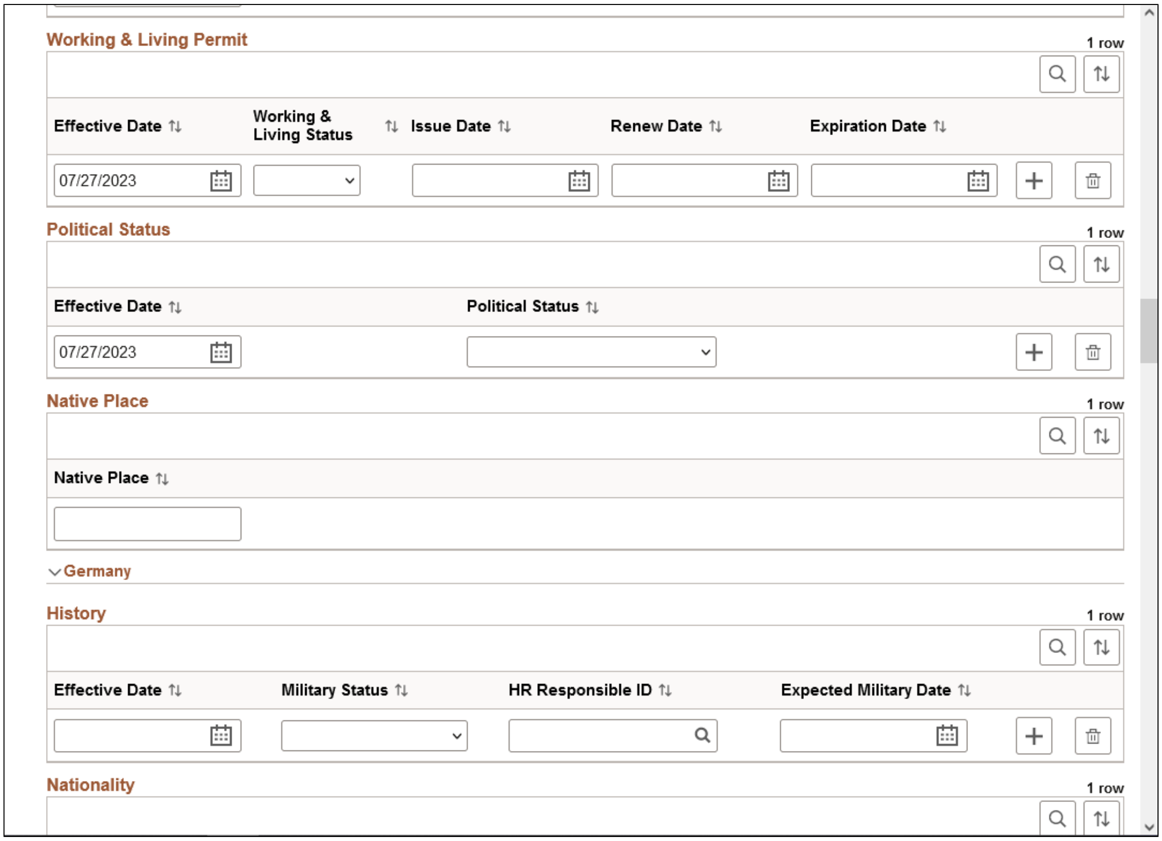
This example illustrates the Regional section of the Person Data page (3 of 12). You can find definitions for the fields and controls later on this page.



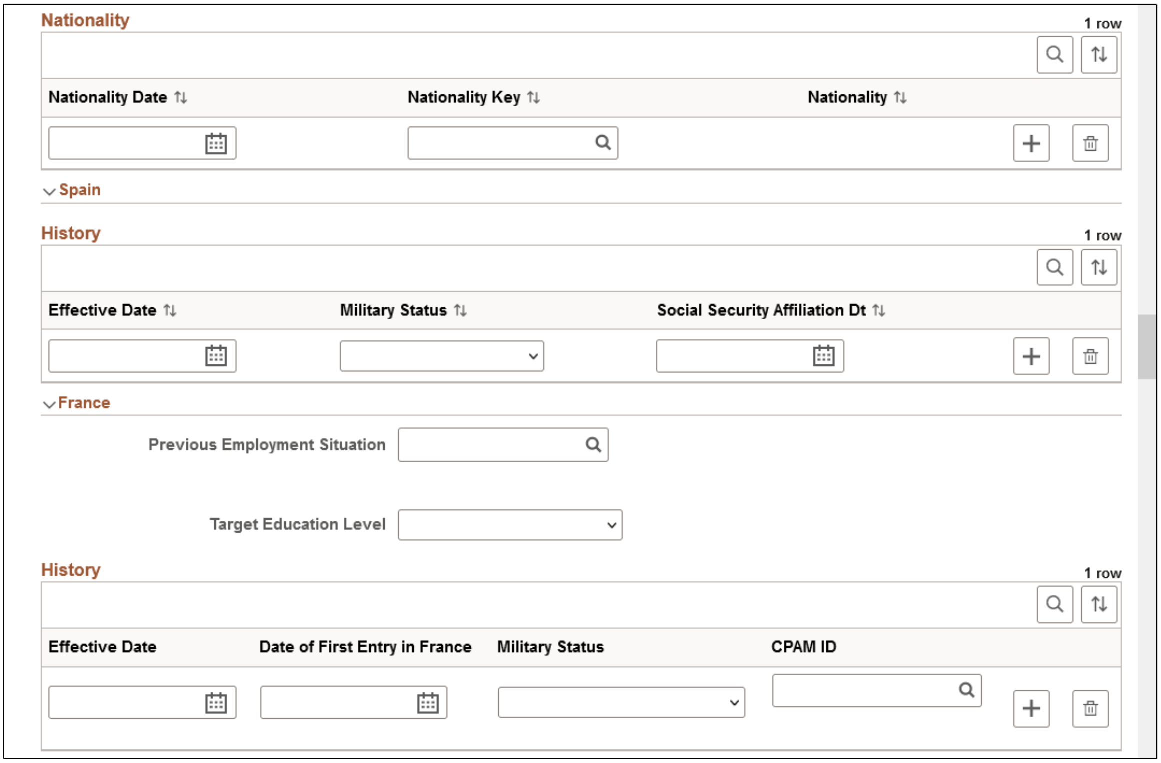
This example illustrates the Regional section of the Person Data page (4 of 12). You can find definitions for the fields and controls later on this page.



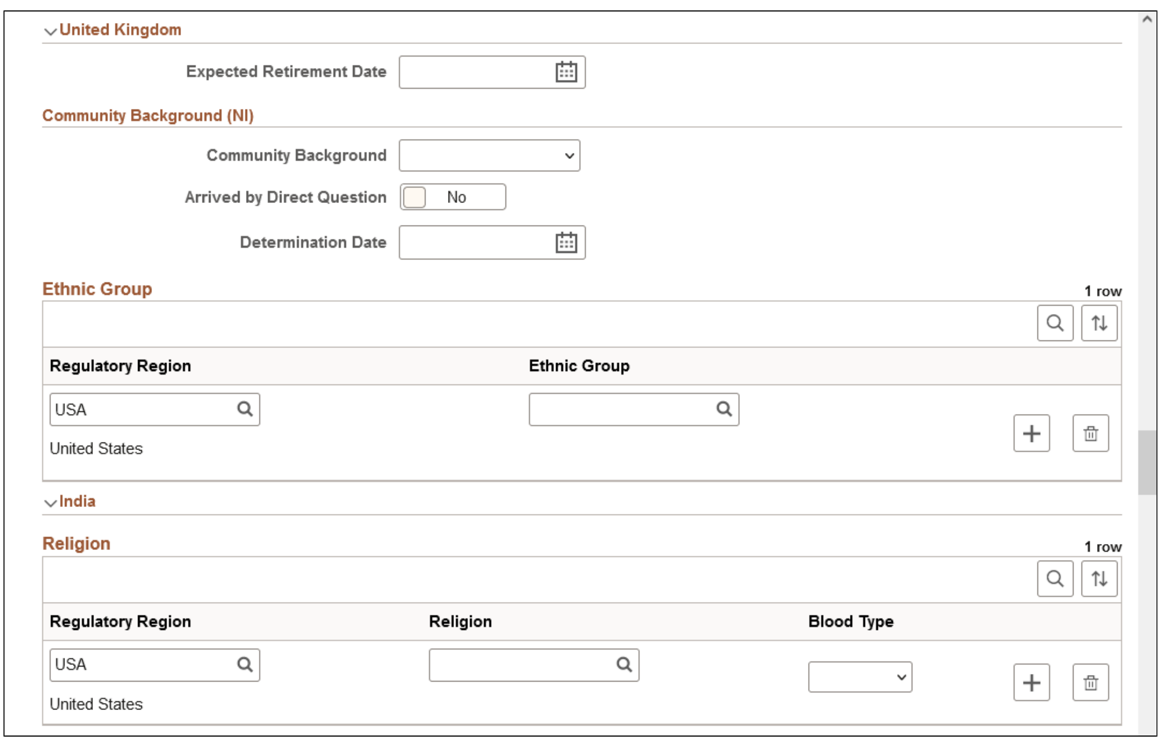
This example illustrates the Regional section of the Person Data page (5 of 12). You can find definitions for the fields and controls later on this page.



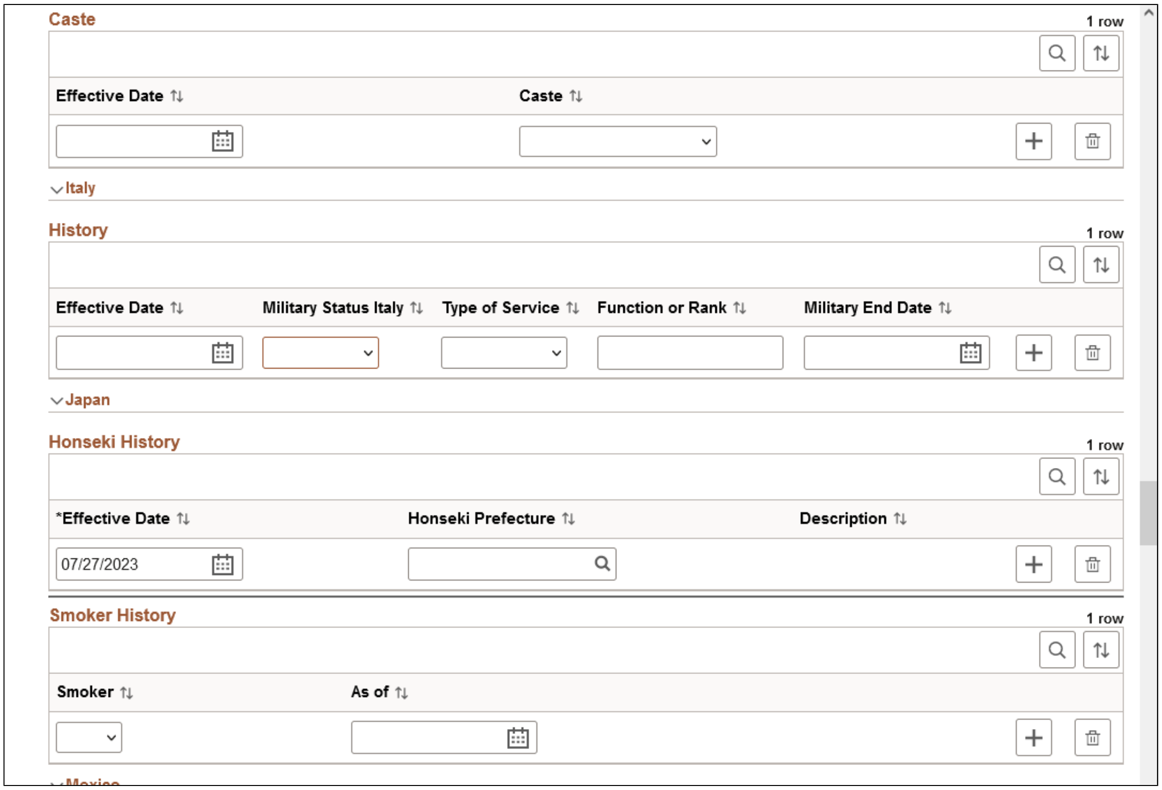
This example illustrates the Regional section of the Person Data page (6 of 12). You can find definitions for the fields and controls later on this page.



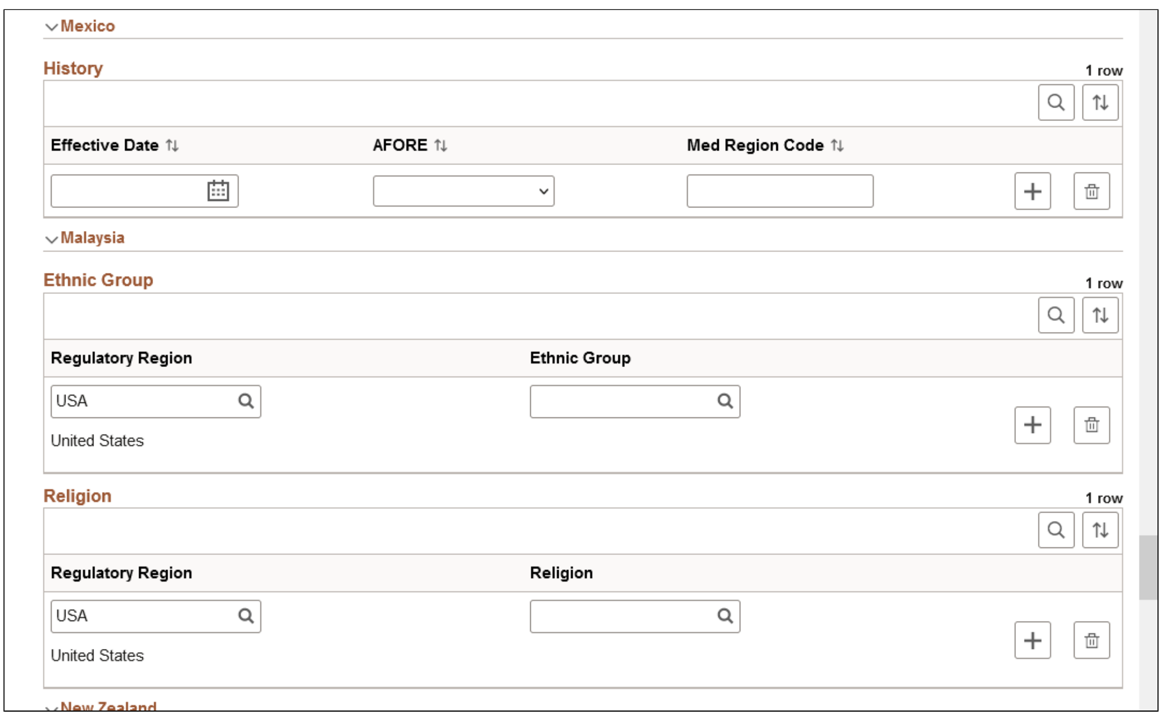
This example illustrates the Regional section of the Person Data page (7 of 12). You can find definitions for the fields and controls later on this page.



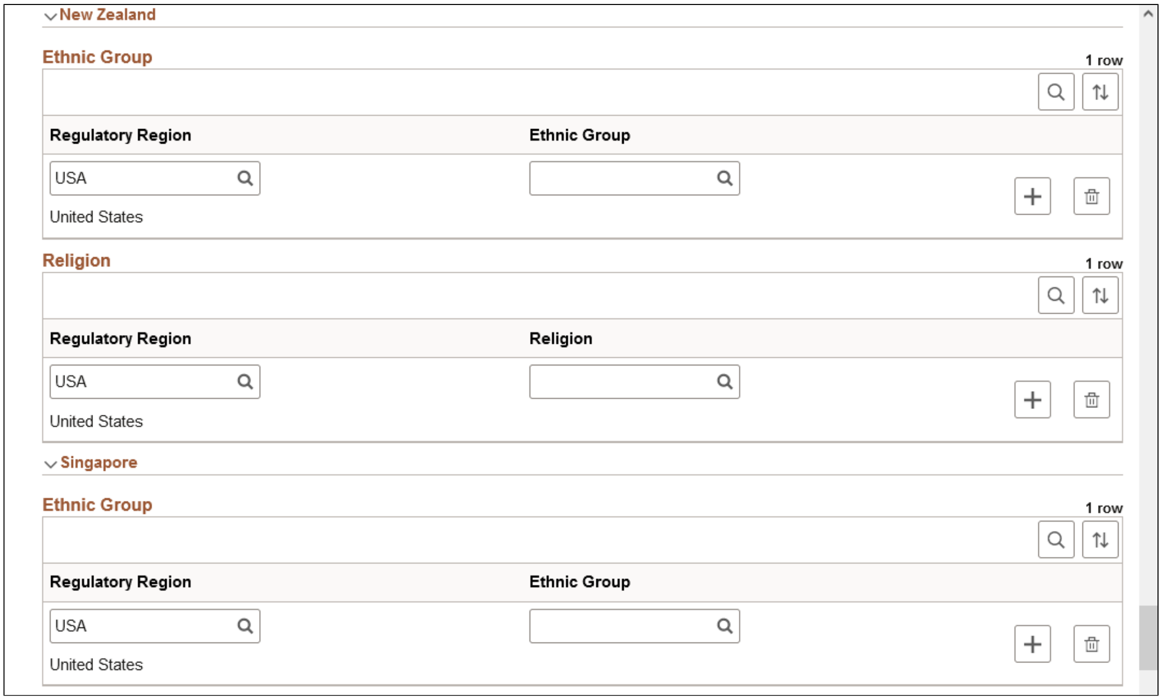
This example illustrates the Regional section of the Person Data page (8 of 12). You can find definitions for the fields and controls later on this page.



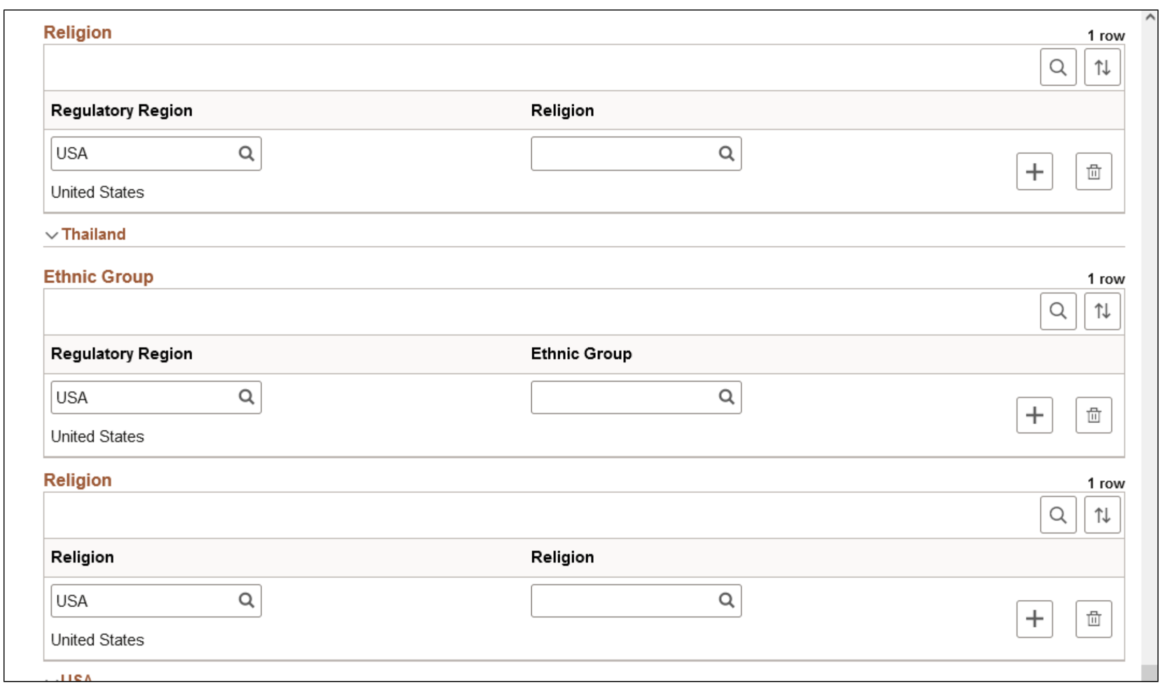
This example illustrates the Regional section of the Person Data page (9 of 12). You can find definitions for the fields and controls later on this page.



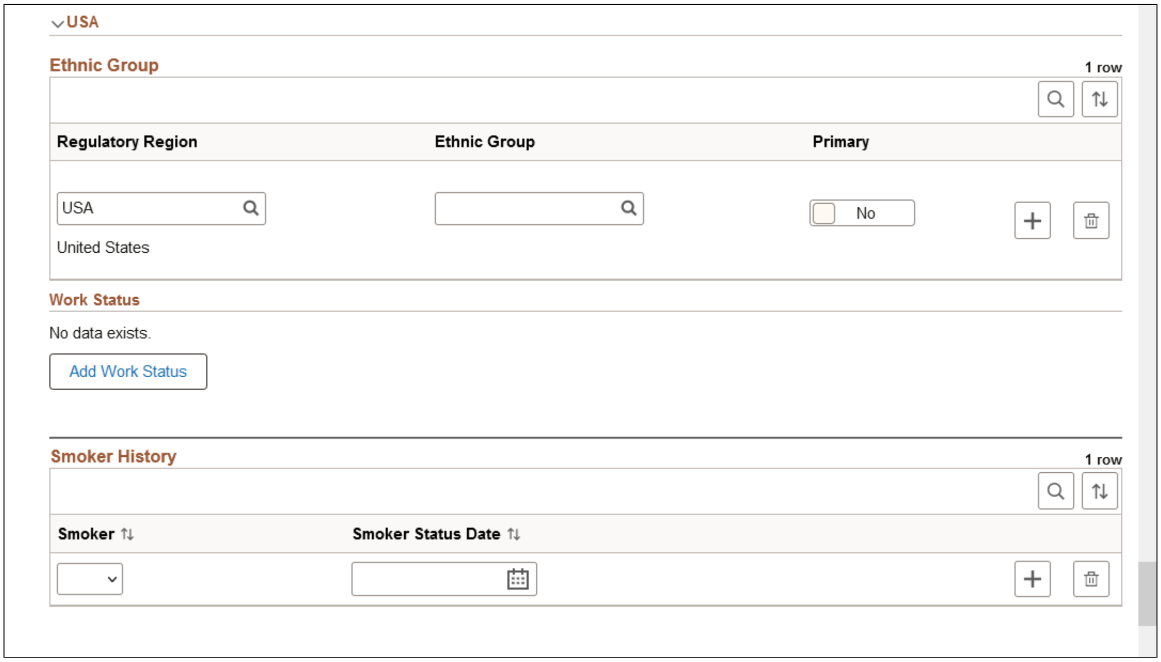
This example illustrates the Regional section of the Person Data page (10 of 12). You can find definitions for the fields and controls later on this page.



This example illustrates the Regional section of the Person Data page (11 of 12). You can find definitions for the fields and controls later on this page.



This example illustrates the Regional section of the Person Data page (12 of 12). You can find definitions for the fields and controls later on this page.



Local country laws that require employers to verify a person's nationality and eligibility to work in that country might require information that you enter here. Much of the data that you enter is required for regulatory reporting in PeopleSoft Human Resources.

Comment Elements Across Countries

Field or Control	***Description***
Regulatory Region and **Ethnic Group**	Select an ethnic group. You set up ethnic groups on the Ethnic Groups page. (AUS) Affirmative action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page. (GBR) Values are based on U.K. equal opportunity ethnic categories. (USA) Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports.
Regulatory Region and **Religion**	Enter the person's religion. In (MYS) Malaysia, (THA) Thailand, and (SGP) Singapore, you use the **Ethnic Group** and **Religion** fields for eligibility and calculation of festive advances.

Field or Control	***Description***
Smoker and **As of**	Indicate if the person is a smoker and enter the date on which the person started smoking. A person's smoker status affects benefits eligibility and rate determination in PeopleSoft Human Resources (HR) Manage Base Benefits and is required for regulatory reporting.
Military Status	Enter the person's military status. **Note:** Employees can enter and update their own military status in self service, on the Veteran Status Page.

(AUS) Australia

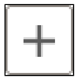
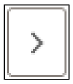
See the **Comment Elements Across Countries** section on this page discussion.

(BRA) Brazil

Information entered in this section is used in eSocial reporting.

Field or Control	***Description***
(RG/RNE) **Issued By**	Enter the Registro Geral (RG) or Registro Nacional de Estrangeiros (RNE) issuing entity. This information is required if you enter the individual's general registry or foreigner ID number on the National ID Page.
Issued Date and **State**	Enter this information, which is required if you enter the individual's general registry or foreigner ID number.
Expiration Date	Enter the expiration date for the listed entity.
(RIC) **Issued By**	Enter the Registro de Identidade Civil (RIC) issuing entity. This information is required if you enter the individual's civil registry number on the National ID Page.
Issued Date and **RIC State**	Enter this information, which is required if you enter the individual's RIC number.
Expiration Date	Enter the expiration date for the listed entity.

Field or Control	***Description***
(CTPS) **Series**	Enter the work card number.
Issued Date	Enter the work card's issued date. This information is required if a Carteira de Trabalho e Previdência Social (CTPS) number is provided.
State	Enter the political subdivision of the CTPS issuing agency. This information is required if a CTPS number is provided.
Expiration Date	Enter the expiration date for the listed entity.
(Voter Data) **Zone, Section, City,** and **State**	Enter this information, which is required if a voter registration card is provided.
(Military Data) **Series, Region,** and **Category**	Enter this information, which is required if a reserve certificate is provided.
State	Enter the political subdivision of the issued reserve certificate. This information is required if a reserve certificate is provided.
Cert Type (certificate type)	Enter the type of military service. Values are: *Aeronautic, Army, Marine,* or *Other*. This information is required if a reserve certificate is provided.
(PIS/PASEP) **Issued Date**	Enter the date of issuance at PIS / PASEP. This information is required if the PIS/PASEP number is provided on the National ID Page.
(Class Entity Registration) **Issued By**	Enter the class entity registration issuing entity. This information is required if you enter the individual's class entity number on the National ID Page.
Issued Date and **State**	Enter this information, which is required if you enter the individual's class entity number.
Expiration Date	Enter the expiration date for the listed entity.

Field or Control	***Description***
(History) **Add History** or  button  (Edit) button	Select an add button to access the (BRA) History Page and add historical details about a person's ethnicity, blood type, education, residency, and so forth. The Edit > button is available when you have added information on the Brazilian History page. Select to access the History page and view additional details or make changes.
Effective Date, **Regulatory Region**, **Ethnic Group**, **Country of Nationality**, and **Residence Period**	Displays these fields when you have added information on the Brazilian History page.

(CAN) Canada

Field or Control	***Description***
Self Identification Data link	Select this link to access the (CAN) Canada Self IdentificationData Page, where you enter ethnic background information for the person. This link is visible only to users with access to the Canada Self IdentificationData page. To secure this page and protect the confidentiality of the ethnicity data, you can use the delivered permission list *HCCPHR40CA* and the delivered role *HR Admin CAN Confdl Data.*
Bilingualism Code	Record the appropriate code for the person. If the Official Languages Act applies to the organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government.
Health Care Number and **Health Care Province**	Enter a number and select the health care province.

(CHE) Switzerland

Field or Control	***Description***
Guardian	Minors who are age 18 or younger or people with mental illness must have a parent or guardian sign employment contracts on their behalf. Enter the name of the parent or guardian who is authorized to act for this employee.
Place of Origin	Enter a place of origin. Every Swiss person has at least one place of origin, usually determined by the father or husband's birthplace.
Main Origin	Swipe to *Yes* if the place of origin in the **Place of Origin** field is the person's main place of origin. (A person can have more than one place of origin.)

(CHN) China

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Hukou Type and **Hukou Location**	Enter the person's Hukou type and locatoin.
Working Life Start Date	Enter the date on which the person first began to work.
Working & Living Status	Enter the status of the worker's working and living permit. Values are: *Expired, Granted,* and *Renewed.*
Issue Date	Enter the date on which the working and living permit was issued.
Renew Date	Enter the date on which the working and living permit was renewed.
Expiration Date	Enter the date on which the working and living permit expires.
Political Status	Enter the person's political status.

Field or Control	*Description*
Native Place	Enter the town or city or area that a person is from, especially the one in which they were born and lived while young.

(DEU) Germany

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	*Description*
HR Responsible ID	Select the ID of the human resources representative responsible for this person.
Expected Military Date	If the person hasn't already completed military service, enter the date when service is expected to begin.
Nationality Date	Enter the effective date of the person's nationality status. If the employee is a native citizen of the country, enter the person's birth date. If the person is a naturalized citizen, enter the date on which the person became a citizen.
Nationality Key and **Nationality**	Enter the person's nationality by selecting a nationality key code. German labor laws require recording an employee's nationality to determine if the employee is eligible to work in certain industries, particularly those that are related to technology or defense. Use the nationality code to determine the employee's eligibility to work in a regulated industry based on the employee's country's participation in OECD or the European Union. You can maintain information about whether each nationality code participates in the OECD and European Union. **Note:** Duevo-compliant nationality codes are established by the Duevo Directive and are provided by the PeopleSoft system.

(DEU) German Public Sector

This section is available when German Public Sector is selected on the Installation Table.

The system uses this information when performing validations using the disability processing rules defined for the job group/service class information. The maximum age for hiring a person identified as disabled is different than for a person who is not identified as disabled for certain employee categories and service class group combinations.

The disability selection here displays on the Job Data-“German Public Sector Page” (PeopleSoft Human Resources Manage German Public Sector) and is also maintained in the Disabilities component.

Field or Control	***Description***
Disabled	Select if the person is disabled.

(ESP) Spain

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Social Security Affiliation Dt (social security affiliation date)	Enter the date when the person is assigned a Spanish social security number.

(FRA) France

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Previous Employment Situation	Select the previous employment code for this person.
Target Education Level	Indicate the target education level for this person.
Date of First Entry in France	Leave blank if the person is a native-born French citizen. If the person is foreign-born, enter the date on which the person first arrived in France. This data is used to maintain work visa information for foreign workers who are employed in France.
CPAM ID (Caisse Primaire d'Assurance Maladie ID)	Enter the code of the CPAM ID that is assigned to the person. CPAM depends on the person's home address. The CPAM is the social security body that compensates persons for illness and work accidents.

(GBR) United Kingdom

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Expected Retirement Date	The system calculates and displays this value, based on the system date and the birth date that you enter on this page. This field is for information only; you can't change it.

A person's expected retirement date is based on the birth date that you enter on the Name/Location page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women will gradually increase to 65 years between 2010 and 2020. This table shows the expected retirement dates for women in the U.K.:

Birth Date	***Expected Retirement Age***
Before April 6, 1950.	60 years.
After April 6, 1950 and before April 6, 1955.	Retirement date is delayed one month for each month that the woman is born after April 6, 1950.
After April 6, 1955.	65 years.

The calculation that the system uses to determine the retirement age of U.K. employees is stored in FUNCLIB_HR_UK.EXP_RETIRE_DT.FieldFormula.

`Community Background (NI)`

The system displays the following fields only if you're logged in as an authorized user. Northern Ireland law requires that only a designated monitoring officer see community background data for employees. The system includes a special user class (UKNIPNLS) and user ID (UKNI) for you to use to enforce these rules.

Field or Control	***Description***
Community Background	Select the person's community background: *Protestant, Catholic,* or *Undetermined/Other.*
Arrived by Direct Question	Select if you determine the person's community background by asking the employee directly.

Field or Control	Description
Determination Date	Enter the date on which you determine the person's community background category. The data that you enter about a Northern Ireland worker's community background is required under the Fair Employment Act. Employers must include this information in the Northern Ireland report (UKNI001) that they submit to the administrative body that monitors employment in Northern Ireland. This report provides an annual summary of the state of the workforce for a particular employer and breaks down employees and applicants for employment into their respective community background categories.

(IND) India

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	Description
Blood Type	Select the person's blood type or select *Unknown.* When the blood type is entered on this page at the time that an employee is hired, a component interface updates the employee's blood type on the physical exam record. Thereafter, this field is disabled and displays by default the blood type data from the physical exam record.
Caste	Select the person's caste.

(ITA) Italy

Field or Control	Description
Military Status Italy and **Type of Service**	Select the status and type of service that the person performed in the military.
Function or Rank	Enter the function or rank that was held by the person in the military.
Military End Date	Indicate the date on which the person's military service ended, if applicable.

(JPN) Japan

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Honseki Prefecture	Select the family prefecture, or place of registration. Tracking a person's Honseki Prefecture is a matter of custom.

(MEX) Mexico

Field or Control	***Description***
AFORE (Retirement Funds Institution Code Mexico)	Enter the AFORE for the employee. Values include: *Banamex, Bancomer, Dresdner, GNP, Garante, ING, Inbursa, Principal, Santander, Tepeyac, XXI,* and *Zurich.*
Med Region Code (medical region code)	Enter the three-character code for the medical region where the person resides.

(MYS) Malaysia, (NZL) New Zealand, (SGP) Singapore, and (THA) Thailand

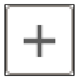
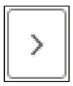
Also see the **Comment Elements Across Countries** section within this page discussion.

In Malaysia, Singapore, and Thailand, you use the **Ethnic Group** and **Religion** fields for eligibility and calculation of festive advances.

(USA) United States

Also see the **Comment Elements Across Countries** section within this page discussion.

Field or Control	***Description***
Ethnic Group	Enter one of more ethnic groups for a person. Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports. Ethnicity is also used when populating the Employee table during the Refresh Employees Table process. The Refresh Employees Table process (PER099) uses this information. See Understanding the Process of Refreshing the Employees Table.

Field or Control	***Description***
Primary	Set to *Yes* if this is the primary ethnicity for a person, if applicable.
Add Work Status,  button  (Edit) button	Select the add button to access the (USA) Work Status Page and add medicare, citizenship, and military information. The Edit > button is available when you have added information on the Work Status page. Select to access the Work Status page and view additional details or make changes.
Effective Date, **Date Entitled to Medicare**, **Eligible to Work in U.S,**, **Military Status,** and **Discharge Date**	Displays these fields when you have added information on the Work Status page.

(FPS) French Public Sector

The information that you enter here is mandatory for including an employee in the French Public Sector security system.

Field or Control	***Description***
Supporting Document Required	Select to track supporting documents. The system inserts a row in the **Supporting Documents** group box. The row is identified by the person ID, the action code, and the effective date and enables you to verify that the person provided the required documents.

For more information, see product documentation for *PeopleTools: Process Scheduler* and *PeopleTools: Global Technology*.

Related Links

Understanding French Social Security Tracking Code Maintenance

"Understanding Regulatory Requirements for Canada" (PeopleSoft Human Resources Meet Regulatory Requirements)

"Understanding Payroll Data" (PeopleSoft Payroll for North America)

"Understanding the Core Tables for PeopleSoft Manage Base Benefits" (PeopleSoft Human Resources Manage Base Benefits)

"(JPN) Setting Up Japanese Control Tables" (Application Fundamentals)

"Effective Dates" (Application Fundamentals)

"Understanding Language Support in PeopleSoft" (Application Fundamentals)

"Understanding PeopleSoft HCM System Data Regulation" (Application Fundamentals)

"Maintaining the ASCO Table" (PeopleSoft Human Resources Meet Regulatory Requirements)

"Creating Reports for the PSMPC" (PeopleSoft Human Resources Meet Regulatory Requirements)

"Understanding French Regulatory Requirements" (PeopleSoft Human Resources Meet Regulatory Requirements)
"Tracking Supporting Documents" (PeopleSoft Human Resources Manage French Public Sector)
"Understanding U.K. Regulatory Requirements" (PeopleSoft Human Resources Meet Regulatory Requirements)
"Understanding U.S. Regulatory Requirements" (PeopleSoft Human Resources Meet Regulatory Requirements)

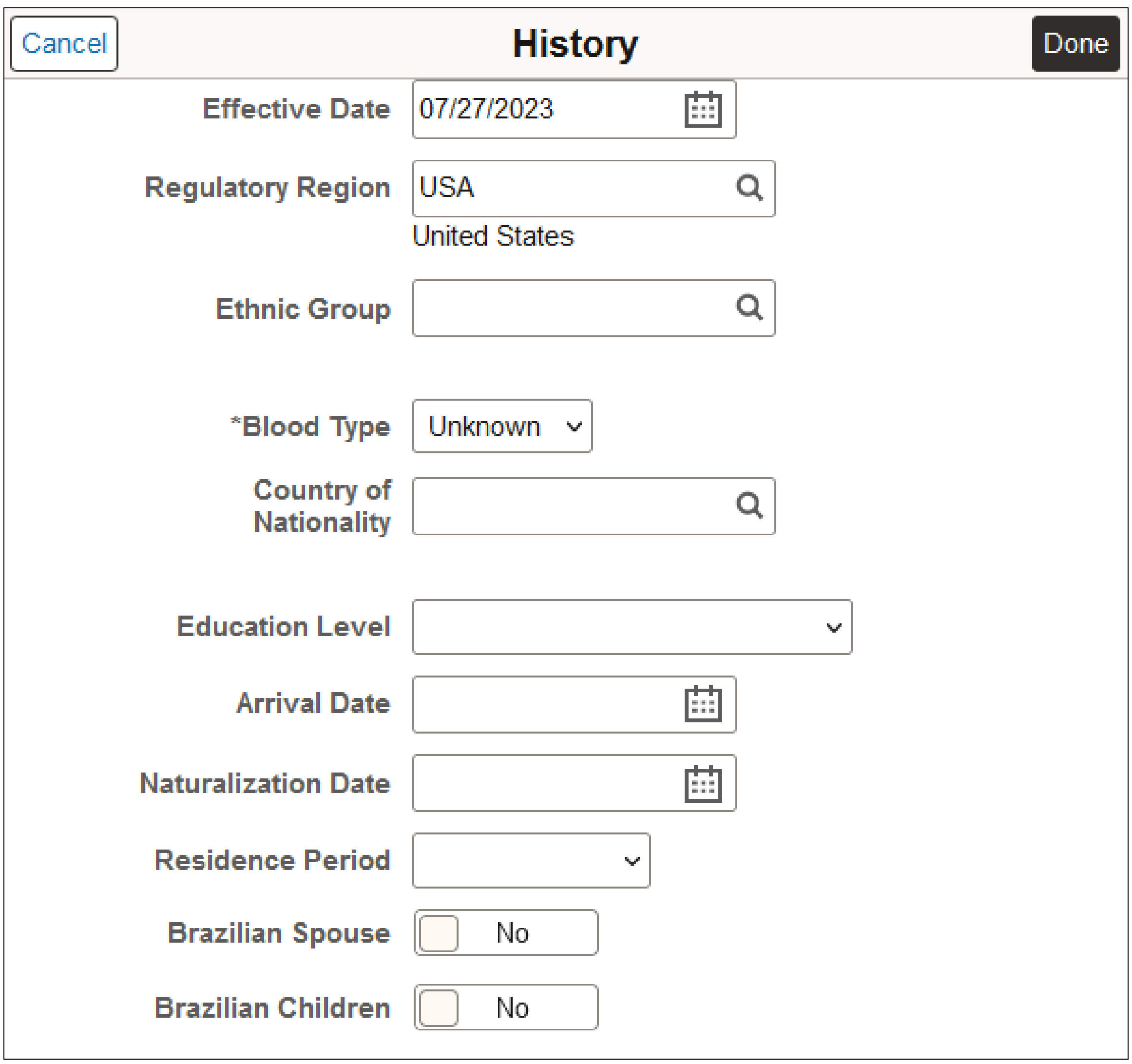
(BRA) History Page

Use the Brazilian History page (HR_PERS_BRA_SCF) to add details about a person's ethnicity, blood type, education, residency, and so forth.

Navigation:

Select the **Add History**, + (Add), or > (Edit) button under the **Brazil - History** subsection of the Person Data Page - Regional Section.

This example illustrates the Brazilian History page.



Field or Control	*Description*
Regulatory Region and **Ethnic Group**	Enter the regulatory region for the person. When you enter *BRA* as the regulatory region for a Brazilian employee, the system performs a number of validations, one of which checks for the presence of the ethnic group value. Specify the ethnic group when the regulatory region is set to *BRA*; this information is used in several Global Payroll for Brazil reports, including the RAIS and eSocial reports. Do not select *Unknown* as the ethnic group.
Blood Type	Select the person's blood type or select Unknown.
Country of Nationality	Select the nationality for the person from the Country table (COUNTRY_TBL). RAIS nationality codes were used previously.
Educational Level	Select the education level for the person.
Arrival Date and **Naturalization Date**	Enter the dates the person arrived in Brazil and the naturalization date, if applicable.
Residence Period	Specify whether the residence period of the person is *Determined* or *Undetermined*. Used in eSocial reporting, this value is required for individuals who were not born in Brazil. If the value is not specified for a non-Brazilian-born employee, the system generates a mapping error. See Also “Monitoring eSocial Events” (PeopleSoft Global Payroll for Brazil).
Immigration Condition	This field appears when you select a residence period. Select the immigration condition for the person. The list of values is different based on the selected residence period. Possible values include: *Asylum Seeker* - This value applies to the *Determined* residence period only. *Benefited - Mercosur Countries* *Benefited - Treaty BRA & POR* *Brazilian's Family* *Dependent of Diplomat/Consular* - This value applies to the *Determined* residence period only. *Other Conditions* *Refugee* - This value applies to the *Undetermined* residence period only.

Field or Control	***Description***
Brazilian Spouse and **Brazilian Children**	Swipe to *Yes* if this person has a Brazilian spouse or children.

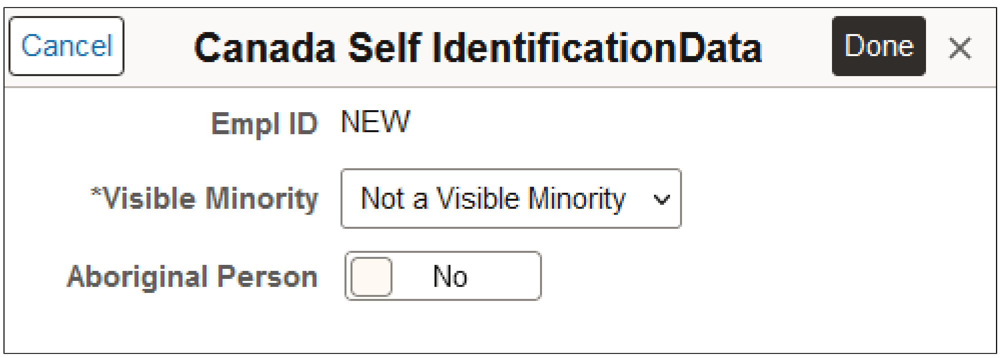
(CAN) Canada Self IdentificationData Page

Use the Canadian Self IdentificationData page (CAN_SLF_ID_DATA_FL) to enter identification information for Canada.

Navigation:

Select the **Self Identification Data** link under the **Canada** subsection of the Person Data Page - Regional Section.

This example illustrates the Canadian Self IdentificationData page.



Field or Control	***Description***
Visible Minority	Indicate if the person's ethnic background is apparent based on physical appearance.
Aboriginal Person	Indicate if the person is a Canadian aboriginal person.

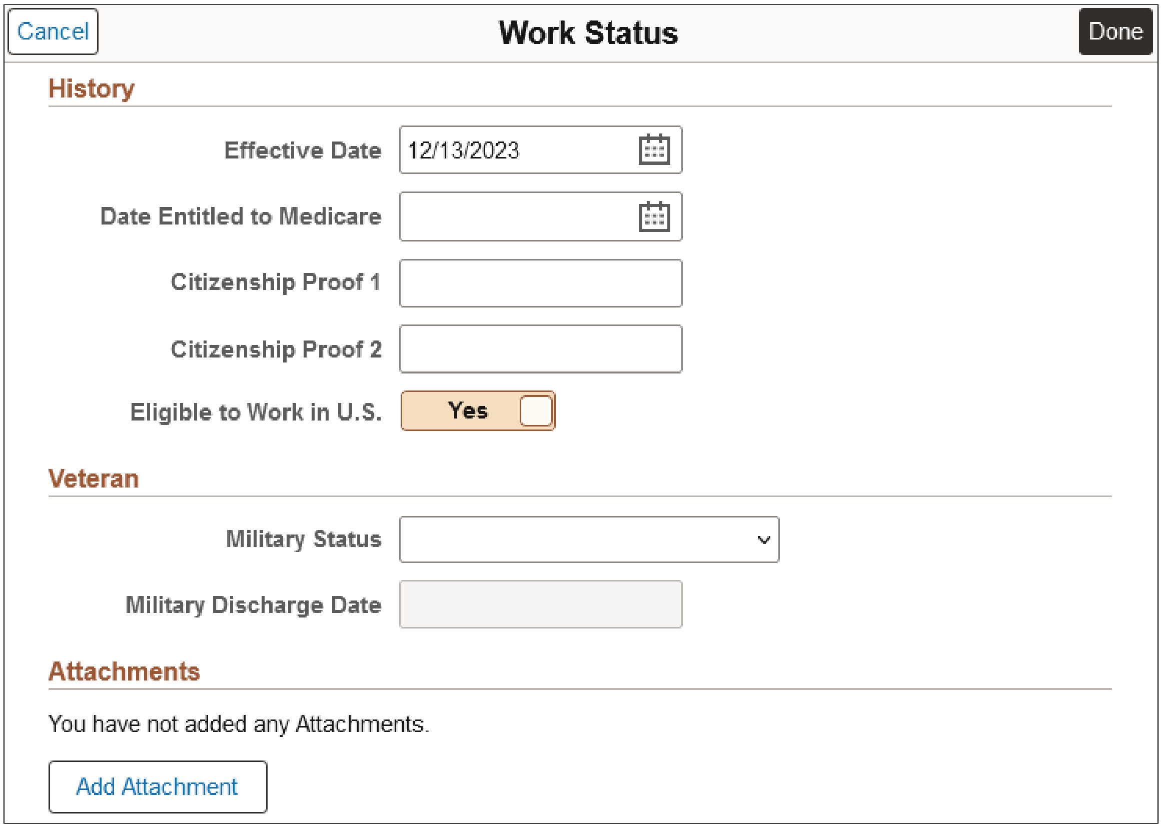
(USA) Work Status Page

Use the United States Work Status page (PERSON_USA_SCF) to enter Medicare, citizenship, military information, and add supporting attachments.

Navigation:

Select the **Add Work Status** button, + (Add), or > (Edit) buttons within the **USA** subsection of the Person Data Page - Regional Section.

This example illustrates the Work Status page.



History

Field or Control	*Description*
Date Entitled to Medicare	(Optional) Enter the date on which this person is entitled to receive Medicare coverage.
Citizenship (Proof 1) and **Citizenship (Proof 2)**	Enter two forms of ID (for example, *passport* and *Social Security card)* to prove U.S. citizenship (required by U.S. law).
Eligible to Work in U.S.	Indicate if the person is eligible to work in the U.S.

Veteran

Field or Control	*Description*
Military Status	Shows the military status option selected by the employee on the Veteran Status Page. The default values is a blank field.

Field or Control	***Description***
Military Discharge Date	Displays the military discharge date entered by the employee in the **Military Discharge Date** field on the Veterans Status self-identification page (or edited on the Military Discharge Date page). This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.
Edit Discharge Date	Select to access the Military Discharge Date page where you can edit the employee's military discharge date.

(Work Status) Attachments

This section is available when the **Veteran** check box is selected in the **Person data** section on the Person and Job Installation - Person and Organization Page.

Use the **Attachments** section to provide additional documentation to support a person's veteran information.

Field or Control	***Description***
Add Attachment button	Select this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, select **Done** to return to this page.
Attachments link and **Description**	Displays the uploaded file as an active link in the **Attachments** field. Enter a description of the file. The page will also display who uploaded the file and the date and time it was uploaded.

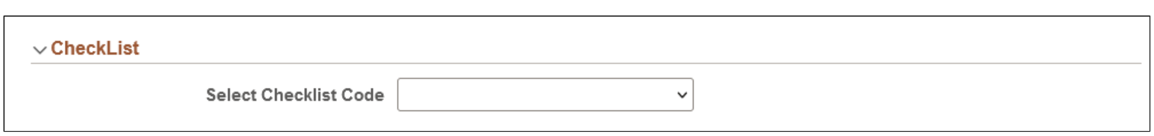
Person Data Page - CheckList Section

Use the CheckList section of the Person Data page (PERSONAL_DATA_FL) to identify a checklist of tasks to perform after adding this person.

Navigation:

Navigate to the **CheckList** section on the Person Data Page in fluid.

This example illustrates the Checklist section of the Person Data page.



Field or Control	Description
Select Checklist Code	Select a checklist that you want to associate with the person. The administrator can then use the Person Checklist Page to perform all the required administrative tasks for a person. The person checklist is available as a link from the Person Confirmation Page after you save this record. Valid checklists are defined on the Checklist Page.

Person Data Page - <Drop Zone> Section

Use the drop zone section of the Person Data page (PERSONAL_DATA_FL) in fluid to enter data for custom steps that use drop zones embedded in your activity guide process.

Note: The HCM system delivers four Drop Zone pages that you can configure to add information specific to your organization. See “Understanding Drop Zones” (Application Fundamentals).
If you do not want to use the delivered Drop Zone sections in the activity guide, turn it off using Page and Field Configurator (“Understanding Page and Field Configurator” (Enterprise Components)).

Navigation:

Navigate to a <Drop Zone> section or page of Person Data in fluid.

This video provides an overview of Drop Zones:

Video: PeopleSoft Drop Zones on Fluid and Classic Plus Pages

Person Data Page - Validation Section

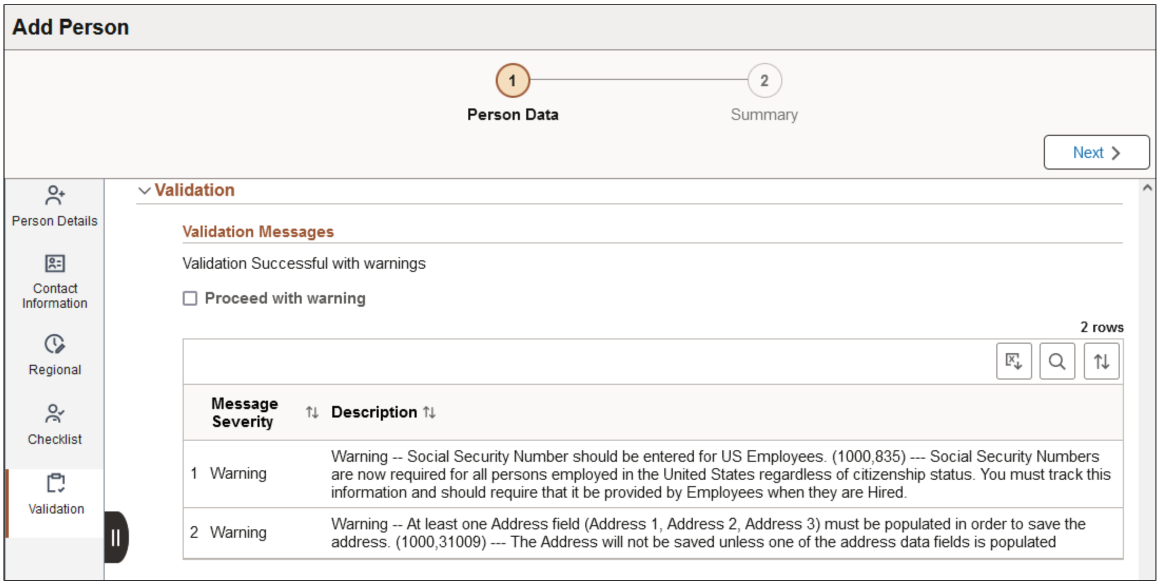
Use the Validation section of the Person Data page (PERSONAL_DATA_FL) to view error and warning messages related to the Person Data validation process, if any.

Note: When there are no validation errors or warnings, the process will not show this section. The activity guide process will move to the next step.

Navigation:

Select the **Next >** button on the Person Data Page in fluid.

This example illustrates the Validation section of the Person Data page.



Field or Control	***Description***
 button	Select to run the validation process.

Validation Messages

When the validation process encounters errors or warnings, the page will indicate one of the following messages:

- *Validation failed*, indicating Error messages are present.

  You must fix Errors before you can proceed with the person submission process. Access the section that contains the information about the error message, fix the error, and select the **Next** button to run the validation process again.

- *Validation Successful with warnings*, which appears when only Warning messages are present.

  You can still submit the information with warnings.

Field or Control	***Description***
Proceed with warning check box	This check box appears when there are warning messages only. Select this check box when you have warning messages that you want to ignore.

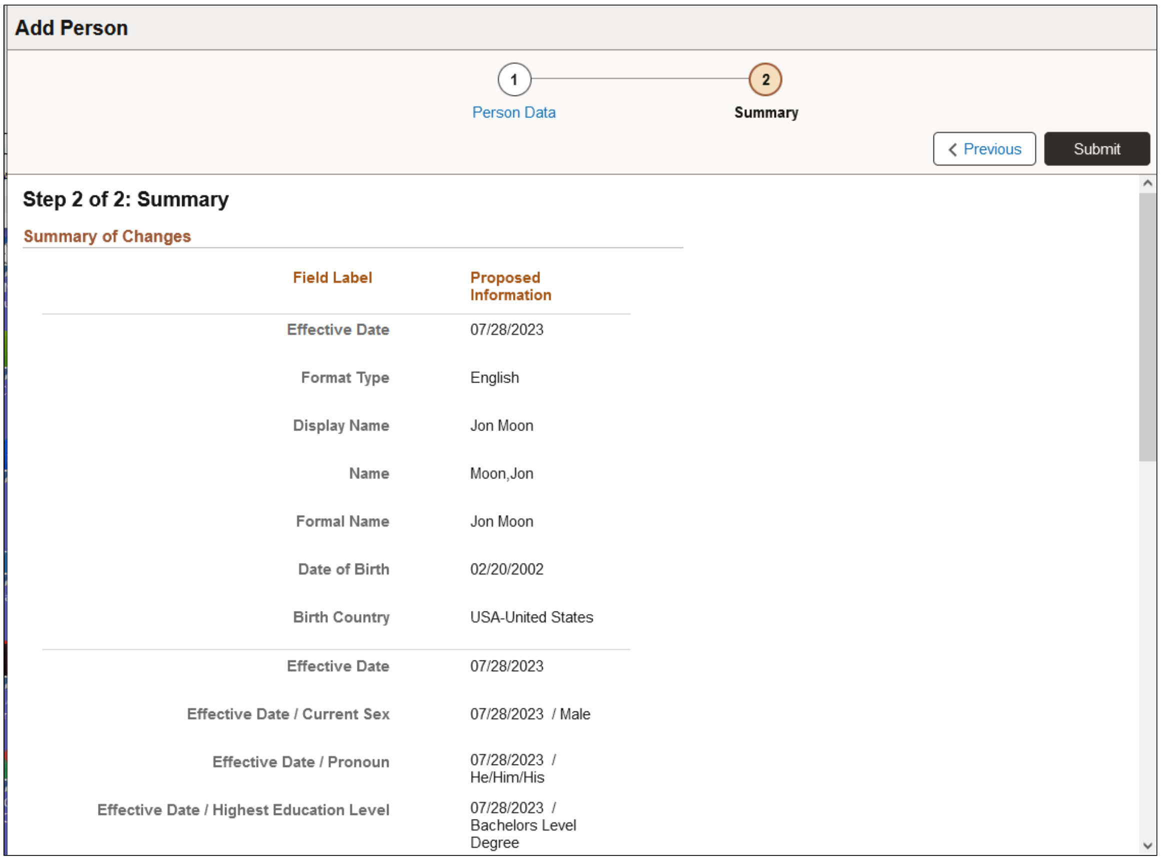
Add Person - Summary Page

Use the Add Person - Summary page (PERSONAL_DATA4_FL) to view the proposed information you are adding for a person record.

Navigation:

Select the **Next >** button on the Person Data Page in fluid, provided there are no validation errors or you have chosen to proceed with the warnings.

This example illustrates the Add Person - Summary page.



Displays the proposed values you will submit.

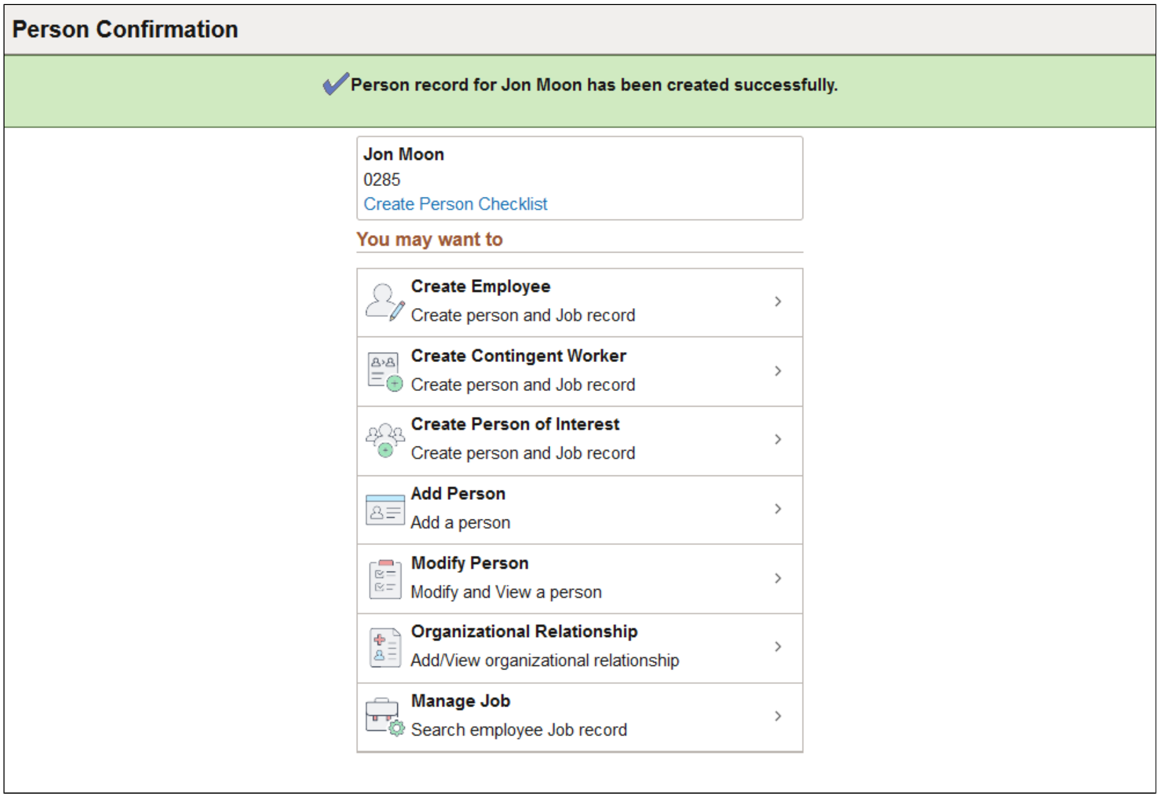
Field or Control	***Description***
Previous button	Select this button to correct or add additional information before you submit.
Submit button	Select this button to submit and save the information to the system.

Person Confirmation Page

Use the Person Confirmation page (PERSON_DATA_SUB_FL) to confirm that a person record was successfully created. You can also initiate the process to add or modify person data, creating or view organizational relationships, manage a person's checklist, or view or modify job data for an existing person.

Navigation:

This example illustrates the Person Confirmation page.



Field or Control	***Description***
Create Person Checklist	Select to access the Person Checklist Page to perform all the required administrative tasks for a person.

You may want to

This section provides quick access to many of the same transactions available from the Manage Human Resources Dashboard.

Field or Control	***Description***
Create Employee	Select to access the Add Person Page and add a person with an employee job instance.

Field or Control	*Description*
Create Continent Worker	Select to access the Add Person Page and add a person with a contingent worker job instance.
Create Person of Interest	Select to access the Add Person Page and add a person with a person of interest job instance.
Add Person	Select to access to the Add Person Page and add person data only.
Modify Person	Select to access the Modify Person pages (Modify Person Tile) and update person data only for an existing person.
Organizational Relationship	Select to access the (Fluid) Organizational Relationship Page and add or view a summary of a person's organizational relationships.
Manage Job	Select to access the Manage Job pages in fluid and add new job rows or update a person's historical job data using the fluid pages. See (Fluid) Updating Job Data.

Related Links

Controlling Data Access for POIs Without Jobs
(Classic) Adding Organizational Instances
“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)

Controlling Data Access for POIs Without Jobs

These topics provides an overview of security for POIs without jobs and discuss how to add and maintain POI types.

Pages Used to Control Access to the Data of POIs Without Jobs

Page Name	*Definition Name*	*Usage*
(Classic) Add a POI Relationship or Maintain Person of Interest Page	PER_POI_TRANS	Set up and maintain a person of interest's POI type and security access keys using the classic pages.

Page Name	***Definition Name***	***Usage***
(Fluid) Maintain Person of Interest Tile	HC_HR_PERS_POI_MAINT_GBL_FL (this is the cref for this tile)	Access the fluid page to maintain a person of interest's POI security access keys
(Fluid) Add Person of Interest or Maintain Person of Interest Page	PERS_POI_TRANS_FL	Maintain a person of interest's POI type and security access keys using the fluid pages.

Related Links

"Understanding PeopleSoft Security" (Application Fundamentals)

Understanding Security for POIs Without Jobs

When a POI does not have a job record you need to enter additional information about them in order to control user access to their data.

Data access for POIs without jobs is primarily controlled by POI type. Assign the person a POI type in the following components:

- (Classic) Add Person of Interest component (PERS_POI_ADD) or Maintain POI Relationship component (PERS_POI_MAINTAIN).
- (Fluid) Maintain Person of Interest component (PERS_POI_MAINT_FL).

You can add additional security criteria by assigning the person to one or more business units, locations, or institutions.

For example, a person has the POI type of *External Instructor* and the following security types:

Security Type	***Security Key***
Location	CCBC1
Business Unit	CFBBU
Institution	PSSTA

The following users have access to this person:

- User A, who has access to all External Instructor POIs.
- User B, who has access to all External Instructor POIs in the location CCBC1.
- User C, who has access to all External Instructor POIs in the business unit CFBBU.
- User D, who has access to all External Instructor POIs in the institution PSSTA.

Note: Data permission security for employees, contingent workers, and POIs with jobs is controlled by data you enter on the person's job record.

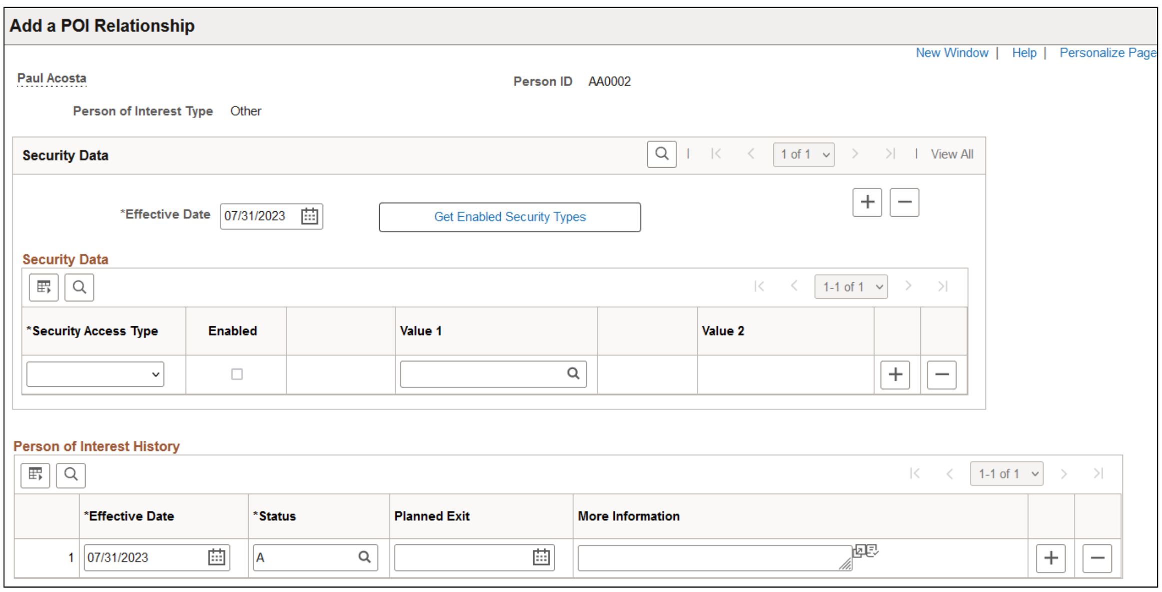
(Classic) Add a POI Relationship or Maintain Person of Interest Page

Use the Add a POI Relationship page or Maintain Person of Interest page (PER_POI_TRANS) to set up and maintain a person of interest's POI type and security access keys using the classic pages.

Navigation:

- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **Add Person of Interest** > **Add a POI Relationship**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **Maintain Person of Interest** > **Maintain Person of Interest**

This example illustrates the fields and controls on the Add a POI Relationship page.



Field or Control	Description
Person of Interest Type	Select a person of interest type when you create a record for the person. You can create multiple records for a person with different POI types. Define POI types in the Person of Interest Types component.

Security Data

Field or Control	***Description***
Get Enabled Security Types button	Click to add a row to the Security Data grid for each security type that has been enabled for the people without jobs. **Note:** You can enter data for a type that has not been enabled, allowing you to capture additional data on a POI without a job without having to modify the system. To do this, you must create a new security type on the Security Access Type page for the People without Jobs Security Set and enter a new field name. Then use the new field name in this component and capture the required data for this POI.
Security Access Type	To restrict user access to this person's data using values in addition to the POI type, select a security access type.
Value 1 and **Value 2**	If you select a security access type of *Business Unit* or *Institution*, select the business unit or institution associated with this person for security purposes. If you select a security access type of *Location*, first select the appropriate business unit for the location's setID for value 1 and the location associated with this person for security purposes for value 2.

You can enter multiple rows in this group box to set up multiple security access types and keys. PeopleSoft includes the Business Unit, location, and institution security types as part of the system data. You can choose to disable any of these security types.

See “Understanding PeopleSoft Security” (Application Fundamentals).

Person of Interest History

Maintain a history of this person of interest type using the effective date field and by adding new rows as necessary. Make the row inactive if they are not being used in system.

Note: Some of the POI Types without Jobs use application-specific transaction tables to capture the history of this relationship. The system makes this table available for External Trainee or Other POIs. You can track information about Students and External Instructor POIs on other system components intended for this purpose For example, the External Instructor POI Type is tracked in the learning instructor table components. This is defined on the POI Type setup table.

See “Setting Up Instructors” (PeopleSoft Human Resources Administer Training).

See *PeopleSoft Enterprise Learning Management* documentation.

Field or Control	Description
Planned Exit	Select the date the person will exit this person of interest type, if known. This field is for information only.

(Fluid) Maintain Person of Interest Tile

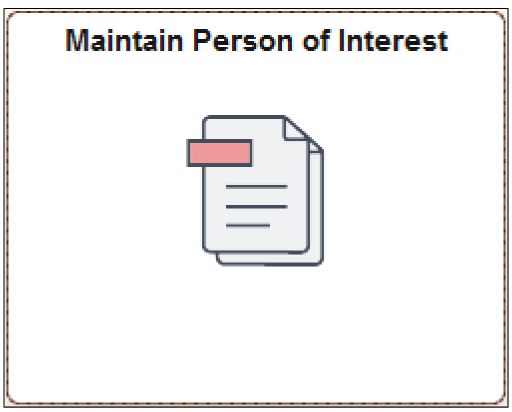
Use the Maintain Person of Interest tile to access the fluid page to maintain a person of interest's POI security access keys.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin Maintain POI* role.

Navigation:

The Maintain Person of Interest tile is delivered on the Manage Human Resources Dashboard.

This example illustrates the Person of Interest tile.



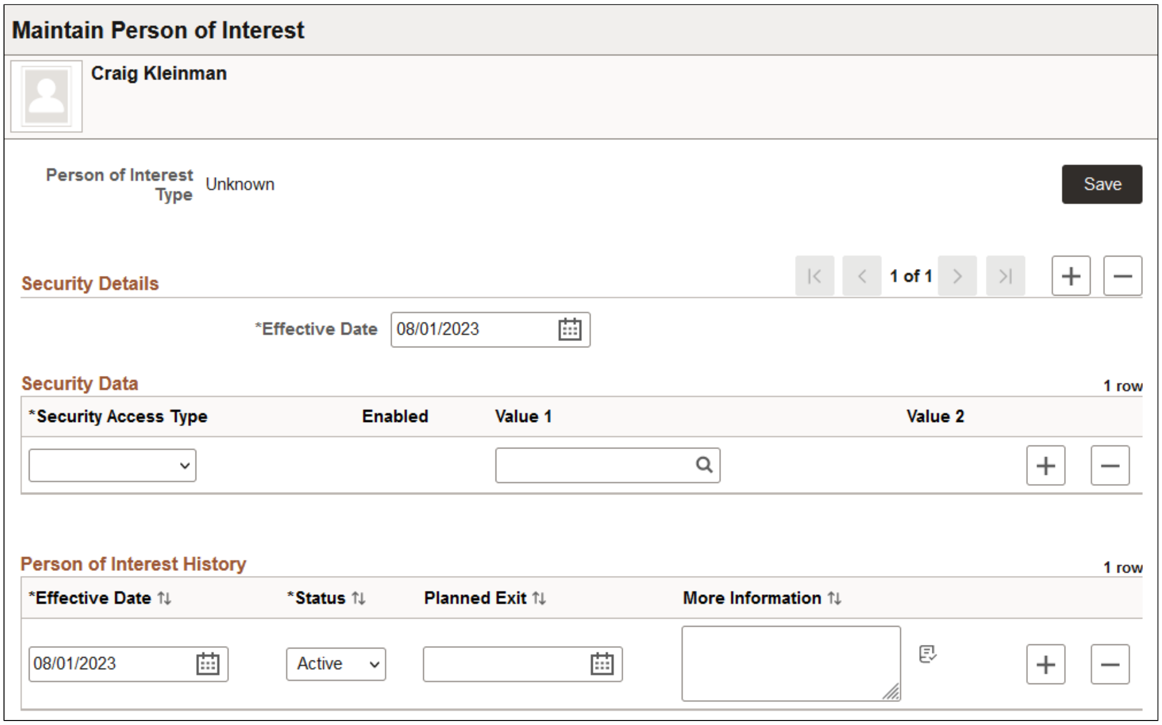
(Fluid) Add Person of Interest or Maintain Person of Interest Page

Use the Add Person of Interest page or Maintain Person of Interest page (PERS_POI_TRANS_FL) to add or maintain a person of interest's POI type and security access keys using the fluid pages.

Navigation:

- **Workforce Administrator home page** > **Manage Human Resources tile** and select the (Fluid) Maintain Person of Interest Tile.
- Select the **Add Organizational Relationship** button on the (Fluid) Organizational Relationship Page or (Fluid) Add Organizational Relationship Page when you have selected a POI not associated with a job

This example illustrates the fields and controls on the Maintain Person of Interest page in fluid.



See the (Classic) Add a POI Relationship or Maintain Person of Interest Page topic for field definitions.

Chapter 9

Increasing the Workforce

Understanding Job Data

You can add a new job record to the system in several ways. Each way uses its own component. Although the components are made up of the same pages, each one is configured to help you enter the correct data for a particular situation.

Before you create a job record for a person, you must add them to the system using the classic Add a Person component (PERSONAL_DATA_ADD) of the fluid Add Person component (PERSONAL_DATA_FL). You can even use the fluid Create Employee Tile, Create Contingent Worker Tile, or Create Person of Interest Tile to add a person record and job instance at the same time.

See (Classic) Adding a Person, (Fluid) Adding a Person, and (Fluid) Adding Organizational Instances.

Most of these components consist of the same job data pages. The data that you enter on these pages is used throughout PeopleSoft Human Resources and PeopleSoft HCM to manage the people in the system. The process of entering additional data for employees or contingent workers that is not covered in the job data pages discussed in these topics can be found elsewhere in this documentation.

Note: Template-based hires does not use the actual job data pages in the template, however, it does use all the fields broken up into logical sections.

See “Hiring Applicants” (PeopleSoft Talent Acquisition Manager).

See Understanding U.S. Federal Hiring.

See (ARG) Providing Additional Information for Argentinean Employees.

See Understanding the Process of Updating Person and Job Information.

See “Understanding the Hiring Process” (PeopleSoft Human Resources Manage French Public Sector).

See (Fluid) Updating Job Data.

Classic Job Data Pages

Component	*Menu*	*Use To*
(Classic) Add Employment Instance (JOB_DATA_EMP)	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a new employment organizational instance for a person who doesn't have applicant information in the system.

Component	***Menu***	***Use To***
(Classic) • (FPS) Hire Employee (EE_HIRE) • (USF) Hire Employee USF (EE_ HIRE)	(FPS) Workforce Administration, FPS Business Rules (USF) Workforce Administration	Add a new employee who doesn't have applicant information in the system.
(Classic) Template-Based Hire (HR_ TBH_JOB)	• Workforce Administration, Template-Based Hire • Manager Self-Service, Job and Personal Information, Add Template-Based Hire	Add a new hire by picking a pre-configured template and completing a simple data entry page. Once the data is entered it can be saved directly to the database, submitted for processing or saved for later.
(Classic) • Hire (HR_MANAGE_HIRES) • (FPS) Hire • (USF) Hire USF (ER_GVT_HIRE_ LAUNCH)	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires	Add a job applicant with information in the system, added through the Recruit Workforce business process. When you use these components to hire an applicant, the information that you've already entered in the system becomes part of the worker's record, including the referral source information. All other fields on these pages are documented in these topics. **Note:** (USF) Federal users can find information on hiring job applicants in the Recruit Workforce business process. (FPS) French Public Sector users can find information on hiring job applicants in the Recruit Workforce business process.
(Classic) Add Contingent Worker Instance (JOB_DATA_CWR)	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a contingent worker organizational instance.

Component	*Menu*	*Use To*
(Classic) Add POI Instance (JOB_DATA _POI)	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a POI organizational instance for a person who does not comprise the workforce but for whom you require a job record.
(Classic) • Add Additional Assignment (ADD_PER_ORG_ASGN) • (FPS) Add Concurrent Empl Record FPS (HIRE_DATA_BIS) • (USF) Concurrent Hire USF (EE_CONC_HIRE)	Workforce Administration, Job Information **Note:** Access the Concurrent Job component from the Add Additional Assignment component (ADD_PER_ORG_ASGN).	Add an additional employment instance for an employee or contingent worker.
(Classic) Job Data (JOB_DATA).	Workforce Administration, Job Information	Update (including adding temporary assignments) the job record of an employee, contingent worker, or POI.

Note: The components that you use to add and update job records are made up of a number of different pages. To navigate through the entire component, click the Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation links at the bottom of the pages.

Fluid Job Data Pages

Component	*Menu*	*Use To*
(Fluid) Create Employee (PERSONAL_DATA_FL and JOB_DATA_ADD_FL)	Workforce Administrator home page, Manage Human Resources tile, Create Employee tile	Add a person and create an employee job relationship for a person using the fluid activity guide process.
(Fluid) Create Contingent Worker (PERSONAL_DATA_FL and JOB_DATA_ADD_FL)	Workforce Administrator home page, Manage Human Resources tile, Create Contingent Worker tile	Add a person and create a contingent worker job relationship for a person using the fluid activity guide process.
(Fluid) Create Person of Interest (PERSONAL_DATA_FL and JOB_DATA_ADD_FL)	Workforce Administrator home page, Manage Human Resources tile, Create Person of Interest tile	Add a person and create a person of interest job relationship for a person using the fluid activity guide process.

Component	**Menu**	**Use To**
(Fluid) Organizational Relationship (HR _PERS_ORG_REL_FL)	Workforce Administrator home page, Manage Human Resources tile, Organizational Relationship tile	Add a job record (as an employee, contingent worker, or POI) using the fluid activity guide process for a person who is already in the system.
(Fluid) Job Data (JOB_DATA_FL)	Workforce Administrator home page, Manage Human Resources tile, Manage Job tile	Update the job record of an employee, contingent worker, or POI using the fluid activity guide process.

Adding New Job Records through the PeopleSoft Services Procurement Integration

A new job record may also be created in the system if your organization uses the PeopleSoft Services Procurement product within the PeopleSoft Supply Chain Management (SCM) database. The PeopleSoft applications deliver integration points that enable you to use PeopleSoft Human Resources as your system of record for contingent workers who are brought in to fill PeopleSoft Services Procurement requisitions.

When a work order is submitted in Services Procurement, the Services Procurement application does the following:

1. If the Services Procurement service provider is a new candidate, Services Procurement sends a message to Human Resources requesting Human Resources to add this person with an organizational relationship of contingent worker, add a job assignment, and create a user profile.

2. If the Services Procurement candidate already exists in the Human Resources system, Services Procurement sends a message with this person's ID requesting Human Resources to create a new job assignment for this person.

3. When a Services Procurement work order is closed or cancelled, Services Procurement sends a termination message to Human Resources. Human Resources then terminates the associated job assignment.

Human Resources uses the Component Interface (CI) and internal services to add the person, job, and user profile. This integration is automated and requires manual intervention only if there is a problem. For example, let's say Human Resources has successfully added a person profile from a Services Procurement request but encountered errors when creating the job assignment, such as an incorrect job code or location code. Human Resources sends a message back to Services Procurement stating that the person was created but the job assignment and user profile were not created and lists the error details. A Services Procurement administrator will then access the error correction page, correct the data, and resubmit the request. Human Resources will process the updated information, create the job assignment and user profile, and send an acknowledgement back to Services Procurement.

Note: The *PeopleSoft Services Procurement* help provides the technical details of the integration between PeopleSoft Human Resources and PeopleSoft Services Procurement.

Additional integration enables you to use Services Procurement to search for contingent workers as an alternate source of filling job postings in PeopleSoft Talent Acquisition Manager. When you use this integration, and a new Services Procurement candidate is sent to Talent Acquisition Manager for hiring.

Talent Acquisition Manager initiates the hire process and sends all necessary Human Resources data to Services Procurement to add the contingent worker information. When the hire is successful, Talent Acquisition Manager sends a message to Services Procurement stating that the candidate was added. At this point, Services Procurement will send a message to Human Resources to add a user profile for this candidate in the Human Resources system. Human Resources will add the user profile and send an acknowledge message. Services Procurement continues to send messages directly to the Human Resources system when it is time to terminate the Services Procurement service provider.

See *PeopleSoft Services Procurement*

See “Posting Jobs to PeopleSoft Services Procurement” (PeopleSoft Talent Acquisition Manager).

Understanding the Job Data Pages

The information that you enter when you add a new employment, contingent worker, or POI instance is the foundation for most of the business processes that you carry out later. That information includes the following:

- General employment information.

  Includes business title and work phone. This information is optional, but useful for reporting purposes.

- Specific job data.

  Includes the person's department, job code, company, supervisor, and compensation information.

- Earnings data.

  This information is included if the person's compensation comes from more than one department or category. You specify how to distribute the person's earnings among the sponsoring groups.

- Benefits program.

After you enter job information into the system, you can work with it in a variety of ways. For example, you can generate printed reports, view summary data pages, and perform ad hoc queries online. You can also use job data as the basis for performing tasks in all other aspects of human resources management, such as salary administration, regulatory requirements, payroll, and benefits.

Understanding Employment Information Data

Unlike the data on the Job Data pages, the information for Employment Information isn't effective-dated, so the data that you enter and review on this page tells you about the worker's current information for this employment record number.

This means that if you rehire a worker and enter a future effective date, the system deselects the **Termination Date** and **Assignment End Date** fields. To review information that is in other data rows, use the Job Data component.

This page tracks data at two different levels: organizational and assignment. The organizational instance is the occurrence of an employment, contingent worker, or POI relationship with an organization, initiated when you create the person's first job data record. The system uses an organizational instance record number to distinguish between organizational instances. The organizational instance number is the same as the Employment Record (ERN) of the original (controlling) job data record under that instance.

The assignment level is the actual job data record, or records, associated with the instance. Since people can have more than one job data record under an instance (for example, an additional job or a temporary assignment), tracking the dates of the assignments separately from the dates of the instance enables you to distinguish between when a person was hired (tracked at the instance level) and terminated and when they started and completed an assignment or job.

The system uses the dates of the original job data record under an instance (when there are more than one job data records under an instance, this job data record is the *controlling instance*) to determine the dates of the instance. All other assignments under the instance inherit the instance dates from the original assignment.

The system also uses the actions you use on a job data record to determine which dates to update. For example, when you use the action of *HIR* (hire), the system assumes that the new job data record represents a new instance for a new hire, with its own hire dates. However, if you use the action of *ADL* (additional job), the system assumes that the new job data record is in addition to an existing instance and will use the hire dates from the controlling instance.

This example illustrates how the system establishes and tracks the organizational record numbers, ERNs, instance dates, and assignment dates for someone with multiple organizational relationships and job data records:

Note: This example is intended to illustrate the record number fields and the system date fields, not every field on this page.

Bobby Singh joined company XYZ on February 2, 2012. At the end of 2016, company ABC bought company XYZ; it completed the takeover on January 1, 2017. When the HR administrator at company ABC first enters Bobby in the system, he creates a job data record with the action of *HIR* and an effective date of January 1, 2017, reflecting Bobby's hire date with the new company.

The fields on the Employment Data page have the following values:

Bobby Singh	***Empl ID: XYZ001***	***ERN: 0***
Level	***Field***	***Date***
Organizational Instance	**Organizational Instance Record**	0
	Original Start Date	February 2, 2012 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to enter Bobby's start date at company XYZ.
	Last Start Date	January 01, 2017

Bobby Singh	***Empl ID: XYZ001***	***ERN: 0***
Level	***Field***	***Date***
	First Start Date **Note:** This is the hire date used in all reports tracking hires.	January 01, 2017
	Termination Date	blank
	Org Instance Service Date	January 02, 2017 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to the date from which the company calculates service for acquired employees.
Organizational Assignment	**Last Assignment Start Date**	January 01, 2017
	First Assignment Start	January 01, 2017
	Assignment End Date	blank

From June 3, 2017 to September 10, 2017, Bobby has an additional assignment with the company. The HR administrator uses the action of *ADL* when creating the additional assignment so the system does not treat the new job data record as a separate instance with it's own hire date. The fields on the Employment Data page for the new assignment's job data record have the following values:

Bobby Singh	***Empl ID: XYZ001***	***ERN: 1***
Level	***Field***	***Date***
Organizational Instance	**Organizational Instance Record**	0
	Original Start Date	February 2, 2012
	Last Start Date	January 01, 2017
	First Start Date	January 01, 2017

Bobby Singh	***Empl ID: XYZ001***	***ERN: 1***
Level	***Field***	***Date***
	Termination Date	blank
	Org Instance Service Date	January 02, 2017
Organizational Assignment	**Last Assignment Start Date**	June 3, 2017
	First Assignment Start	June 3, 2017
	Assignment End Date	September 10, 2017

The organizational instance dates come from the original, controlling instance and cannot be changed on the Employment Data page for the non-controlling instance.

On September 15, 2017, Bobby takes on a new job with company ABC. The HR administrator creates a new employment instance and uses the action of *HIR* when creating the instance. The fields on the Employment Data page for the new job have the following values:

Bobby Singh	***EmplID: XYZ001***	***ERN: 2***
Level	***Field***	***Date***
Organizational Instance	**Organizational Instance Record**	2 **Note:** Notice that the organizational instance record number does not follow in sequence with Bobby's other instance, but that it matches the ERN of the job data record created under the new instance.
	Original Start Date	September 15, 2017
	Last Start Date	September 15, 2017
	First Start Date	September 15, 2017
	Termination Date	blank

Bobby Singh	***EmplID: XYZ001***	***ERN: 2***
Level	***Field***	***Date***
	Org Instance Service Date	September 15, 2017
Organizational Assignment	**Last Assignment Start Date**	September 15, 2017
	First Assignment Start	September 15, 2017
	Assignment End Date	blank

This organizational instance is completely separate from the first organizational instance and Bobby is treated as a new hire, as reflected in his original start date and service date. A company with different business rules may choose to acknowledge his past service for this instance, but company ABC does not and, because the two instances are separate, it doesn't have to.

Bobby is offered an additional assignment with the second job starting on January 14, 2018 and so he tenders his resignation for his original job, effective January 15, 2018. The fields on the Employment Data page for the first organizational instance have the following values:

Bobby Singh	***Empl ID: XYZ001***	***ERN: 0***
Level	***Field***	***Date***
Organizational Instance	**Organizational Instance Record**	0
	Original Start Date	February 2, 2012
	Last Start Date	January 1, 2017
	First Start Date	January 1, 2017
	Termination Date	January 15, 2018
	Org Instance Service Date	January 2, 2017
Organizational Assignment	**Last Assignment Start Date**	January 1, 2017
	First Assignment Start	January 1, 2017

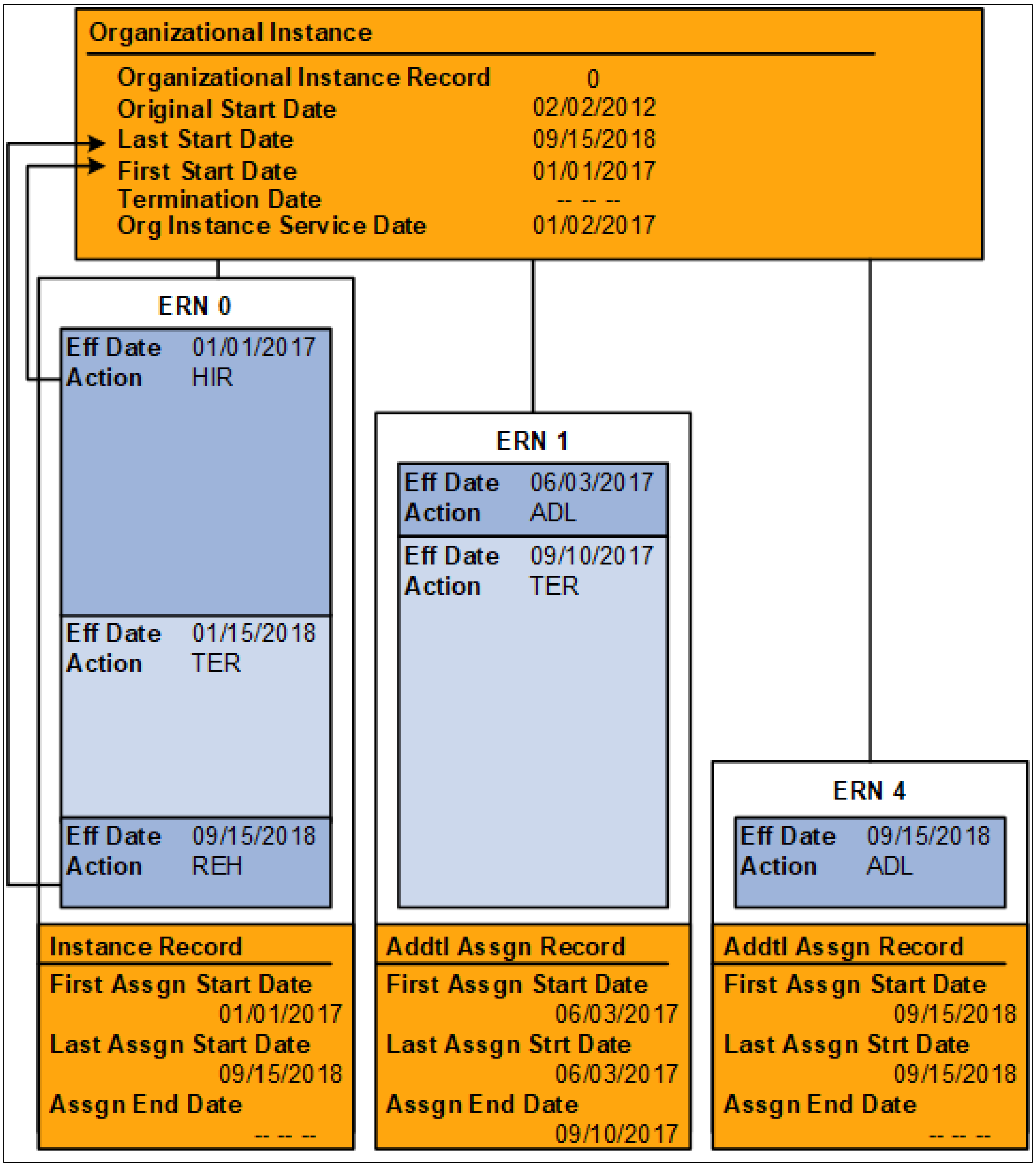
Bobby Singh	***Empl ID: XYZ001***	***ERN: 0***
Level	***Field***	***Date***
	Assignment End Date	January 15, 2018

The fields on the Employment Data page for the new assignment under the second organizational instance have the following values:

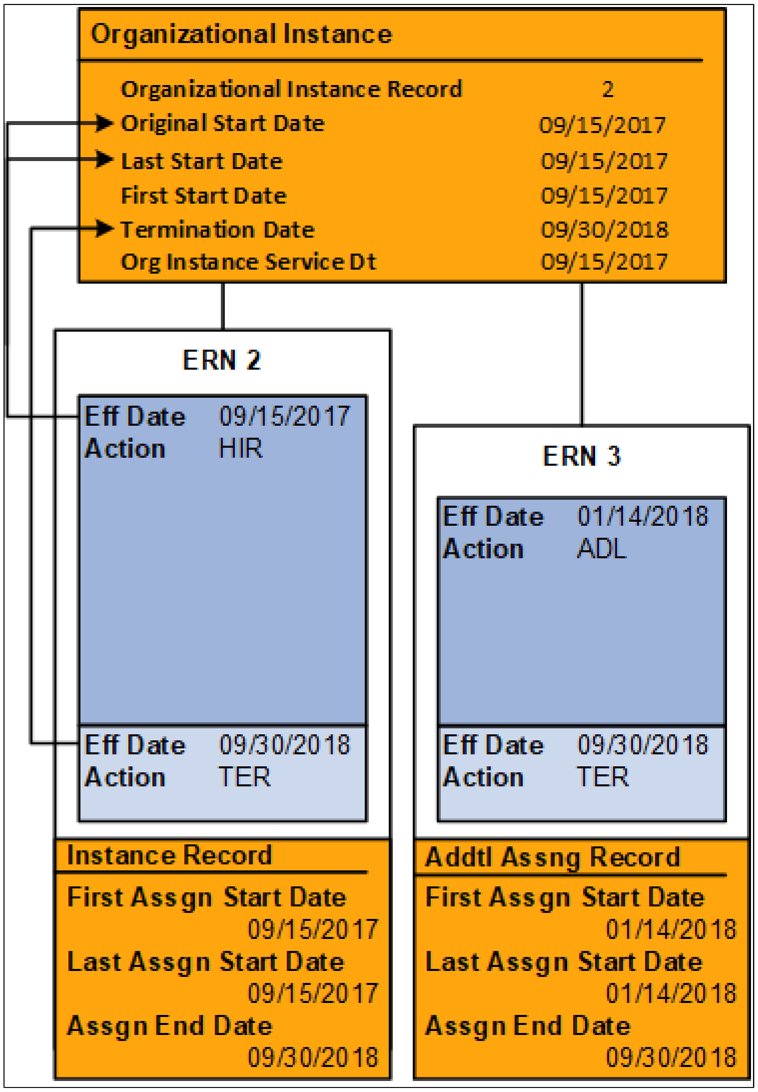
Bobby Singh	***Empl ID: XYZ001***	***ERN: 3***
Level	***Field***	***Date***
Organizational Instance	**Organizational Instance Record**	2
	Original Start Date	September 15, 2017
	Last Start Date	September 15, 2017
	First Start Date	September 15, 2017
	Termination Date	blank
	Org Instance Service Date	September 15, 2017
Organizational Assignment	**Last Assignment Start Date**	January 14, 2018
	First Assignment Start	January 14, 2018
	Assignment End Date	blank

Finally, the division in which Bobby has worked the two jobs in his second organizational instance closes, terminating both the controlling instance and, by association, the assignment effective September 30, 2018 and Bobby is rehired into his original job with a new, additional job on the side, effective September 15, 2018.

The following graphic illustrates Bobby's organizational instance record 0 and assignments:



The following graphic illustrates Bobby's organizational instance record 1 and assignments:



Notice that all of the instance dates come from the controlling assignment and that the termination date is refreshed when Bobby is rehired.

Differences Between the Add Employment Instance, Add Contingent Worker Instance, and Add POI Instance Components

The Add Contingent Worker Instance and Add POI Instance components are almost identical to the Add Employment Instance component with the following exceptions:

Page	***Add Employment Instance Fields***	***Add Contingent Worker Instance Fields***	***Add POI Instance Fields***
Work Location	The default value for the Action field is *Hire*	The default value for the Action field is *Add Contingent Worker*	The default value for the Action field is *Add Person of Interest*

Page	***Add Employment Instance Fields***	***Add Contingent Worker Instance Fields***	***Add POI Instance Fields***
Work Location	Payroll Status	Job Status	Job Status
Payroll	Employee Type	Pay Type	Pay Type
Employment Information		Provider ID	Provider ID

Security Considerations for Users Managing Employees and Contingent Workers

PeopleSoft Human Resources enables human resources administrators to create job records for people in departments that they can't access for updates. This enables them to transfer workers from one department to another.

If you want to prevent administrators from creating job records for people in departments to which they don't have access, the system contains an optional view (DEPT_TBL_ACCESS) that shows only the department IDs. The administrator can access the view based on user security. To use this view, update the JOB record in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

Managing Job Data When You Use the Manage Positions Business Process

If you drive part or all of PeopleSoft Human Resources by position, the process of adding a new job data record is somewhat different from the one that is described in these topics. You still enter some data on the pages that are described in these topics, but because you've already set up most job-related data on the Position Data component (POSITION_DATA), the system inserts default data automatically in many fields.

Full Position Management	***Partial Position Management***
Position-related fields are unavailable for entry in several Administer Workforce pages. When you select a position number for the person in the Position Number field, the system updates the position-related fields with the values associated with the position in the Position Data component.	The position-related fields are available for entry until you enter a position number in the Position Number field and move out of the field. The system updates the position-related fields with the values associated with the position in the Position Data component and makes them unavailable for entry.

Adding Versus Updating Job Records

After you set up job records for a member of the workforce, you can enter more data, build a comprehensive history of the person's career with the organization, and support workforce-related planning and decision-making for all areas of the organization.

The pages that you use when you add an organizational instance are the same ones that you use later to update existing job data records but are contained on different components. Use the Job Data component to update job data information.

Warning! PeopleSoft can't guarantee the results if you use the Add Employment Instance, Add Contingent Worker Instance, Add POI Instance, or Add Additional Assignment components to modify existing data. Use these components only when creating a new organizational instance.

See Understanding the Process of Updating Person and Job Information.

See Understanding the Administering PAR System.

(JPN) Assigning Internal Identification Numbers

This feature enables you to assign to a person's job record identification numbers that have some meaning to the organization. For example, the third digit of an internal ID may indicate employment type; the fifth might indicate work location; and the sixth, job type. You can store a standard ID, which doesn't have meaning and is used for keying the database, and an alternative, meaningful ID that can be changed as the person's circumstances change.

The system assigns IDs to people as you add them to the system in the Personal Information component. The system uses this ID to identify the person in all job records. Enter a meaningful internal ID number for a person in the Internal Empl ID field on the Work Location page to capture information about the person's job situation.

You can update the internal ID each time that you insert a new row into the Job Data component. You can see those changes at a glance on the employee's Job Summary page, and you can search employees by their internal IDs.

The following examples illustrate how a person's internal emplID changes as their relationship to the organization changes, while their standard ID remains constant.

Example 1

In the Internal EmplID column of the following table, the first two numbers indicate the year (2004) that the person is hired as a full-time employee and the 2 in 20091 indicates part-time employment:

Effective Date	***Action***	***Reason***	***ID***	***Internal EmplID***	***Notes***
April 1, 2008	Pay rate change	Merit	45883	94010333	
April 1, 2004	Rehire	New position	45883	94010333	Rehired as full-time employee.
March 31, 2004	Termination		45883	20091	
April 1, 2000	Hire	Temporary assignment	45883	20091	Hired as contingent worker.

Example 2

In the Internal EmplID column of the following table, the first two numbers indicate the year (2000 and 2005) that the person is hired as an employee with the company and the next three numbers indicate the company (014 and 034) that the person is working for:

Effective Date	***Action***	***Reason***	***ID***	***Internal EmplID***	***Notes***
May 31, 2006	Transfer	Completion of intercompany transfer	64096	90014278	Transferred back to home company.
May 8, 2005	Transfer	Intercompany transfer	64096	95034278	Transferred to host company.
April 1, 2000	Hire	New graduates	64096	90014278	Hired as a full time employee.

Prerequisites

Before you add a new organizational instance:

- Set up the Administer Workforce control tables.

  See also the Related Links section that follows.

- Set up the Administer Workforce country-specific control tables.

  See Understanding Country-Specific Table Setup.

- Create personal data records for employees, contingent workers, and POIs.

  See (Classic) Adding a Person.

Related Links

“Understanding Regulatory Regions” (Application Fundamentals)
“Understanding PeopleSoft Security” (Application Fundamentals)
“Setting Up Implementation Defaults” (Application Fundamentals)
“Understanding Language Support in PeopleSoft” (Application Fundamentals)
“Setting Up Person of Interest Types” (Application Fundamentals)
Defining Personnel Actions and Reasons
“Defining Citizen Status Codes” (Application Fundamentals)
“Defining Job Subfunction and Job Function Codes” (Application Fundamentals)
“Setting Up Federal HCM Control Tables” (Application Fundamentals)
“Understanding Bank and Bank Branch Setup” (Application Fundamentals)
“Understanding Local Country Functionality Setup” (Application Fundamentals)

(Classic) Adding Organizational Instances

These topics list common elements and discuss how to add organizational instances for people [employees, contingent workers, and person's of interest (POIs)] using the classic pages.

See Adding Additional Assignments.

Pages Used to Add Organizational Instances Using Classic

Page Name	***Definition Name***	***Usage***
Work Location Page	JOB_DATA1	Enter position and location information for a person's job, including the regulatory region, company, department, and location.
Job Information Page	JOB_DATA_JOBCODE	Enter information about a person's job, including status, employee class, shift, or standard hours.
Current Incumbents Page	POSN_INCUM_DAT_SEC	View the incumbents for a reports to position.
Job Labor Page	JOB_LABOR	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll Page	JOB_DATA2	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Job Data - Compensation page.
Job Data - Salary Plan Page	JOB_DATA_SALPLAN	Enter information about a person's salary plan.
Compensation Page	JOB_DATA3	Enter compensation information.
Contract Change Prorate Options Page	JOB_CNT_CHG_SEC	Choose how to handle contract pay when there is a change to the contract amount.
Employment Information Page	EMPLOYMENT_DTA1	Enter optional data, such as a worker's business title.
Job Earnings Distribution Page	JOB_DATA_ERNDIST	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Page Name	***Definition Name***	***Usage***
Benefit Program Participation Page	JOB_DATA_BENPRG	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.
Person Checklist Page	PERSON_CHECKLIST	Ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.
Person Applicant Information Page	PERS_APPL_INFO	Define applicant referral information.
Person Assignment Checklist Page	EMPLOYEE_CHECKLIST	To ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Note: The Job Search (HC_HR_JOB_DATA) search index supports real time indexing (RTI) with PeopleTools version 8.59.07 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, "Administering Real Time Indexing."

Common Elements Used to Add Organizational Instances for Employees, Contingent Workers, and POIs

Field or Control	***Description***
Go To Row	Click icon to enter a date or row number in which you would like to view.
Benefits Program Participation	Click to Access the Benefit Program Participation page.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.
Employment Data	Click to access the Employee Information page.
Earnings Distribution	Click to access the Job Earnings Distribution page.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.

Field or Control	*Description*
Festive Advance Eligible From	Select the date on which the person becomes eligible for the selected festive advance pay program.
Festive Advance Pay Program	Select the festive advance pay program for the person.
Job Data	Click to access the Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Job Data - Compensation pages.
Military Status	Select the person's current military status.
Owns 5% (Or More) of Company	Select if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing – 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Human Resources.
Regulatory Region	Select the regulatory region.
Religion	Select the religion. You set up religion on the Religions page. **Note:** (AUS and NZL) Set this field to *Not Applicable.*
Security Clearance	If the person receives a security clearance, enter the level of clearance: *Classified, Secret,* or *Top Secret.*

Related Links

Understanding U.S. Federal Hiring
Understanding Additional Worker Data
Understanding the Process of Updating Person and Job Information

Work Location Page

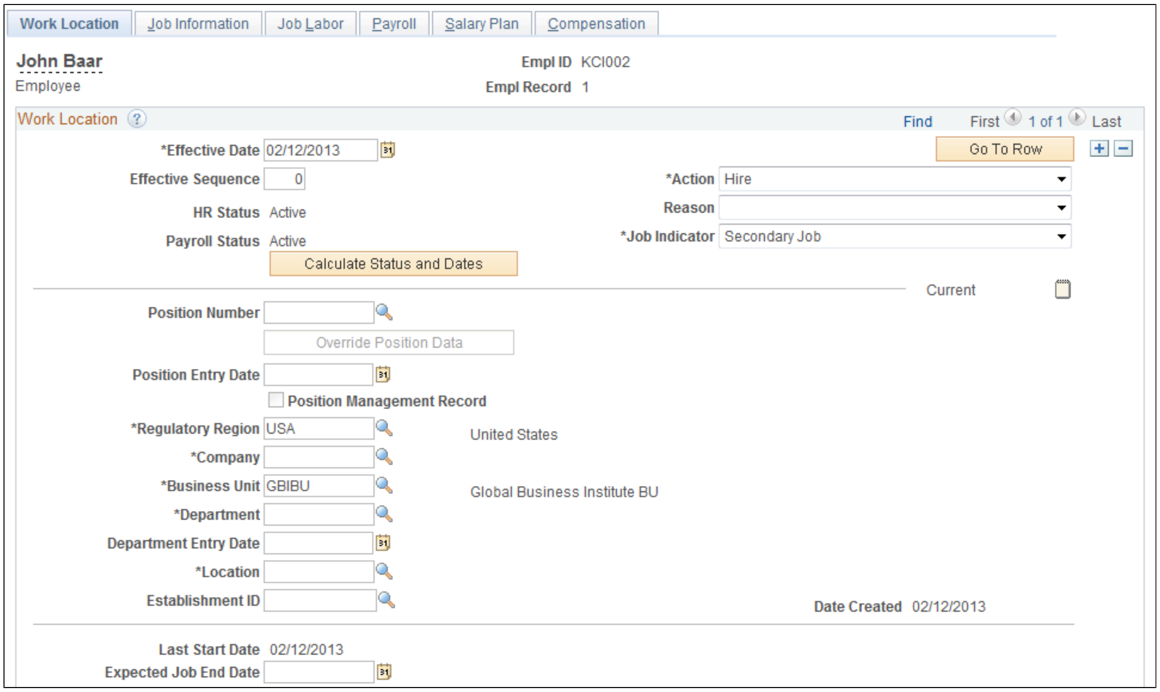
Use the Work Location page (JOB_DATA1) to enter position and location information for a person's job, including the regulatory region, company, department, and location.

Navigation:

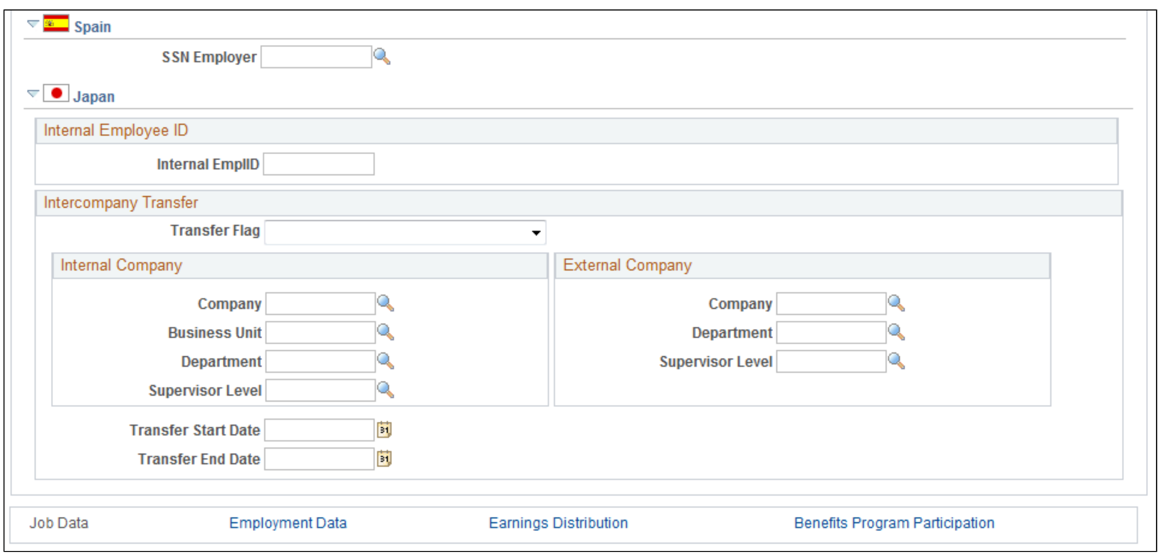
- **Workforce Administration** > **Job Information** > **Add Employment Instance** > **Work Location**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Employment Instance** > **Work Location**
- **Workforce Administration** > **Job Information** > **Add Contingent Worker Instance** > **Work Location**

- **Workforce Administration > Personal Information > Organizational Relationships > New Contingent Worker Instance > Work Location**

This example illustrates the fields and controls on the Work Location page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Work Location page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Military Service	Select the military service in which the person is serving. Displays when the **Military** check box is selected on the Installation Table. This field is available if you are adding a new Job Data record, when you are not adding a new Job Data record this field is display only.
Effective Date	Enter the effective date. When you add a new instance with the action of *Hire,* the effective date that you enter here becomes the hire and original hire date.
Effective Sequence	Enter a number to track multiple administrative actions that occur on the same day. The default value is *0,* the correct number for new instances.
Action and **Reason**	Select the action requiring you to create or modify this record. The system displays a default value when you create a new employment, contingent worker, or POI instance. Reason codes are associated with the action you select. **Note:** During data conversion into the PeopleSoft system for new customers, it may be appropriate to correct the default action value, such as *Hire,* to a value that reflects the person's current information, but changing the Action code for the first row of job data is not otherwise appropriate.
HR Status	Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.
Payroll Status or **Job Status**	The page displays the **Payroll Status** text for employee employment instances. Displays the payroll status of the current job record. Some changes that you make to this field trigger Retro Pay or Final Check processing. A Retro Pay Request is triggered by any payroll status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee. A Final Check Request is triggered by any payroll status change that's based on one of the action or reason codes that are defined in the Final Check Action/Reason table. The page displays the **Job Status** text for contingent worker or POI instances.
Job Indicator	Indicate whether this is the person's primary or secondary job for this organizational relationship. Select *Not Applicable* if those selections don't apply to this job. This field is used to process people with more than one organizational instance in a single organizational relationship.

Field or Control	***Description***
Calculate Status and Dates	Click this button to calculate the person's HR, job, or payroll status and the employment dates so that you can review the changes before you save the component. The system displays this button when you make a change to the effective date or one of the status fields. You do not need to click this button to refresh the status and date fields. The system will refresh these fields when you save the component.
Maintain/View Notes	Click this icon to access the Job Data Notepad page.

Field or Control	***Description***
Position Number	If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the **Position Number** field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry. PeopleSoft Human Resources issues a warning message if you assign a person to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the **Open/Filled** field in the Add/Update Position Info component when you change assignments. When Manage Primary Incumbent is enabled on the “Position Management Installation Page” (PeopleSoft Human Resources Manage Positions), and you made a change to a person’s position, the system issues a warning message about updating the primary incumbent information and recommends reviewing the “Manage Primary Incumbents Page” (PeopleSoft Human Resources Manage Positions). This happens when: • An employee is no longer the primary incumbent due to a job data change or has an HR or Payroll status change. When an employee leaves the position, the system will use the selection method as defined on the Position Management Installation table to assign a new employee as the primary incumbent. • An employee enters a new position and is assigned the primary incumbent role because the position does not currently have a primary incumbent. The system will also send a push notification to the position administrator to review the Manage Primary Incumbents page. For additional information see “Managing Primary Incumbent Information for a Position” (PeopleSoft Human Resources Manage Positions). **Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications. Notifications delivered with HCM Image 47 or later must use Notification Composer. For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Field or Control	*Description*
Position Entry Date	When you enter a position number for this person, the system populates this field with the effective date and this field becomes unavailable for entry. You can override the default by clicking the **Override Position Data** button. If you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date.
Override Position Data and **Use Position Data**	Click **Override Position Data** to enter exceptions to the default position data for this person. This opens up the unavailable fields, including **Job Code** and **Department,** and you can override the entries that are in those fields. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. When you click **Override Position Data,** the button becomes the **Use Position Data** button, and vice versa. This button is available only on new rows of data. ***Warning!*** When a position override is selected for the purpose of setting a supervisor ID as manager instead of using the defaulted reports to value by leaving it blank, be aware that approval processes that use partial position management will attempt to resolve the position's reports to manager from the Position Data table before using the supervisor ID supplied in Job Data. The approval process will route the approval to the reports to manager instead of the supervisor. **Note:** If you override the defaults for position-related data, you must maintain the employee data manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless you click **Use Position Data.**
Position Management Record	The system selects this check box when you make changes to fields in the Add/Update Position Info component that initiate a system update of fields here. A selected check box indicates that the system inserts a data row on the Job Data pages.
Regulatory Region	If you have specified a regulatory region for the position you associated with this person, the system enters a default regulatory region and this field becomes unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position, then the system populates the field by default with the regulatory region for the person, based on your user preferences entered in the Org Defaults by Permission Lst component. You can override the default.

Field or Control	***Description***
Company	If you have specified a company for the position you associated with this person, the system enters a default company and this field becomes unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position and you assigned a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you did not designate a company on the Department table, select a company here. PeopleSoft Payroll for North America requires employees and supported types of persons of interest to be associated with companies that have the correct tax report type, as configured on the Company Table - Tax Details page: • Employees must be associated with companies with tax report type W-2 or W-2PR (W-2 Puerto Rico). • *Other Payee* and *Pension Payee* persons of interest must be associated with companies with tax report type 1099R. • *Student Refund* persons of interest must be associated with companies with tax report type Non-Employees or None. See “(USA) Tax Details Page” (Application Fundamentals).
Business Unit	If you have specified a business unit for the position you associated with this person, the system enters a default business unit and this field becomes unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position, then the system populates the field by default with the business unit for the person, based on your user preferences. You can override the default. The business unit that you assign to the person on this page and the setID functionality in PeopleSoft Human Resources Management affect the way that default values work throughout the PeopleSoft Human Resources system. Your entry in this field controls the departments, locations, job codes, salary plans, and so on that you see on the remaining Job Data component pages.

Field or Control	*Description*
Department	If you have specified a department for the position you associated with this person, the system enters a default department and this field becomes unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position, select the department code for this person. When you leave the field, the system inserts a default supervisor or reports to ID on the Job Information page if you entered a default supervisor or reports to ID for this department in the Department table. The system enters default values for the following fields on the Job Data - Payroll page: **Employee Type** and **Pay Group** (which you associate with a company in the Company table). Depending upon other data setup, the system might enter a default holiday schedule. See "Setting Up Holiday Schedules" (Application Fundamentals). **Note:** Because this page can contain multiple data rows, the system doesn't always warn you that you must complete the **Department** field. However, if you change data in another field on the page, the system issues a warning and won't let you leave the field until you select a department code.
Department Entry Date	If you have specified a department for the position you associated with this person, the system enters a default department entry date and this field becomes unavailable for entry, unless you click the Override Position Data button. When you leave the **Department** field, the system displays the date on which the person is first assigned to this department. However, if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date.

Field or Control	*Description*
Location	If you have specified a location for the position you associated with this person, the system enters a default location and this field becomes unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position and you assigned a location to a department in the Department table, the system displays the department location, if the default location setID that you define in the Department table matches the control location set ID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code. If you did not designate a location on the Department table, select a location here. **Note:** For workers paid through PeopleSoft Payroll for North America, the location that appears here does not determine the person's primary work state and location that appear on the paysheets. You specify that information by selecting a tax location code on the Job Data - Payroll page.
Establishment ID	Select the person's establishment. Establishments are used for several countries for local regulatory reporting. These reports require that each person be assigned to a single establishment. Establishments in regulatory regions other than USA have a one to one relationship with locations. **Note:** (USA) In the USA regulatory region, there is a many to many relationship between locations and establishments. USA regulatory reports require that you associate an establishment ID with a person at the job level. **Note:** (FRA) For payroll purposes, you must always assign persons to an establishment. If a person is assigned to a position, the system enters the establishment ID that is associated with the position and makes the field unavailable. If you associate a non-French position with a French person, the field remains available for entry.
Date Created	Displays the date on which you enter this record.
Last Start Date	Enter the most recent start date for this organizational instance.

Field or Control	*Description*
Expected Job End Date and **Expected Return Date**	Enter the end date or return date for this job, if known. If you don't know the date initially, you can enter it later. If this job is a temporary assignment and you do not enter a date in the **Expected Job End Date** field, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold. The system displays the day before the termination effective date as the termination date.
End Job Automatically	Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if the organization uses this feature. You can use this feature only if the **Automatic Job Termination** check box is selected on the Installation Table - Product Specific page.
Termination Date, Last Date Worked, and **Override Last Date Worked**	The system displays the day before the termination effective date as the termination date and the date last worked. These fields display when you have indicated an action that will inactivate or suspend a job. If you rehire the person, the system deselects these fields. When a person returns from leave, the system deselects only the **Last Date Worked** field. If the date is not accurate, select **Override Last Date Worked** to enter the date.

Military

The Military section is available when military is enabled on the Installation Table. Valid values for the service component and component category of the person depend upon the military service you enter at the top of the Work Location page.

Field or Control	*Description*
Service Component	Indicate the employee's service type for their military service, such as regular, activity reserve, and so forth.
Component Category	Enter a service component category to further define for the service component for this person.

(ESP) Spain

Field or Control	Description
SSN Employer (social security number for employer)	Enter the company SSN, as assigned by the Spanish government, that applies to this person.

(JPN) Japan

Field or Control	Description
Internal EmplID (internal employee ID)	Enter the person's internal ID. You can store an internal emplID if the company uses meaningful employee IDs, and those IDs themselves need to change with certain employee data changes such as employment type changes. Internal EmplIDs also appear on the JPN Job Summary page, and you can search the system by internal EmplID. See Understanding Identification Assignment.

(JPN) Intercompany Transfer

This region enables you to specify intercompany transfer (shukkou) data for Japan. Enter information about the company and department that the person is transferring to or from in the appropriate group box, **Internal Company** or **External Company.** Values for the **External Company** group box are set up on the Set Up Company/Dept Codes and Set Up Supervisor Level Codes pages.

Field or Control	Description
Intercompany Transfer Flag	Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany transfer-related action or action reason codes to check the validity of the entries. Values are: • *Home Company Information:* Select if another company's worker joins the company in an intercompany transfer. • *Host Company Information:* Select if one of the workers is on intercompany transfer to another company. Select the blank value at the top of the list to remove all entries.

Field or Control	*Description*
Company	Select the home or host company. The home or host company ID is a prompt value from the Company component (for internal company transfers) and the Set Up Company/Dept Codes page (for external company transfers).
Business Unit	Select the home or host business unit for internal company transfers only. Your entry in this field controls the Department and Supervisor Level field values in the **Internal Company** group box due to setID functionality for business units.
Department	Select the home or host department. The home or host department ID is a prompt value from the Departments component (for internal company transfers) and the Set Up Company/Dept Codes page (for external company transfers).
Supervisor Level (external supervisor level)	Select the home or host supervisor level. This value is a prompt value from the Supervisor Lvl Table component (for internal company transfers) and the Set Up Supervisor Level Codes page (for external company transfers).
Transfer Start Date	If you enter host data, enter the start date of this intercompany transfer. Don't enter a date if the action is *RET* (retirement) and the reason is *PIT* (permanent intercompany transfer).
Transfer End Date	If you enter host data, enter the expected end date of this intercompany transfer. Don't enter a date if the action is *RET* and the reason is *PIT.* The end date must be equal to or later than the effective date of the worker's current job record.

Related Links

"Defining the Final Check Process" (PeopleSoft Payroll for North America)
Understanding Additional Appointments
Understanding Intercompany Transfer Tracking
Running Job Data Reports
"Understanding PeopleSoft HCM System Data Regulation" (Application Fundamentals)
"Understanding Regulatory Regions" (Application Fundamentals)
"Entering Company Information" (Application Fundamentals)
"Understanding Retro Pay Processing" (PeopleSoft Payroll for North America)

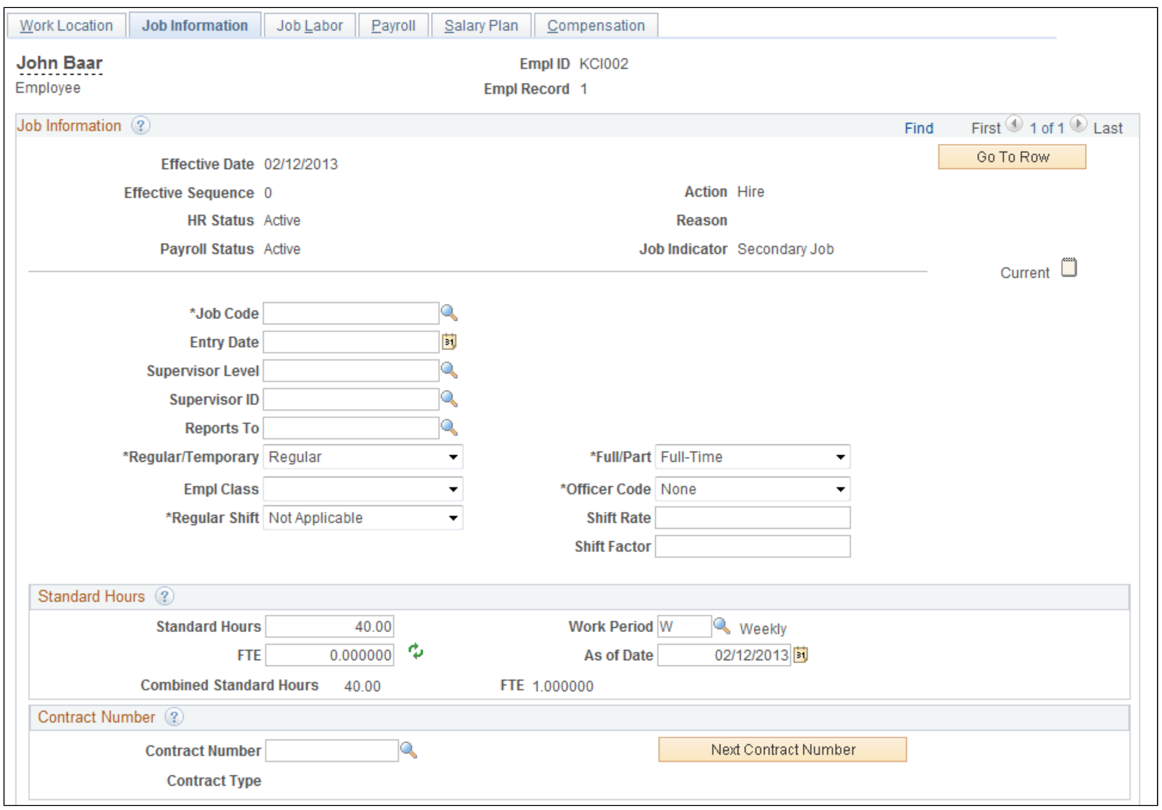
Job Information Page

Use the Job Information page (JOB_DATA_JOBCODE) to enter information about a person's job, including status, employee class, shift, or standard hours.

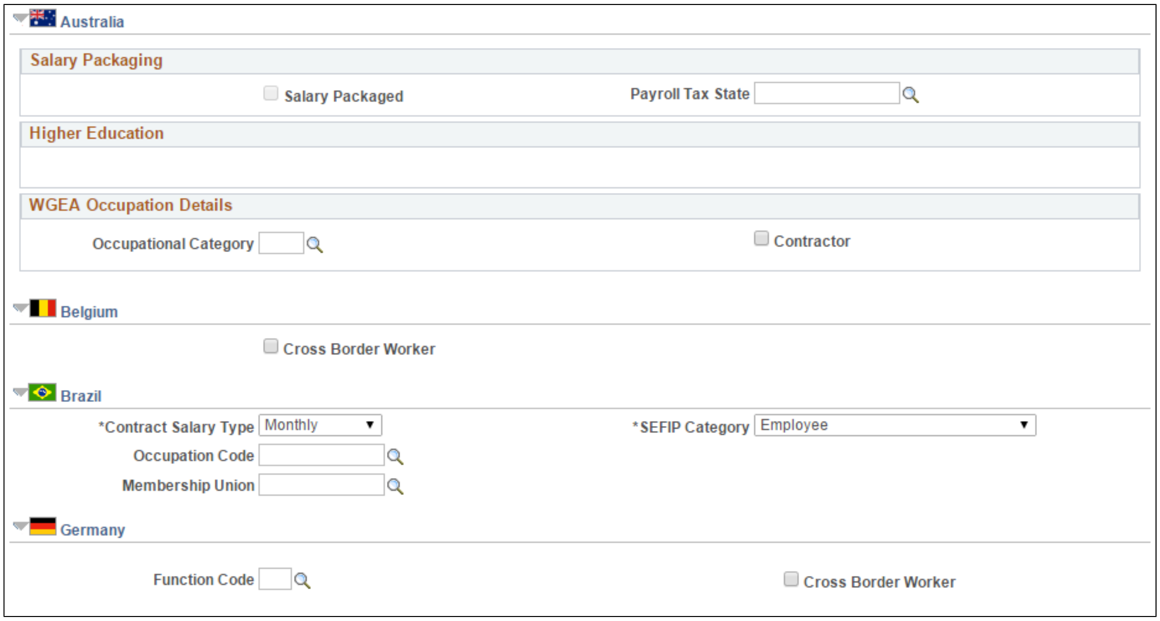
Navigation:

- **Workforce Administration** > **Job Information** > **Add Employment Instance** > **Job Information**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Employment Instance** > **Job Information**
- **Workforce Administration** > **Job Information** > **Add Contingent Worker Instance** > **Job Information**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Contingent Worker Instance** > **Job Information**

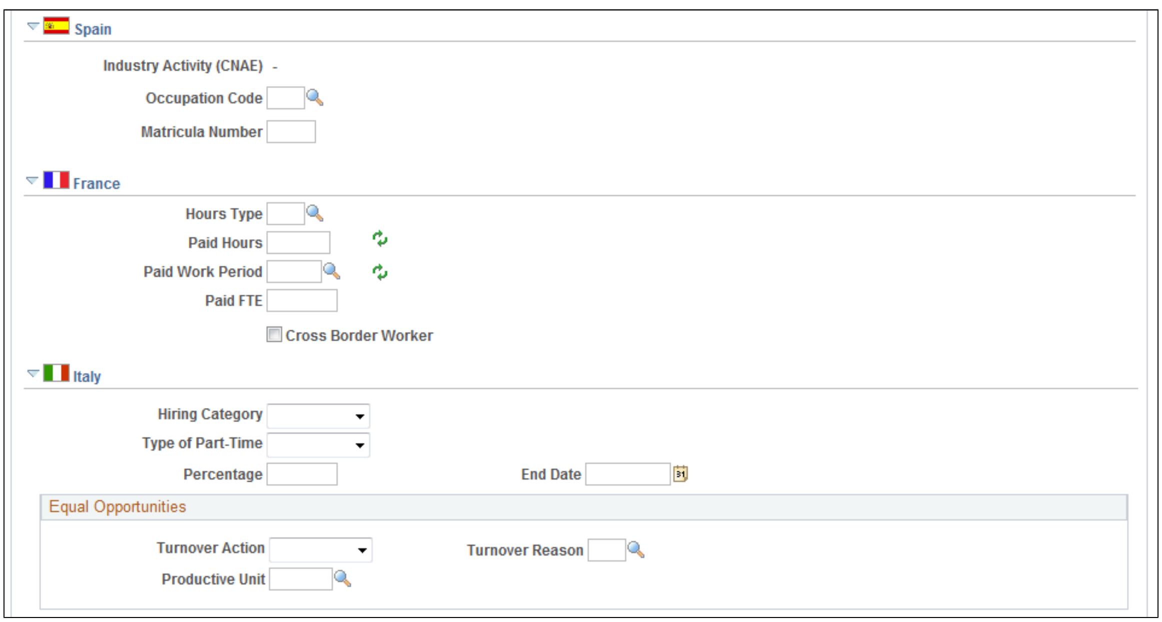
This example illustrates the fields and controls on the Job Information page (1 of 4). You can find definitions for the fields and controls later on this page.



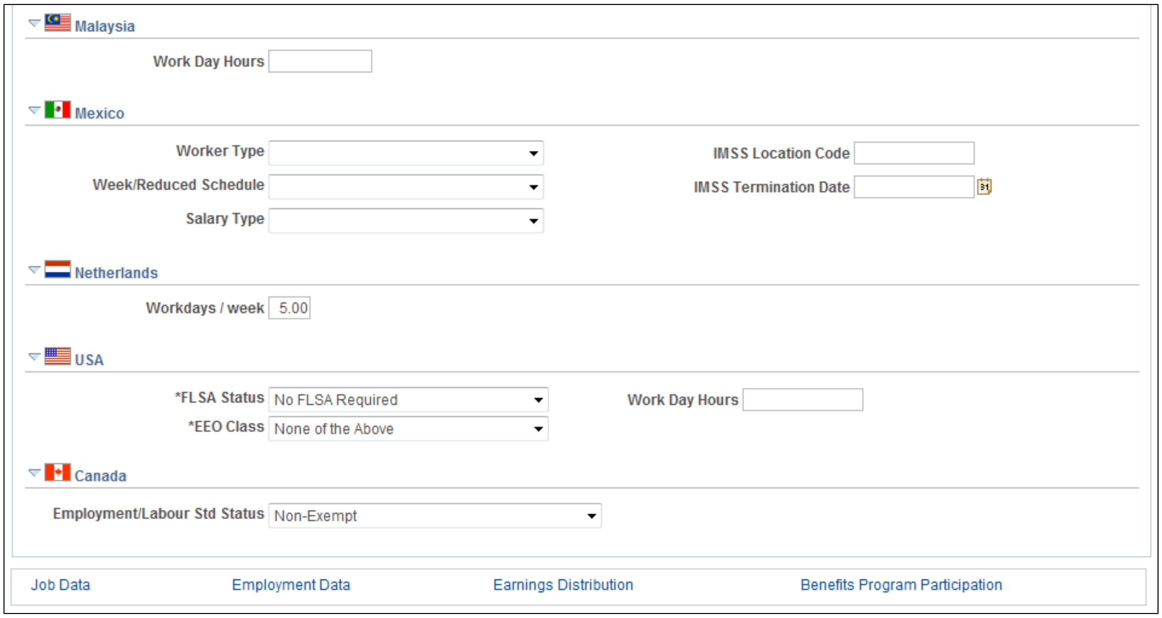
This example illustrates the fields and controls on the Job Information page (2 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Job Information page (3 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Job Information page (4 of 4). You can find definitions for the fields and controls later on this page.



Note: Many values on this page come from the value that you enter in the **Department** field on the Job Data - Work Location page. You can override most of these default values.

Field or Control	*Description*
Job Code	If you have specified a job code for the position you associated with this person, the system enters a default job code and this field becomes unavailable for entry, unless you click the Override Position Data button on the Work Location page. If you haven't assigned the person to a position, select the job code for this person. **Note:** If you are attaching this person to a labor agreement on the Job Labor page and that labor agreement is associated with job codes, you must select a job code that is valid for the labor agreement. PeopleSoft Payroll for North America uses this field to create a pay line on a person's paysheets. The system creates a pay earnings record for each active job code on the person's employment record. See “Job Codes Page” (PeopleSoft Human Resources Manage Labor Administration).

Field or Control	*Description*
Entry Date	When you leave the **Job Code** field, the system displays the date on which the person is first assigned to this job code. However, if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date. If you are using position management, this field is unavailable for entry, unless you click the **Override Position Data** button on the Work Location page.
Supervisor Level	Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier. If you have specified a supervisor level for the position you associated with this person, the system enters a default supervisor level and this field becomes unavailable for entry, unless you click the Override Position Data button. If you did not assigned the person to a position, select the supervisor level code for this person, if applicable. See Defining Additional Employment Setup Data.
Supervisor ID	When using full Position Management, this field is unavailable. The system will use the **Reports To** field, which the position provides by default. When using partial or no Position Management, this field is available, however, the system will not allow you to save the page when there are values in both the **Supervisor ID** and **Reports To** fields. If you want to enter a supervisor ID when using partial Position Management and a person is assigned to a position, click the **Override Position Data** button on the Work Location page to enable the **Reports To** field and remove the value that is provided from the position number. If you have not assigned the person to a position and you assigned a manager ID to a department in the Department table, a default supervisor ID appears. If you did not designate a manager ID on the Department table, enter a supervisor ID here, if applicable. **Note:** Specify the person's department code before you enter a new supervisor ID. If you enter a supervisor ID before you select a department code, the system overrides the ID each time that you enter or change the person's department.

Field or Control	*Description*
Reports To	Displays the position number, title, and name of the manager associated with this position. When the Manage Primary Incumbent functionality is enabled on the "Position Management Installation Page" (PeopleSoft Human Resources Manage Positions), a View Current Incumbents link will appear instead of the Reports To manager's name. If you have specified a reports to number for the position you associated with this person, the system enters the default value and this field is unavailable for entry, unless you click the **Override Position Data** button. ***Warning!*** When a position override is selected for the purpose of setting a supervisor ID as manager instead of using the defaulted reports to value by leaving it blank, be aware that approval processes that use partial position management will attempt to resolve the position's reports to manager from the Position Data table before using the supervisor ID supplied in Job Data. The approval process will route the approval to the reports to manager instead of the supervisor. If you have not assigned the person to a position and you assigned a reports to ID to a department in the Department table, a default reports to ID appears. If you did not designate a reports to ID on the Department table, enter a reports to ID here, if applicable.
View Current Incumbent link	This link appears when you have enabled Manage Primary Incumbents on the "Position Management Installation Page" (PeopleSoft Human Resources Manage Positions), the **Reports To** field is populated, and incumbents have been assigned to this Reports To position. Click this link to access the Current Incumbents Page to view the incumbents for the Reports To position. When there are no incumbents assigned to this Reports To position, the page will issue a message stating that there are no current incumbents to view.
Regular/Temporary	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position, the system displays the default value from the Job Code Table. You can override this value.

Field or Control	*Description*
Full/Part	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position, indicate whether the worker is full-time or part-time. **Note:** The Manage Base Benefits business process uses the values that you select in the **Regular/Temporary** and **Full/ Part** fields to determine eligibility requirements. PeopleSoft Payroll for North America uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, Payroll for North America prorates the holiday hours for part-time workers. However, proration is based on the standard hours for the worker, not for the pay group.
Empl Class (employee class)	Select an employee class, which provides another method of grouping workers. Examples may include *Assignee, Expatriate,* or *Intern.* Employee classes are included in the Employee Labor Classification table. To override, access this page in correction mode. The list of values depends on the regulatory region that is specified on the Work Location page and the setID values entered in the Employee Labor Classification component. **Note:** (CHN) Select the **Regular/Temporary** field value first and then select the corresponding **Empl Class** value to enable the company to sort employees correctly. If you select the **Regular/Temporary** value of *Regular,* then you should leave the**Empl Class** field empty. Normal global payroll taxes will be calculated for the employee. (If you select *Regular* for **Regular/Temporary** and *Instructor* for Empl Class, you can still save the data, but the company will be unable to sort employees correctly or calculate the correct employee number.) If you select *Temporary* for the **Regular/Temporary** value, then you can select any of the **Empl Class** values *(Consultant, Contractor, Instructor, Intern,* or *Others)*. Remuneration services tax will be calculated in this case. (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of workers. If the organization submits this report, you must use the required employee classes for the report to work correctly. (JPN) Select *Host ICT* (Hosting Intercompany Transfer) to flag those workers that are hired on an intercompany transfer basis when the company is the host company. See “Understanding U.K. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements).

Field or Control	*Description*
Officer Code	Identify highly compensated workers for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is *None.*
Regular Shift	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button. If the worker is working shifts, select the appropriate shift. If the worker doesn't work shifts, leave the **Shift Rate** and **Factor** fields blank. The default value is *N/A* (not applicable).
Shift Rate and**Shift Factor**	If you selected the **Specified at Employee level** option on the Shift table, enter the shift differential for this worker and job. Enter the shift differential as a rate (flat amount), a factor (percentage), or both. Use the first field to enter a flat amount and the second field to enter a percentage. **Note:** To apply the same shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. If you specify the differential on the Shift table, the system does not use shift rate information from Job data. See “Understanding HCM Information Used in the Payroll Process” (PeopleSoft Payroll for North America) and “Understanding Tables That Support the Payroll Process” (PeopleSoft Payroll for North America).
Classified Ind (classified indicator)	Associate the position with an FTE Classification (full time equivalents classification) that you established on the Department Budget FTE page. This field is visible only for departments that have been set up to use commitment accounting. Departments are configured to use commitment accounting on the Comm. Acctg and EG page in the Department component.
Duties Type	For jobs where the action or reason is temporary assignment, select the type of duties for the temporary assignment from the Temporary Duties Type table. You can use this feature only if the **Automatic Job Suspension** check box is selected on the Installation Table - Product Specific page.
Encumbrance Override	Select to override encumbrance processing at the job level when you create a new organizational instance or add a concurrent job for a worker date if the department uses Commitment Accounting.

Standard Hours

The standard hours fields defaults from the position number you associated with this person, and these fields are unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position or click the Override Position Data and change the job code, then the system populates the fields by default from the job code. You can override the defaults.

Field or Control	***Description***
Standard Hours	Displays by default the standard hours for the worker. Change the default value, if required.
Work Period	Select a standard work period, the time period during which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full-time equivalency.
FTE (full-time equivalency)	Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.
Combined Std Hours/FTE (combined standard hours/full-time equivalent)	Displays the total standard hours that are assigned to the worker for all active jobs combined and the worker's total FTE status for all active jobs combined. For example, if a worker holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the worker's combined FTE is .85 *(.5 + .35)*. You can't change or delete this information. **Note:** The combined FTE that appears here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of a worker's individual FTEs from active jobs only.

Contract Number

Field or Control	*Description*
Contract Number or **Next Contract Number**	Select the worker's contract number or click the **Next Contract Number** to associate a contract with a person, if applicable. **Note:** Existing contracts that have a value in the **End Date** field (the system displays this field on the prompt page) are not valid selections. The system populates the contract end date when the contract is terminated. If you know when the contract will end, enter the date in the Contract Expected End Date on the Contract Status/Content page. **Note:** (ESP and FRA) This is a required field when the action is hire, rehire, or transfer for workers who belong to a Spanish or French regulatory region. View the prompt values in the **Contract Number** field to view all active contracts for that worker. If the worker has no active contracts in the system, click the **Next Contract Number** button; the system assigns a new contract number. When you save, the system warns you that you must update the contract information for the new contract number that is automatically created for this worker. Access the Contract Data component using the new contract number, and make the necessary updates. **Note:** (BRA) When you enter a contract number and saves the page, a PeopleCode is run to populate the contract type on the (BRA) Additional Contract Data Page for the worker based on these scenarios: If a contract number is specified and the contract type is populated, the system takes the contract type and identifies the associated legal contract type that is set up on the Legal Contract Type Page of the Legal Contract Type component. If no contract number is specified, or if a contract number is specified but the contract type is not available, the system takes the employee class from the Job Information page, and identifies the associated legal contract type that is set up on the By Employee Classification Page of the Legal Contract Type component. The identified legal contract type is then populated to the Additional Contract Data page as the contract type.
Contract Type	Displays the contract type that is associated with the contract number that you select.

See Tracking Workforce Contracts.

Military

The Military check box must be selected on the Installation Table to view this section.

Information in this military section enables you to define an occupational group at the service member level to quickly identify which service members actually have specialty areas, such as a physician that is an orthopedic surgeon. Additionally, Australia Defense also uses job families, functions and subfunctions to derive pay for the service member. In Canada, a member with a particular specialty, for example, a light-wing pilot, may be paid an additional allowance. These values do not come from the job code.

Field or Control	*Description*
Job Family	Select a job family to categorize the job for this service member.
Function	Select the code that best categorizes the job for this person by function, such as administrative, legal, or management. If you change the job family after entering the function, this field will be deselected.
Subfunction	Enter a subfunction to further categorize the job function. If you change the job family for function after entering the subfunction, this field will be deselected.

(AUS) Australia - Salary Packaging

Field or Control	*Description*
Salary Packaged	Select to transfer the worker's salary packaging information into the job data component.
Payroll Tax State	Enter the code for the state in which the worker is paid and for which the organization pays the payroll tax.

(AUS) Australia - Higher Education

These fields are required for DETYA reporting and appear only if the **Australian Education & Government** check box is selected on the Installation Table - Country Specific page.

Field or Control	*Description*
Annual Contact Hours	Enter the calculated annual contact hours for this worker.

Field or Control	***Description***
Type of Appointment and **Appointment Duration**	Select the type of appointment. If you select *Limited,* enter an appointment duration.
Teaching Weeks	Enter the number of teaching weeks for this worker.
Job Classification	Select the DETYA job classification.

(AUS) Australia – WGEA Occupational Details

Field or Control	***Description***
Occupational Category	Select the occupational category. This field enables you to override a worker's occupational category with another one that is different from the occupation category configured through the ASCO code and job code.
Contractor	Select the check box if the worker is a contractor.

(BEL) Belgium

Field or Control	***Description***
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.

(BRA) Brazil

Field or Control	***Description***
Contract Salary Type	Enter the contractual salary code for RAIS.
SEFIP Category	Select the worker category for SEFIP.
Occupation Code	Specify the occupation code based on the Brazilian Code of Occupation (CBO). This is required for Brazilian workers. Brazilian occupation codes are defined on the CBO Codes BRA Page.

Field or Control	*Description*
Membership Union	Enter the union code that details how to calculate and pay the worker's monthly union dues.

(DEU) Germany

Field or Control	*Description*
Function Code	Select the appropriate code for the worker.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.

(ESP) Spain

Field or Control	*Description*
Industrial Activity	Displays the social security number (SSN) employer assigned to the employee. This industrial activity code defines the percent to calculate contributions for work-related accidents and occupational disease
Occupation Code	Assign a specific occupational code from the list provided by Social Security if the industry activity done by the employee doesn't match the general activity defined for the social security number he is assigned to. This occupational code determines the percent to calculate contributions for work-related accidents and occupational disease. **Note:** This information replaces the social security risk code.
Matricula Number and **Next Matricula Number**	Enter or click the button to enter a matricula number. The Spanish government requires every worker to have a matricula number. Employers use this number to compile a matricula book that reports workplace statistics to the government. You maintain matricula numbers in the Location table.

(FRA) France

Field or Control	*Description*
Hours Type	Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours. This field is for information only. No payroll calculation is based on information in this field.

Hours Type	*Description*
3 × 8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can continue around the clock. The production workers are split into three groups with each group working one after the other, eight hours a day. Periodically the workers shift to another group. Shift workers who are working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints to a worker's personal life, these workers are often paid a shift bonus.
2 × 8	A shift work pattern that is similar to the 3 × 8 option, except that there are two work shifts instead of three.
STA	Work hours follow a regular pattern using the job's standard hours as indicated on the Job Date - Job Information page.
IND	Work hours follow a regular pattern that is different from the company's default standard hours. Indicate the number of hours in the **Standard Hours** field on the Job Date - Job Information page.

Field or Control	*Description*
Paid Hours	Displays the number of hours for which the worker is paid. The system enters the value that is defined for standard hours (defined for the job code for this worker) as the default in this field only for workers who are part of a French regulatory region.

Field or Control	***Description***
Paid Work Period	Select the period in which the worker should work. If the regulatory region to which the worker is assigned is French, the system inserts the work period that is defined on the Job Code Table - Job Code Profile page as the default value. Values are: *A:* Annual *B:* Biweekly *C:* Contract *D:* Daily *F:* Every four weeks *M:* Monthly *Q:* Quarterly *S:* Semimonthly *W:* Weekly
Paid FTE	Displays the ratio of the paid hours to the standard hours reference for workers whose regulatory region is French. The system calculates and inserts a value for this field.

(ITA) Italy

Field or Control	***Description***
Hiring Category	If the worker is hired from a special hiring category, indicate the category here. Values are: *CIG, Mobility, Protected, Unemployed,* and *Weak Wrap.*
Type of Part-Time	If the worker is part-time, indicate the type. Values are: *Cyclic* (employed only for a certain period of the year, either full or reduced hours), *Horizontal* (employed five days per week with fewer than full-time hours), and *Vertical* (employed full-time on certain days but fewer than 40 hours per week).
Percentage	Define the percentage of part-time.

Field or Control	***Description***
Turnover Action	Select the turnover action (for example, *Layoff* or *Termination)* causing the change in the worker's job. The value that you enter appears in the Equal Opportunities reports.
Turnover Reason	Select the reason for the turnover action. The value that you enter appears in the Equal Opportunities reports.
Productive Unit	Select the worker's productive unit. You use productive units to group workers based on agreements between unions and employers.

(MYS) Malaysia

Field or Control	***Description***
Work Day Hours	Enter the standard workday hours that are used for payroll and leave calculations.

(MEX) Mexico

It is common in Mexico to have two termination dates: the original termination date and the IMSS termination date.

The company must notify IMSS of a worker's termination date five days after the worker leaves. However, there are some exceptions to this rule, such as when a worker is on disability and does not return to the company.

Field or Control	***Description***
Worker Type	Define the person's worker type. Values are: *Construction Eventual, Eventual Worker,* and *Permanent Worker.* This field is used for reporting the type of worker to the SUA.
IMSS Location Code	Specify the location code. This field is used to indicate the location of the worker to the SUA.
Week/Reduction Schedule (reduced weekly schedule)	Specify the reduced work schedule for the worker. Values are: *1 Day per Week, 2 Days per Week, 3 Days per Week, 4 Days per Week, 5 Days per Week, Complete Week,* and *Workday Less than 8 Hours.*

Field or Control	***Description***
IMSS Termination Date	Enter the IMSS termination date.
Salary Type	Select the salary type that the worker receives. Values are: *All Salaries, Fixed Salary, Mixed Salary,* and *Variable Salary.* This field is used for reporting to the IMSS.

(NLD) Netherlands

Field or Control	***Description***
Workdays / week	Enter the average number of working days per week. The default value is *5,* reflecting a full-time job. Enter *0* for standby workers who are only working on demand. You receive a warning if the number of working days is inconsistent with the full- or part-time parameter. **Note:** From January 1, 2006, PeopleSoft Global Payroll for the Netherlands no longer uses this field to calculate social security premiums for part-time workers. For further information refer to the *PeopleSoft Global Payroll for the Netherlands* documentation.

(GBR) UK

The following fields appear only if PeopleSoft Global Payroll for the U.K. is not installed.

Field or Control	***Description***
Tax Code	Enter the worker's tax code for the current tax year.
Tax Basis	Select the basis that is used to calculate the worker's tax.

(USA) United States of America

Field or Control	***Description***
FLSA Status (Fair Labor Standards Act status)	FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration. The FLSA status defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the **Override Position Data** button. If you have not assigned the person to a position or you click the **Override Position Data** button and change the job code, then the system populates the fields by default from the job code. You can override the defaults
Work Day Hours	Enter the workday hours. The workday hours information is used in the FLSA calculation for the basic rate formula.
EEO Class (Equal Employment Opportunity class)	Displays a regulatory status for this job based on the job code that you assign the worker.

(CAN) Canada

Field or Control	***Description***
Employment/Labour Std Status (employment and labour standards status)	Use this field to indicate whether the job is *Exempt* or *Non-Exempt* according to the provincial Employment Standards Act or Labour Standards Act. If you supply a job code but not a position number, the default value comes from the job code, and the field remains editable. If you supply a position number, the default value comes from the position, and the field becomes read-only unless you click the **Override Position Data** button on the Work Location page.

Related Links

PeopleSoft Global Payroll

“Understanding Frequency IDs” (Application Fundamentals)

“Defining Job Subfunction and Job Function Codes” (Application Fundamentals)

“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)

Current Incumbents Page

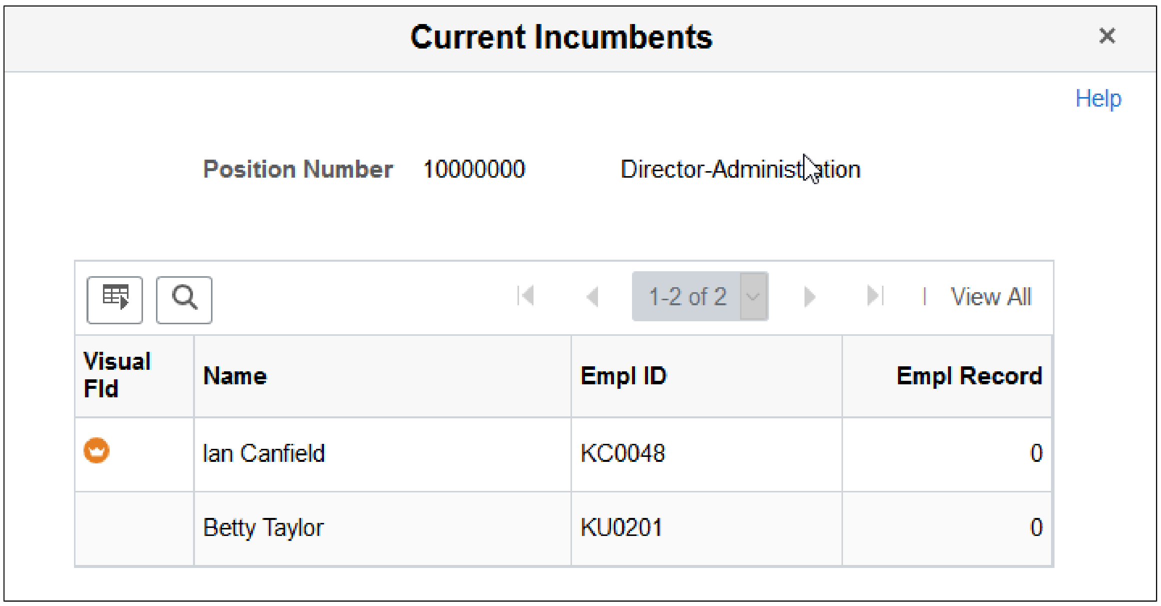
Use the Current Incumbents page (POSN_INCUM_DAT_SEC) to view the incumbents for a reports to position.

Note: This page is available if Manage Primary Incumbent functionality is enabled on the “Position Management Installation Page” (PeopleSoft Human Resources Manage Positions) and incumbents have been defined for the Reports To position.

Navigation:

Click the View Current Incumbents link on the Job Information Page.

This example illustrates the fields and controls on the Current Incumbents page



This page displays the incumbents currently in the reports to position.

Field or Control	***Description***
(Primary Incumbent) icon	Indicates the primary incumbent for this reports to position. **Note:** This icon will display if a primary incumbent has been defined on the “Manage Primary Incumbents Page” (PeopleSoft Human Resources Manage Positions) for this reports to position.

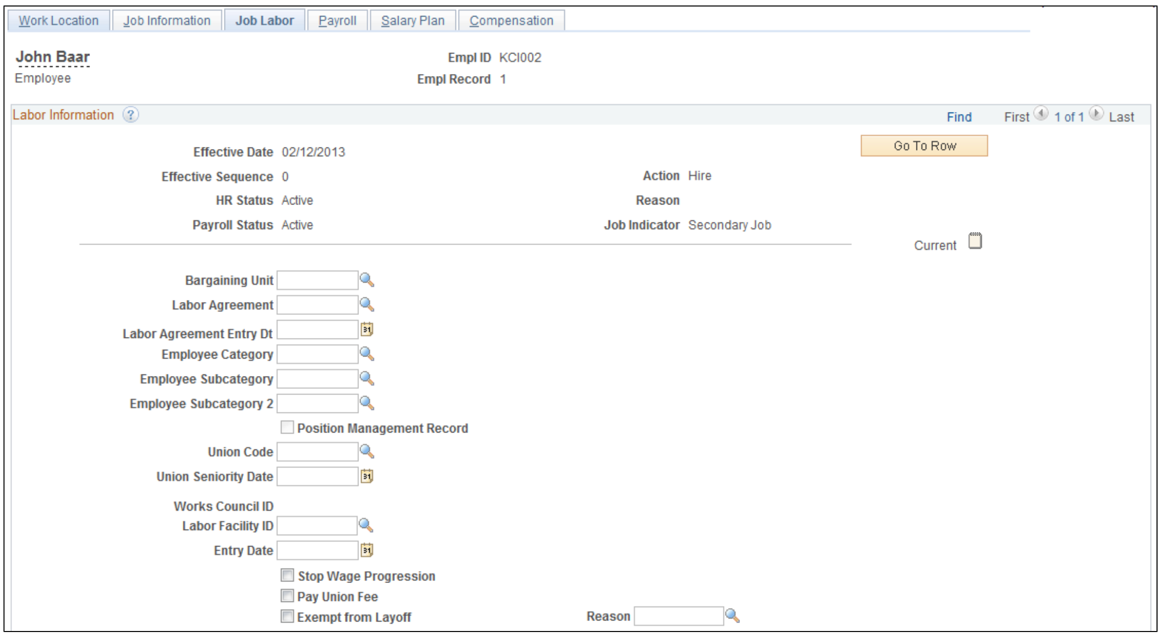
Job Labor Page

Use the Job Labor page (JOB_LABOR) to enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.

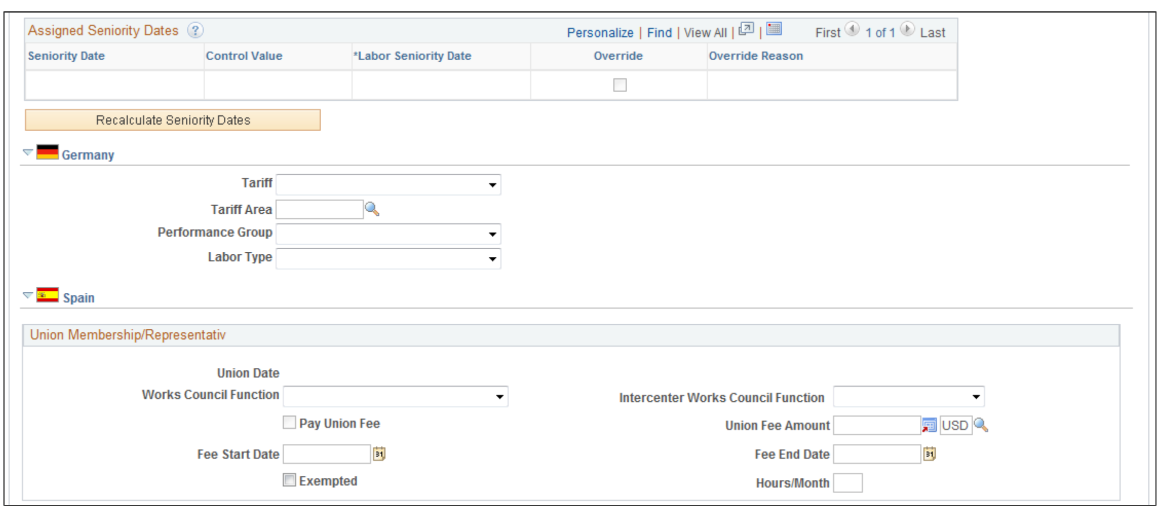
Navigation:

- **Workforce Administration > Job Information > Add Employment Instance > Job Labor**
- **Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance > Job Labor**
- **Workforce Administration > Job Information > Add Contingent Worker Instance > Job Labor**
- **Workforce Administration > Personal Information > Organizational Relationships > New Contingent Worker Instance > Job Labor**

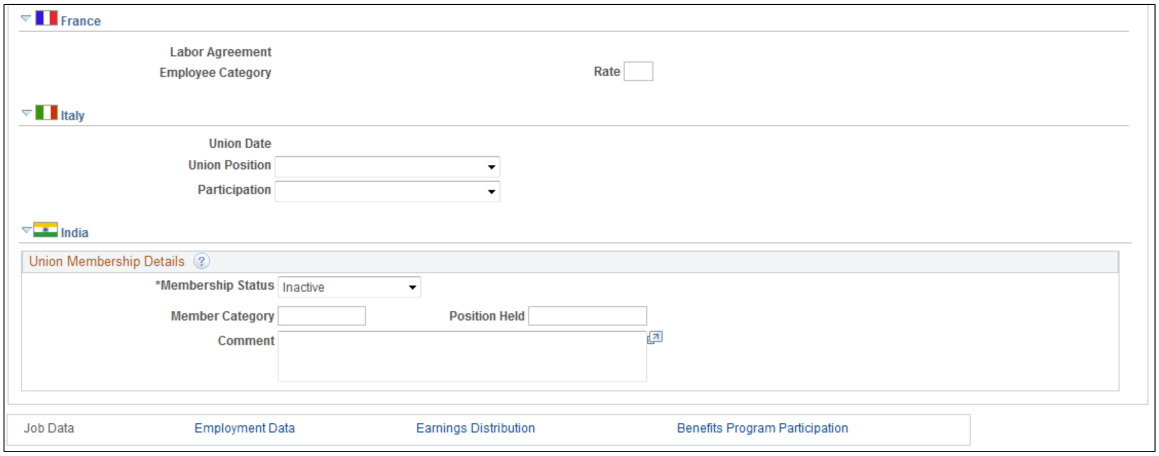
This example illustrates the fields and controls on the Job Labor page (1 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Job Labor page (2 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Job Labor page (3 of 3). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Bargaining Unit	Select a code representing the bargaining unit to which the employee belongs.
Labor Agreement	Specify which labor agreement applies to this worker.
Labor Agreement Entry Dt (labor agreement entry date)	If this worker is part of a national labor agreement, enter the date on which the worker enters the category or subcategory. Also, use this date to track the worker's seniority within the category.
Employee Category	Specify the worker category to which the worker belongs under the labor agreement.
Employee Subcategory	Select the subcategory that applies to the worker. If the employee category that you select for this person contains subcategories, this field appears. **Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.
Employee Subcategory 2	Select the secondary subcategory that applies to this worker. If the subcategory that you select for this person contains secondary subcategories, this field appears. **Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.

Field or Control	Description
Position Management Record	The system selects this check box whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.
Union Code	This field defaults from the position number you associated with a person, and is unavailable for entry, unless you click the Override Position Data button. If the worker belongs to a union, enter the code.
Union Seniority Date	Enter the date on which the worker enters the union.
Works Council ID	Select the ID of the Works Council representing this employee.
Labor Facility ID	Select the facility this worker belongs to.
Entry Date	Enter the date the worker began in the labor facility.
Stop Wage Progression	If the selected job code is associated with a wage progression salary plan, select to stop wage progression for this worker. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and deselect this check box.
Pay Union Fee	Select if a union fee should be paid. The organization can define whether the worker or the employer should pay the fee. This field doesn't affect system processing.
Exempt From Layoff and **Reason**	Select if the worker is exempt from layoff and select a reason for the layoff exemption.

See PeopleSoft Human Resources Manage Labor Administration.

Assigned Seniority Dates

This grid lists the seniority dates associated with the selected labor agreement.

If the seniority date is set up to default from an existing value, the system will populate them. If the dates are set up to allow overrides, select the **Override** check box and enter the appropriate date.

If the seniority date is set up for manual entry, enter the appropriate date.

Click the **Recalculate Seniority Dates** button to recalculate seniority dates as needed.

See “Defining Seniority Dates” (PeopleSoft Human Resources Manage Labor Administration).

(DEU) Germany

Describing a German worker's labor category and role in a company is the third step in the German Works Council business process. Before you complete these fields, you must enter codes and values into the setup tables and create an association between the works council decision groups and the personnel action.

Field or Control	*Description*
Tariff	Displays the tariff, which is a labor contract between the union and the employers' association. The default comes from the worker's location listed in the Location table. You can override this default.
Tariff Area	Displays the tariff area, which is usually associated with geographical regions in Germany. The tariff area comes from the worker's location that is listed in the Location table. You can override this default.
Performance Group	Select a performance group, such as blue collar or white collar.
Labor Type	Specify if a worker is management or nonmanagement. Depending on where this worker belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.
Spokesmen Committee ID	If you identify a worker as management in the **Labor Type** field, then the Spokesmen Committee is responsible for the worker, and this field appears. The Spokesmen Committee ID for this worker comes from the worker's location in the Location table.

(ESP) Spain

Field or Control	*Description*
Union Date	Enter the date on which the worker joins the union.
Works Council Function	If the worker is a member of the works council for the organization, select which role. Values are: *Member, President,* and *Secretary.*
Intercenter Works Council Function	Select the role that the worker has in the union group (comite intercentros). Values are: *Member 1, Member 2,* and *Member 3.*

Field or Control	*Description*
Pay Union Fee and**Union Fee Amount**	Select if the worker pays a fee to the union and enter the amount of the fee.
Fee Start Date and **Fee End Date** (fee end date)	Enter the first and last dates on which the union fee should be paid.
Exempted	Select if this worker is exempt from a certain amount of work duty to handle works council duties.
Hours/Month	Enter the number of hours each month that the worker is exempted from regular work to handle works council business.

(FRA) France

Field or Control	*Description*
Rate	Enter the minimum salary calculation rate for this category. The rate is a three-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories, as defined on the Labor Agreement Categories page for the category. A subcategory can be associated with several possible rates, but only one rate is associated with the worker.

(ITA) Italy

Use this region to enter the union membership details of workers who belong to a union.

Field or Control	*Description*
Union Date	Enter the date on which the worker joins the union.
Union Position	Select the position that the worker holds in the union, if applicable.
Participation	Indicate the worker's level of participation in the union.

(IND) India

Field or Control	***Description***
Membership Status	Select whether the worker's union membership status is active or inactive.
Member Category	Enter the member category. For example, *Staff,* *Officer,* or *Workman Category.*
Position Held	Enter the position that the worker holds. Some of the members of the union may hold office in the union as president, vice president, treasurer, or secretary; you enter this information here.

(CAN and USA) Reviewing Union Membership in Canada and the U.S.

If you're managing a workforce in Canada or the U.S., you might want to review information about each union organization that the workers belong to and see a list of workers who are members. Use the Union Membership report (PER009) for this purpose. That report displays the worker ID, name, date hired, seniority date, department, location, job title, and shift.

Related Links

“Understanding Positions” (PeopleSoft Human Resources Manage Positions)

Payroll Page

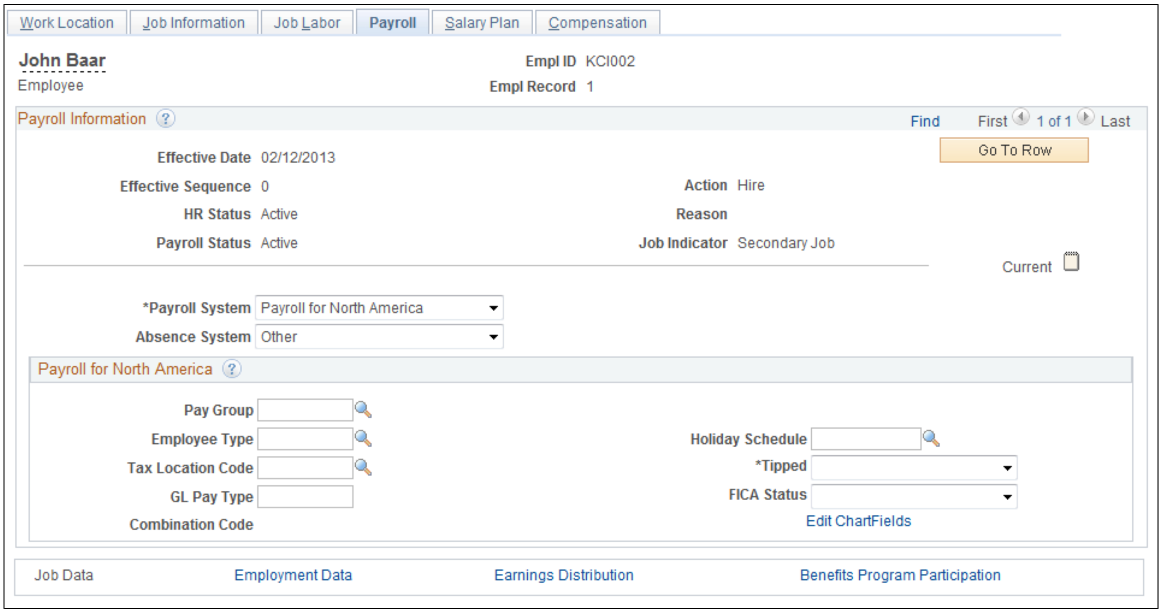
Use the Payroll page (JOB_DATA2) to enter payroll processing data.

The payroll system and pay group information that you enter here affects component compensation processing on the Job Data - Compensation page.

Navigation:

- **Workforce Administration** > **Job Information** > **Add Employment Instance** > **Payroll**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Employment Instance** > **Payroll**
- **Workforce Administration** > **Job Information** > **Add Contingent Worker Instance** > **Payroll**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Contingent Worker Instance** > **Payroll**

This example illustrates the fields and controls on the Payroll page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Payroll System	Select the payroll system that is used to process this person's paycheck. The **Payroll System** field is available for entry only if the **Action** that was entered on the Work Location page is *Change of Pay System* or a hire-related action such as *Hire, Rehire,* or *Additional Job.* **Note:** PeopleSoft Payroll for North America does not process payroll for contingent workers. Customers using the E&G contract pay functionality need to add contract workers using the Add Employment Instance component or the Organizational Relationships page.
Absence System	Select the absence system that is used to process this person's absences.

Payroll for North America

If you use PeopleSoft Payroll for North America or PeopleSoft Payroll Interface to process this person's paycheck, complete these fields:

Field or Control	***Description***
Pay Group	Select a pay group. Available values are the valid pay groups for the country selected on the Company table (not the regulatory region selected in the worker's job data).

Field or Control	*Description*
Employee Type	Displays the employee type; the value depends on the pay group. The system completes the field with the default value from the Pay Group table. If an employee type doesn't exist for this pay group, establish one in the Pay Group table.
Holiday Schedule	If you defined a default holiday schedule for the employee's location, the system displays it here. If you left the holiday schedule blank on the Location Profile page and entered a default on the Pay Group table, the system displays it here.
Tax Location Code	Select a tax location code. Available values are the valid tax locations for the country selected on the Company table (not the regulatory region selected in the worker's job data). ***Warning!*** Do not change a person's tax location code more than once for the same effective date (using effective sequence). The system creates tax records according to the first tax location change only. Tax records for the second tax location change on the same date are not created; instead, the system issues an error message.
Tipped	Indicate whether this worker receives tips. This field is available only if you define tips processing in the Company table. Values are: *Directly:* Select for workers who normally receive tips directly from customers (for example, food servers). *Indirectly:* Select for workers who do not normally receive tips directly from customers, but who might receive tips occasionally (for example, cooks and kitchen helpers). *Not Tipped:* Select for workers who are not tipped.
GL Pay Type (general ledger pay type)	Organizations can use this field for customized general ledger interfaces. Payroll for North America does not use this field.

Field or Control	*Description*
FICA Status	Select from: *EE FICA Exmpt* (exempt from employee FICA) Selecting EE FICA Exmpt tracks negative dollar amounts for employee OASDI taxes on wages and tips in tax classes 8A and 9A. The negative EE FICA tax amount is displayed on the wage statement, but the employee portion of the OASDI tax is not withheld from the employee's check. *EE/ER FICA Exmpt* (exempt from employee and employer FICA) Selecting EE/ER FICA Exmpt tracks negative dollar amounts for employee OASDI taxes on wages and tips in tax classes 8A and 9A and tracks negative dollar amounts for employer OASDI taxes on wages and tips in tax classes 8 and 9. The negative EE FICA tax amount is displayed on the wage statement, but the employee portion of the OASDI tax is not withheld from the employee's check. *ER FICA Exmpt* (exempt from employer FICA) Selecting *ER FICA Exmpt* tracks negative dollar amounts for employer OASDI taxes on wages and tips in tax classes 8 and 9. *Exempt* (exempt from OASDI and Medicare) *Medicare only* *Subject* (subject to OASDI and Medicare)
Combination Code	(Optional) Select the appropriate labor distribution to which to post the hours and earnings for this person. Enter the general ledger combination code in the employee's job data only on an exception basis. If you do not want the employee's earnings charged to the default combination code that is mapped to the earnings code and department, you can enter a different combination code here. For example, you might want to temporarily charge the employee's earnings to a different department. Use Correct History mode to enter or remove the temporary combination code.
Combination Code	Displays the combination code that defines a combination of ChartFields.

Field or Control	*Description*
Edit ChartFields	Click this link to access the ChartField Details page for selecting ChartField values.

Global Payroll

If you use PeopleSoft Global Payroll to process this person's paycheck, complete these fields:

Field or Control	*Description*
Pay Group	Select a pay group. The payroll system that you select on the Installation Table - Products page determines what value appears here. If *Global Payroll* is selected, the Global Payroll pay groups appear. **Note:** The Global Payroll **Pay Group** field is different from **the Payroll for North America Pay Group** field. Pay group is very important in Global Payroll. Selecting *Global Payroll* as your payroll system on the Installation Table - Products page and selecting a pay group is what helps select a payee into the payroll process.
Use Pay Group Eligibility, Use Pay Group Rate Type, and **Use Pay Group As Of Date**	When you select a pay group, these check boxes are automatically selected. Leave the check boxes selected to use the default values from the pay group definition. Deselect the check boxes to override the default values. **Note:** PeopleSoft Global Payroll stores the values at the Job level *only* if you override them here. If you add a new effective-dated row to the job record or change the pay group assignment, the system reverts to the pay group defaults.
Holiday Schedule	Enter a holiday schedule. If you leave this field blank, Global Payroll processing uses the holiday schedule assigned to the payee's pay group, but does not enter that holiday schedule here.
Eligibility Group	This field is blank if the **Use Pay Group Eligibility** check box is selected. If you want to override the pay group default, deselect the check box and select an eligibility group which specifies earnings, deduction, and absence elements that a payee might be eligible to receive.

Field or Control	***Description***
Exchange Rate Type	This field is blank if the **Use Pay Group Rate Type** check box is selected. If you want to override the pay group default, deselect the check box and select the currency exchange rate type to use when performing currency conversions for the payee.
Use Rate As Of	This field is blank if the **Pay Group As Of Date** check box is selected. If you want to override the pay group default, deselect the check box and select the pay calendar date to use when retrieving the effective-dated exchange rate information during currency conversions. The **Use Rate As Of** field works with the **Exchange Rate Type** field to determine which effective date is retrieved to get the appropriate exchange rate for the calendar period being processed. Exchange rate effective dates include: *Period Begin Date, Period End Date,* and *Payment Date.*

(AUS) Australia

Field or Control	***Description***
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(HKG) Hong Kong

Field or Control	*Description*
Balance Group Nbr (balance group number)	Enter a balance group number. When workers are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separately. PeopleSoft Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of a worker in a tax year are stored separately in terms of payroll data. This enables a worker to have multiple tax balances if the worker is terminated and rehired in the same financial year. When a worker is rehired in the same tax year, the balance amount is stored in the system variable CM VR BAL GRP ID, which is attached to each year-to-date (YTD) accumulator. Every time you run the payroll process, the balance that is stored in the system variable CM VR BAL GRP ID is retrieved by the accumulator to resolve the earnings that are generated for each new position. Balance group numbers are used to maintain earnings balances and are used as User Key 2 for all Hong Kong YTD accumulators.

(NZL) New Zealand

Field or Control	*Description*
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(SGP) Singapore

Field or Control	***Description***
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

Note: Before entering information for U.S. foreign nationals, use the Substantial Presence Test. Select **Workforce Administration** > **Personal Information** > **Citizenship** > **Employee Presence Test USA** > **Employee Presence Test USA.**

Related Links

(USA) Determining U.S. Residency Status for Foreign Nationals
“Administer Compensation Overview” (PeopleSoft Human Resources Administer Compensation)
“Setting Up Holiday Schedules” (Application Fundamentals)
PeopleSoft Payroll for North America

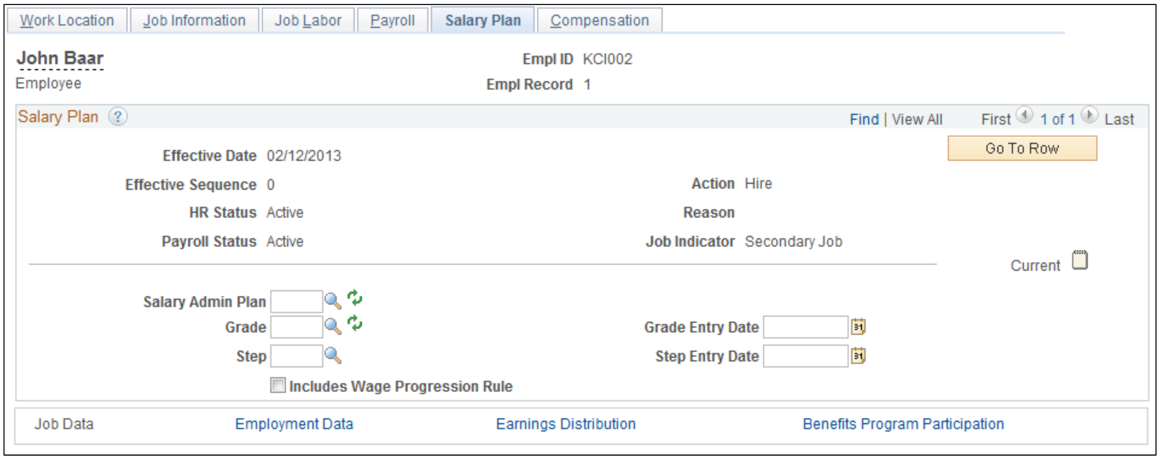
Job Data - Salary Plan Page

Use the Salary Plan page (JOB_DATA_SALPLAN) to enter information about a person's salary plan.

Navigation:

- **Workforce Administration** > **Job Information** > **Add Employment Instance** > **Salary Plan**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Employment Instance** > **Salary Plan**
- **Workforce Administration** > **Job Information** > **Add Contingent Worker Instance** > **Salary Plan**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Contingent Worker Instance** > **Salary Plan**

This example illustrates the fields and controls on the Salary Plan page. You can find definitions for the fields and controls later on this page.



Military

The section appears when military functionality is enabled on the Installation Table. Select a military service for a person on the Work Location page prior to entering a rank or worn rank.

Field or Control	*Description*
Rank	Enter the service member's earned rank. Valid ranks are defined on the Military Service - Service Ranks page.
Rank Entry Date	Enter the date the member received this rank.
Worn Rank	Enter the service member's rank insignia while serving in a particular post. The default value for this field comes from the **Rank** field but it can be overwritten. Changes to the **Rank** field value will also change the value in this field. **Note:** To have the system display the worn rank in front of the employee's name at the top of the Personal Data, Job Data, and military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the Domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the Names in Personal Data Component. See "PeopleSoft Events and Notifications Framework Overview" (Events and Notifications Framework)

Field or Control	*Description*
Worn Rank Type	Indicate why the individual is on worn rank.
Skill Grade	Select the overall grade level for which the individual has been evaluated

Note: When military rank information is defined for a service member, the system restricts the salary plan to those plans associated with military ranks on the Military Service table. In addition to this, only the salary grades associated with the specified ranks are available. Therefore, the salary defaulting logic does not apply to military users.

Salary Plan

Field or Control	*Description*
Salary Administration Plan	Displays the salary administration plan code. This field will default from the position number you associated with a person, and is available for entry regardless if you click the Override Position Data button. If you are not using position management and you associate salary administration plans with locations or job codes, the value that is in this field comes from either the Location or Job Code table, based on setID matching. You can override the default. **Note:** If you have salary administration plans associated with more that one of these tables, the system uses the default from the last table value entered. For example, first you enter a location that is associated with salary plan KU02 where this salary plan defaults to this page. Then, you enter a job code that is associated with salary plan KU03, and the system will update the salary plan to KU03. If you change the location after hire (and a salary plan is defined in the Location table), then the system does not automatically display a default value for this salary plan. Instead, the system checks if the existing grade and step are still valid for this new salary plan. The existing grade and step must also be defined for the new salary plan. If the grade and step are defined for this new salary plan, then the system displays by default from the Location table the value for the new salary plan. If the grade and step are not defined for this new salary plan, then the system does not change to the salary plan from the Location table. To use auto-calculated premium processing for this person, select a plan that has Auto Calculated Premium selected and an absorbing or nonabsorbing (or both) premium rate code assigned in the Salary Plan table. The system displays auto-calculated-premium-related fields on the Compensation page only if you select an auto-calculated premium plan here. **Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.

Field or Control	*Description*
Grade	If you associate a grade with the person's position or job code, the system displays the default value from the appropriate table. **Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.
Grade Entry Date	Displays the date on which the person first joined this grade. You can override this value. If you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date.
Step	If you associate a step with the person's position or job code, the system displays the default value from the appropriate table.
Step Entry Date	Displays the date on which the person first joined this step, or if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date. You can override this value. **Note:** The system verifies the combinations of salary administration plans and grades that you select.
Includes Wage Progression Rule	The system selects this check box if the salary plan includes wage progression.

Related Links

"Understanding PeopleSoft HCM System Data Regulation" (Application Fundamentals)

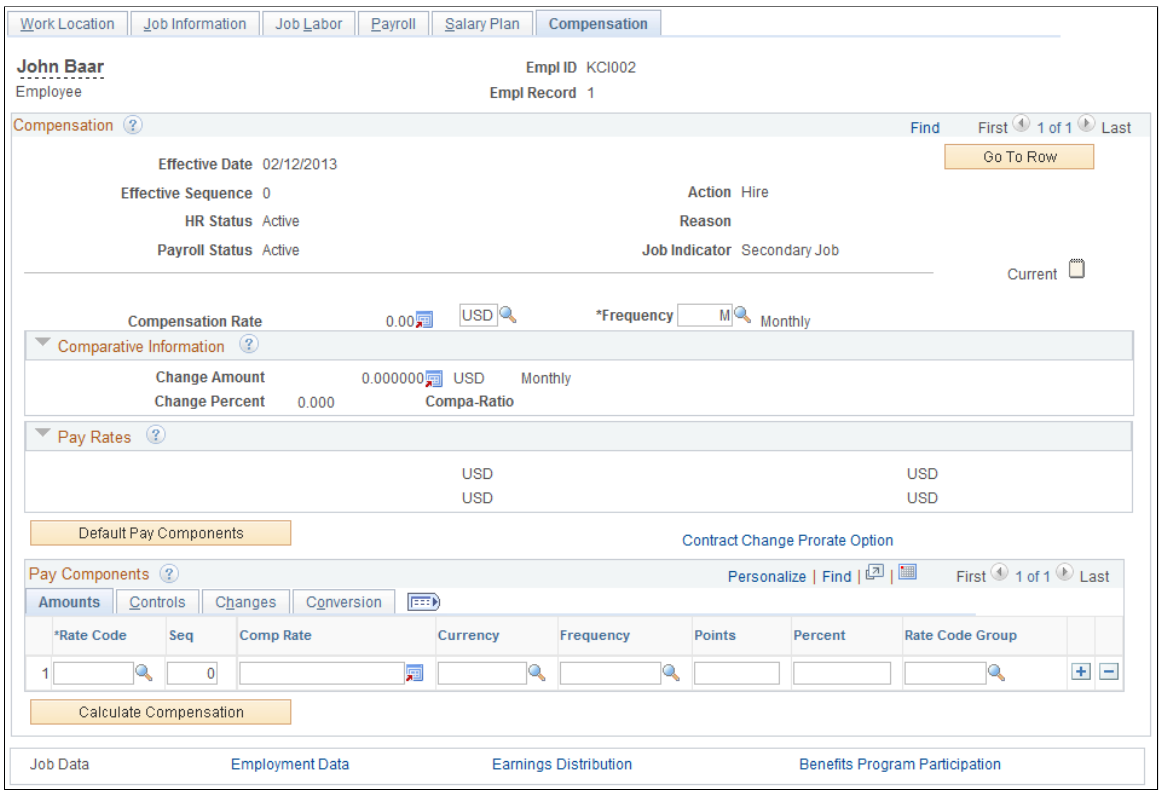
Compensation Page

Use the Compensation page (JOB_DATA3) to enter compensation information.

Navigation:

- **Workforce Administration** > **Job Information** > **Add Employment Instance** > **Compensation**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Employment Instance** > **Compensation**
- **Workforce Administration** > **Job Information** > **Add Contingent Worker Instance** > **Compensation**
- **Workforce Administration** > **Personal Information** > **Organizational Relationships** > **New Contingent Worker Instance** > **Compensation**

This example illustrates the fields and controls on the Compensation page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Compensation Rate	Displays the compensation rate for the person, which is the sum of all base pay salary components.

Field or Control	Description
Frequency	Select a compensation frequency. Select *Contract* for contract persons. The system uses the information that you set up on the Contract Pay page to manage the person's compensation. **Note:** The Retro Pay functionality in PeopleSoft Payroll for North America and PeopleSoft Global Payroll is triggered by any frequency or compensation rate change with an effective date that is earlier than or equal to the latest pay end date of a check that is already paid to the person. Also for Retro Pay, the Frequency here cannot be hourly. It must be weekly, bi-weekly, semi-monthly or monthly, or a frequency that reflects a pay period amount.

Auto Calculated Premium

Field or Control	*Description*
Target Comprate (target compensation rate)	Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Auto calculating premium may be: *Absorbing.* Premium decreases when the compensation rate increases over time in order to maintain the target compensation rate. *Non-Absorbing.* Premium does not change even when the compensation rate increases over time. The system calculates the difference between this amount and the original job compensation rate and enters the difference in the premium components (the absorbing or nonabsorbing or both premium rate codes of the salary plan) of the person's compensation package. The system then recalculates the compensation rate with the premium component compensation rate. If both an absorbing rate code and a nonabsorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target compensation rate and the originally calculated job compensation rate. You can then enter some portion of the total calculated premium in the nonabsorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target compensation rate remains the same) or delete the nonabsorbing rate code. The system recalculates the job compensation rate, including the premium component compensation rate. You cannot enter a target compensation rate that is less than the original job compensation rate without the premium components. This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.
Don't Absorb Changes	Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount. This option only applies to persons who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

Comparative Information

Field or Control	***Description***
Change Amount	Displays the change in the amount of compensation for the rate code.
Change Percent	Displays the percent of change in the compensation for the rate code.
Compa-Ratio (comparison ratio)	Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.
Job Ratio	Displays the percent-through-range calculation, based on the midpoint salary of the person's job code. The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This group box contains pay rates that are calculated by using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See “Default Frequencies by Country Page” (Application Fundamentals).

Field or Control	*Description*
Default Pay Components	Click to: • Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields. • Replace manual updates and old default values with the current default values. • Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on. • Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record. If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click **OK,** the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).
(E&G) Contract Change Prorate Option	Click to access the Contract Pay Prorate Options page, where you choose how to handle contract pay when there is a change to the contract amount. Use this link only when the payment frequency is *C* (contract). The link is active only when the row is available for data entry. The system displays the selected proration option to the left of the link so that you can review the settings even when the link is inactive. See "Contract Change Prorate Options Page" (PeopleSoft Payroll for North America).
Calculate Compensation	Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components: Amounts Tab

Select the Amounts tab.

Field or Control	*Description*
Rate Code	Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information that is associated with this rate code in the pay components grid. **Note:** If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.
Comp Rate (compensation rate)	Displays the compensation rate for the pay component.
Frequency	Displays the compensation frequency for the pay component. **Note:** The Rate Code and Frequency for salaried employees must either be the pay period or Annual. It should not be Hourly. Using an hourly rate code and frequency for salaried employees can adversely impact Retro Pay and FLSA calculations.
Points	Displays the salary points that are associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the **Salary Points** check box on the Installation Table page.
Percent	If the rate type for this rate code is percent, the system displays the percent that is to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).
Rate Code Group	Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of a person compensation package.

Pay Components: Controls Tab

Select the Controls tab.

Field or Control	***Description***
Source	Indicates how the pay component gets into the pay components grid. *Manual* indicates that the pay component is added manually. *Salary Step* indicates that the pay component is retrieved by default from the salary step. *Job Code* indicates that the pay component is retrieved by default from the job code, and so on.
Manually Updated	This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.
Default Without Override	Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

Pay Components: Changes Tab

Select the Changes tab.

Field or Control	***Description***
Change Amount	Displays the overall change amount in this pay component rate.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components: Conversion Tab

Select the Conversion tab.

Field or Control	***Description***
Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

Field or Control	*Description*
Apply FTE (apply full-time equivalent)	Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

Related Links

“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)
“Understanding Contract Earnings” (PeopleSoft Payroll for North America)
PeopleSoft Human Resources Administer Compensation
“Job Data Pay Rate Frequencies” (Application Fundamentals)

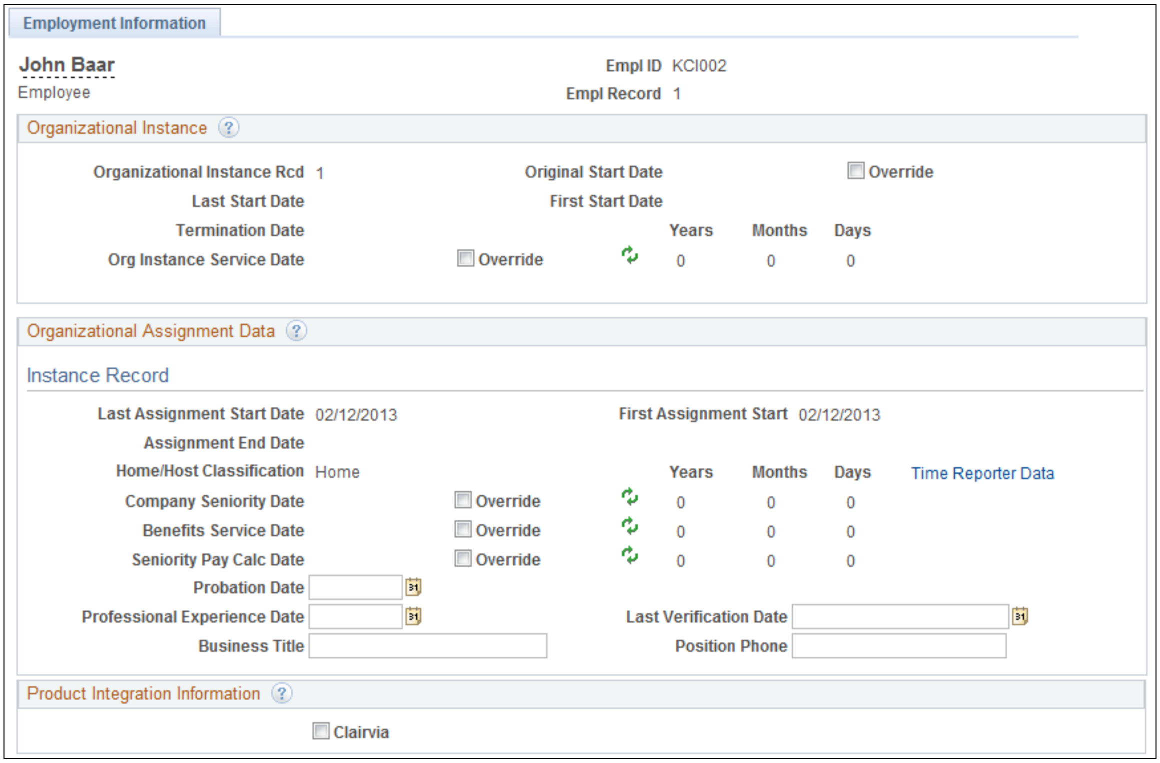
Employment Information Page

Use the Employment Information page (EMPLOYMENT_DTA1) to enter optional data, such as a worker's business title.

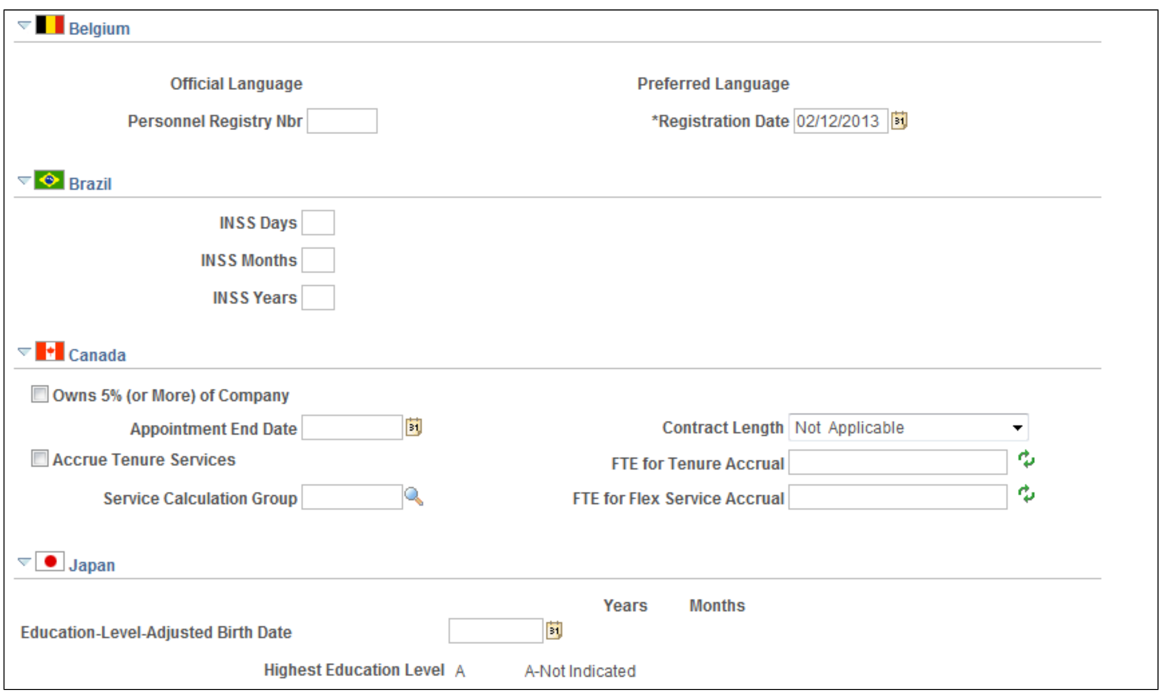
Navigation:

- Click the **Employment Data** link at the bottom of the Add Employment Instance component.
- Click the **Employment Data** link at the bottom of the New Employment Instance component.
- Click the **Employment Data** link at the bottom of the Add Contingent Worker Instance component.

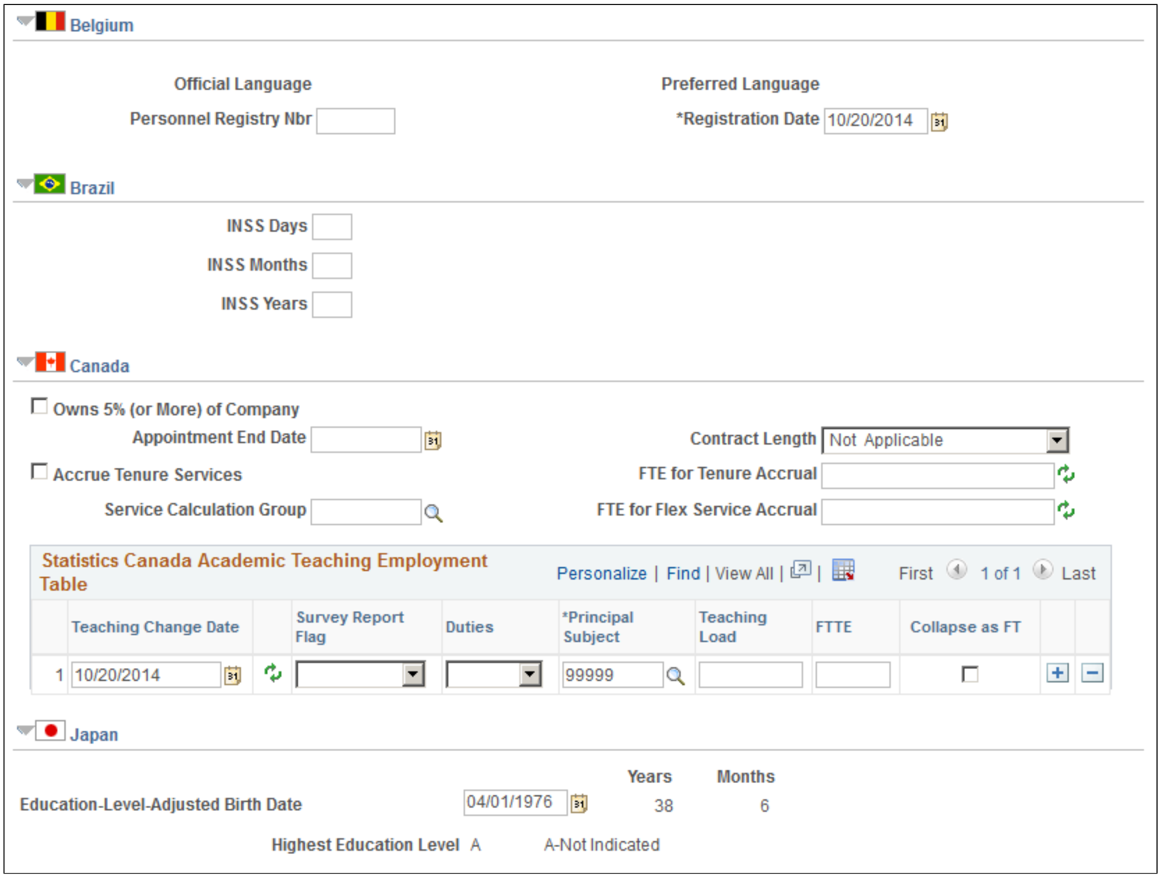
This example illustrates the fields and controls on the Employment Information page (1 of 4). You can find definitions for the fields and controls later on this page.



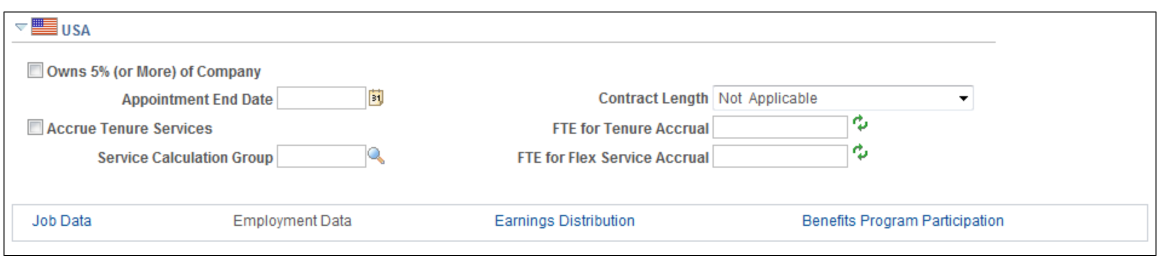
This example illustrates the fields and controls on the Employment Information page (2 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Employment Information page (3 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Employment Information page (4 of 4). You can find definitions for the fields and controls later on this page.



Note: The dates on this page are used in reports and to enable you to track a person's work history.

Organizational Instance

Field or Control	***Description***
Organizational Instance Rcd (organizational instance record)	The number of the instance associated with this job data record. The organizational instance record number is the same as the ERN of the controlling instance. You can only modify the organizational instance dates when you review this page for the controlling instance. **Note:** When you review this page for a non-controlling instance, the system makes the rest of the fields in this group box display only because non-controlling instances inherit the instance dates from the controlling instance.
Original Start Date	Displays the earliest date that this job data record (emplID/ ERN instance) was associated with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* This is not the date the job was created in the system, like the **Date Created** field on the Work Location page. You can override this date to enter an earlier start date, for example if the person has previously worked for the company or an affiliate or, depending upon company policies, for special cases like jobs with probationary periods, mergers and acquisitions, and so on. See Understanding Job Data.
Last Start Date	Displays the most recent start date for this organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of *HIR* and then refreshes it with the effective date of job data rows with the actions *REH* (for employees) or *RNW* (for contingent workers). This date is different from the first start date if this organization instance has been inactive and then reactivated.

Field or Control	***Description***
First Start Date	Displays the first start date for this organization instance. The system populates this field with the effective date of the first job data row with the action of *HIR* (for employees) or *ADD* (for contingent workers) from the controlling instance. The system uses this date as the hire date in reports. **Note:** The system does not refresh this date again unless you enter a new row in the controlling instance with one of these actions. You would normally not do this unless you needed to reset the hire date.
Termination Date	Displays the effective date of the controlling instance's job data row with the action of *TER* or *COM,* if applicable. If you rehire or renew a person's controlling instance, the system deselects this field.
Org Instance Service Date (organizational instance service date) and **Override**	Displays the effective date on which the service of a person commenced with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* Select the **Override** check box to override this date to enter an earlier service date, for example if the person has previously worked for the company or an affiliate. See Understanding Job Data.
Provider ID	For contingent workers, displays the ID of the service provider.

Organizational Assignment Data

Assignments are the job data records tracked under an organizational instance, each identified by a unique emplID/ERN combination. Track the start and completion dates of individual assignments at the assignment level.

Field or Control	***Description***
Last Assignment Start Date	Displays the most recent start date for this assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.

Field or Control	*Description*
First Assignment Start	Displays the first start date for this assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment (such as *HIR* or *ADD).*
Assignment End Date	Displays the effective date of the job data row with the action of *TER* or *COM,* if applicable.
Home/Host Classification	For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location. For a new hire, select *Home.*
Time Reporter Data	Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Time and Labor, this link is unavailable.
Company Seniority Date or **Engagement Date**	This field normally displays as the **Company Seniority Date** field. However, when military functionality is enabled on the Installation Table and this person is a person associated with a rank, this field displays as the **Engagement Date** field. Based on the date that you enter here, the system calculates the number of years, months, and days of seniority or engagement for a person.
Benefits Service Date	Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility.
Seniority Pay Calc Date (seniority pay calculation date)	Enter the date that the system should use to calculate seniority-based pay.
Probation Date	Enter the date on which the worker is placed on probation.
Professional Experience Date	Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.
Last Verification Date	Displays the latest date on which the worker verified his or her personal data in the system.

Field or Control	*Description*
Business Title	Enter the worker's official title, which might be different from the job title. If the employee is in a position, the system displays the current title from the worker's position. When this field gets its value from the position, and position data is not overridden, you should run the Refresh Person Org Assignments (HR _PERORGASN) process to update the Employment Data record with future dated rows that have become current. For more information on this process, see the "Refresh Person Org Assignments Page" (PeopleSoft Human Resources Manage Positions).
Position Phone	Track the worker's primary work phone number. You can also update this field by using the Add/Update Position Info pages. If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page. When this field gets its value from the position, and position data is not overridden, you should run the Refresh Person Org Assignments (HR_PERORGASN) process to update the Employment Data record with future dated rows that have become current. For more information on this process, see the "Refresh Person Org Assignments Page" (PeopleSoft Human Resources Manage Positions).

Note: When you enter a new row with an action of *HIR, ADD, POI, ADL,* or *ASG* and save the component, the system sets the **Company Seniority Date, Benefits Service Date,** and **Seniority Pay Calc Date** (seniority pay calculation date) fields on this page to the effective date that you enter on the Work Location page as long as the **Override** date check box is not selected. You can override these fields after saving the component. The system calculates and displays the worker's service months and days based on the information that you enter in the **Company Seniority Date, Service Date,** and **Seniority Pay Calc Date** fields.

Military

The system displays the military section when military functionality is enabled on the Installation Table.

Field or Control	*Description*
Early Promotion Date	Enter the earliest date this service member may be considered for the next promotion.

(BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

Field or Control	*Description*
Personnel Registry Nbr (personnel registry number)	Enter the number under which the worker is registered in the personnel register.

(BRA) Brazil

Field or Control	*Description*
INSS Days, INSS Months, and **INSS Years** (Instituto Nacional de Securidade Social days, months, and years)	Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company.

(CAN) Canada

Field or Control	*Description*
Accrue Tenure Services	Select to activate the tenure accrual.
FTE for Tenure Accrual	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker's accrued service.

(CAN) (E&G) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys business process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. Review the information in this table to ensure that it is up-to-date every time that you change a worker's record.

Field or Control	*Description*
Teaching Change Date	The system adds a new teaching change date row only if you choose to add one. Insert a new row for each teaching appointment if the institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported.
Survey Report Flag	Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A,* this record isn't reported in academic teaching surveys. You can override this default value.
Duties	Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default.
Principal Subject	Select the principal subject that is taught by the worker.
Teaching Load	Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0.* If the worker is teaching one full course and one-third of another, enter *1.33.*
FTTE (full-time teaching equivalency)	Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter *.75.*
Collapse as FT (collapse as full-time)	Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job. Use this field only if the worker: • Has two or more part-time jobs in different departments that function as a single full-time job. • Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary. Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

(JPN) Japan

Field or Control	*Description*
Educ Lvl-Adjsted Birth Date (education-level-adjusted birth date)	Select the worker's education-level-adjusted birth date. The day and the month are the organization's standard calculation birth date (SCB—usually April 1); the year comes from the worker's education-level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give a worker credit for special work experience).
Years Months	Displays the worker's highest education level as specified in the Personal Data component. This education level is the starting point for education-level age-related calculations.

(MYS and SGP) Malaysia and Singapore

After you set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible workers that are in the workforce are granted festive advances. Assigning the festive advance type to the worker occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the worker's festive advance details should be different, change them on this page.

Field or Control	*Description*
Ethnic Group and**Religion**	Displays the values that you enter on the Personal Data - Regional page.
Festive Advance Pay Program	Displays the value from the Job Code Table - Job Code Profile page. You can change this default.
FA Holiday Type (festive advance holiday type)	Select a festive advance type. Values are: *Chinese New Year, Christmas, Deepavali, Hari Raya,* and *N/A*. The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select *N/A*.

Field or Control	*Description*
Festive Advance Eligible From	Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored. When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page. When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance. **Note:** This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the worker has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

(NLD) Netherlands

Field or Control	*Description*
Relation to Owner	Select the worker's relationship to the owner, as appropriate.

(USA) United States of America

Field or Control	*Description*
Accrue Tenure Services	Select to activate the tenure accrual.
FTE for Tenure Accrual	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.

Field or Control	Description
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker's accrued service.

Related Links

“Assignment Data Page” (PeopleSoft Human Resources Track Global Assignments)
“Education Level Page” (Application Fundamentals)
“Understanding the Festive Advance Process” (PeopleSoft Human Resources Administer Festive Advance)
“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)
“Understanding Positions” (PeopleSoft Human Resources Manage Positions)
“Understanding Time and Labor Implementation” (PeopleSoft Time and Labor)

Job Earnings Distribution Page

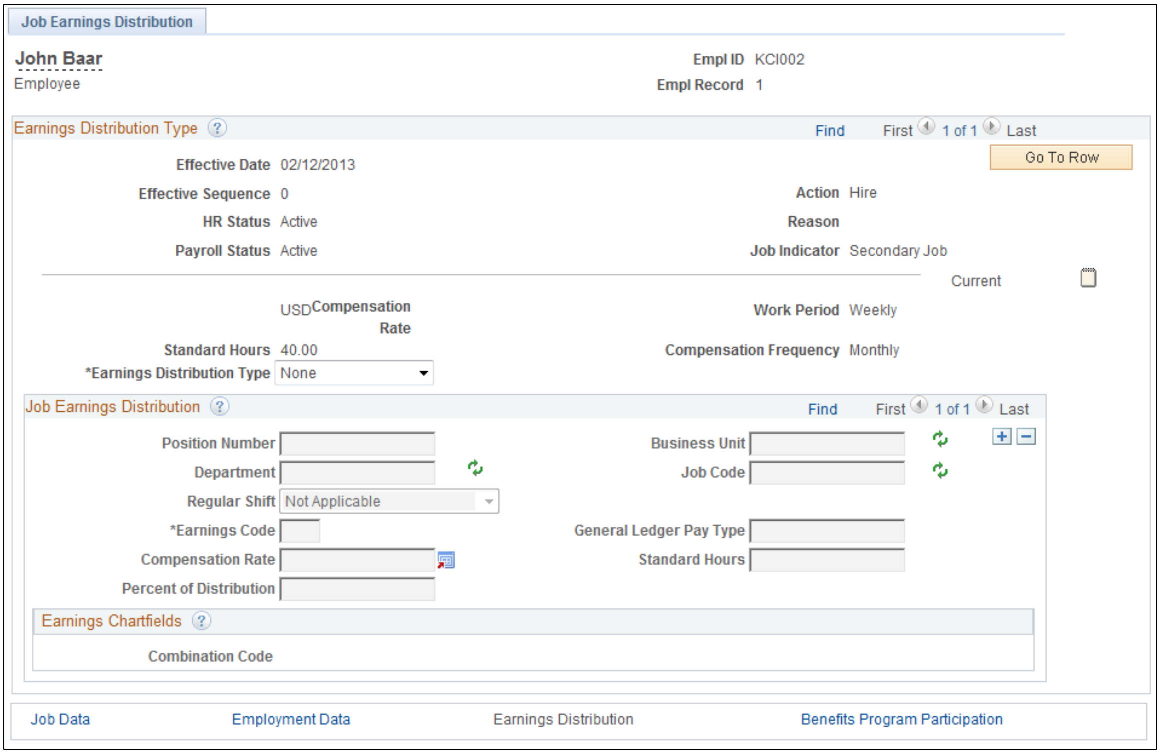
Use the Job Earnings Distribution page (JOB_DATA_ERNDIST) to distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types.

If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Navigation:

- Click the **Earnings Distribution** link at the bottom of the Add Employment Instance component.
- Click the **Earnings Distribution** link at the bottom of the New Employment Instance component.
- Click the **Earnings Distribution** link at the bottom of the Add Contingent Worker Instance component.
- Click the **Earnings Distribution** link at the bottom of the New Contingent Worker Instance component.

This example illustrates the fields and controls on the Job Earnings Distribution page. You can find definitions for the fields and controls later on this page.



Review these guidelines prior to entering data on the Job Earnings Distribution page:

- Skip this page if you don't need to distribute standard earnings for the person.

  Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.

- The system hides this page when all job rows in the component use PeopleSoft Global Payroll.

  However, if any job row has another payroll system (for example, PeopleSoft Payroll for North America or Payroll Interface), then the system displays the page.

- Don't use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Payroll for North America for handling special earnings.

- If you enter a parameter such as department on this page, the parameter overrides the same field on the job record.

  If you leave a parameter blank, the system uses the field from the job record.

Field or Control	***Description***
Standard Hours and **Work Period**	If you are using position management and click the Override Position Data button, these fields become available. If you change these values on this page, it will also update the same fields on the Job Information page.

Field or Control	***Description***
Earnings Distribution Type	Select an earnings distribution type. Values are: • *None:* Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, leave the other fields on this page blank. **Note:** You must select *None* if you want the system to use the proration rule that you select on the Pay Group Table - Paysheets page when prorating partial pay. See "Understanding Pay Groups" (Application Fundamentals). • *By Amount:* Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount. Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the **Compensation Rate** field on the Job Data - Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record. For example, to charge 3,000 of a worker's regular earnings to the worker's regular department (on the job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines: • On the first line, leave **Department** blank (so that the system uses the worker's regular department from the job record) and enter *3000* in the **Amount** field. • On the second line, enter *105* in the **Department** field and *544* in the **Amount** field. • On the third line, enter *10503* in the **Department** field and *1000* in the **Amount** field. The amounts that are in the distribution lines total 4,544, so the system checks that amount in the **Compensation Rate** field on the worker's job record equals this total. • *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the **Standard Hours** field on the Job Data - Job Information page. The **Standard Hours** field that appears at the top of this page also changes. Enables you to apportion the worker's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the **Standard Hours** field on the worker's job record.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td></td><td>
For example, if a worker works a 40-hour week, and you want to charge 30 hours of regular pay to the worker's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines:

On the first line, leave Department blank (so that the system uses the worker's regular department (from the job record) and enter 30 in the Standard Hours field.
On the second line, enter 103 in the Department field and 10 in the Standard Hours field. The hours that are in the distribution lines total 40, so the system inserts 40 in the Standard Hours field on the worker's job record.

By Percent: Available to all workers. The sum of the percentages that are in the distribution lines must equal 100.

Enables you to apportion the worker's total earnings for a period on a percentage basis.

For example, to charge 80 percent of regular earnings to the worker's regular department (on the worker's job record) and 20 percent to department 100, set up two distribution lines:

On the first line, leave Department blank (so that the system uses the worker's department from the job record) and enter 80 in the Percent field.
On the second line, enter 100 in the Department field and 20 in the Percent field.

</td></tr>
</table>

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note: This feature works only for hourly workers, not for salaried workers.

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the **By Percent** option, enter the appropriate disability earnings code, and enter a percent of *100.*

Note: When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

Related Links

“Understanding Earnings Tables” (PeopleSoft Payroll for North America)

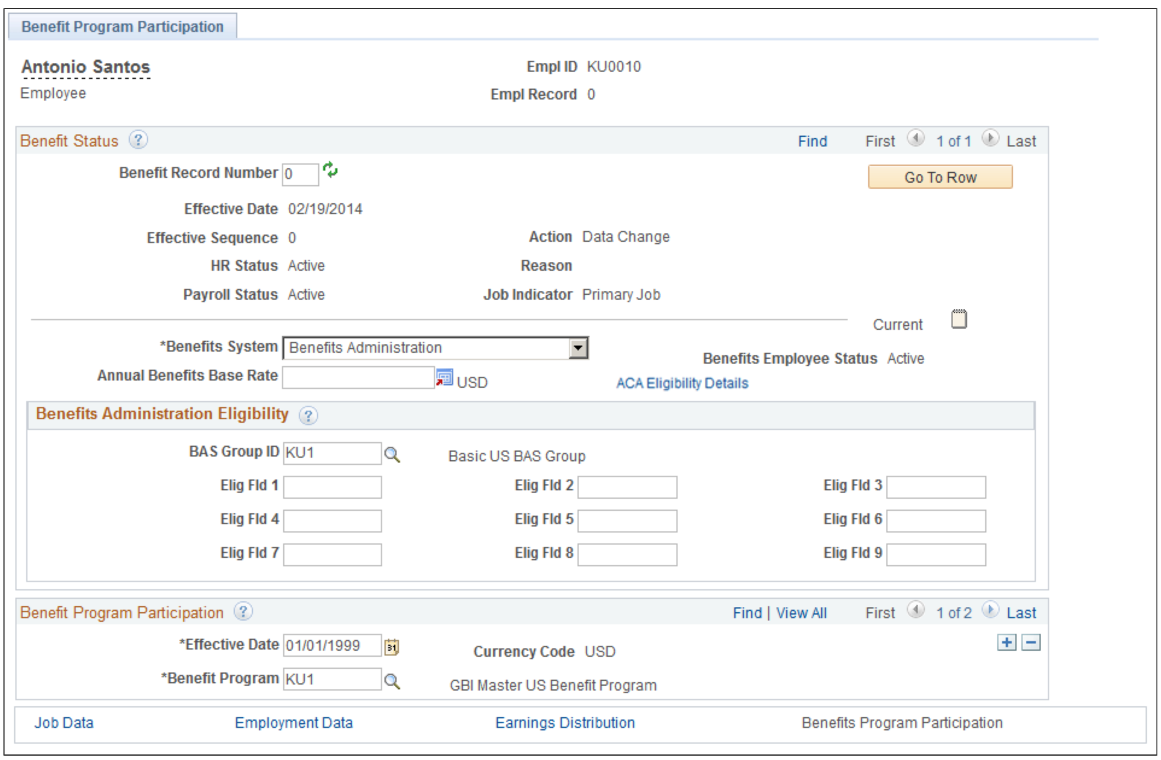
Benefit Program Participation Page

Use the Benefit Program Participation page (JOB_DATA_BENPRG) to specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.

Navigation:

- Click the **Benefits Program Participation** link at the bottom of the Add Employment Instance component.
- Click the **Benefits Program Participation** link at the bottom of the New Employment Instance component.
- Click the **Benefits Program Participation** link at the bottom of the Add Contingent Worker Instance component.
- Click the **Benefits Program Participation** link at the bottom of the New Contingent Worker Instance component.

This example illustrates the fields and controls on the Benefit Program Participation page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Benefit Record Number	Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to *0.* You can override this value to attach this job to a different benefit record number. The system deselects the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.
Benefits System	Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.
ACA Eligibility Details	This links is available when the country associated with the regulatory region for this person is *USA* and the company is associated with an ACA Common ID from the ACA Company Table. If it does not meet these requirements, the link will be hidden. Select this link to access the ACA Employee Eligibility page in Benefits, which enables you to provide details about the employee ACA eligibility. From Job Data, the ACA Employee Eligibility page appears in a modal window. After saving the ACA eligibility details, the system will return you to the Job Data pages. **Note:** You must save the data you have entered in Job Data before accessing the Benefits component to enter ACA eligibility information. If you select the **ACA Eligibility Details** link before saving the data, the system will prompt you to save prior to entering the eligibility information. If you click **Cancel,** the system will return you to the Benefit Program Participation page, where you can continue to enter information or save the job data. If you select **OK,** the system will save your job data and the *ACAEligibility* event will be raised if this is a new hire. **Important!** When adding job data for a new hire, it is possible that you may click the **ACA Eligibility Details** link before the event handler has processed the event to create the ACA Eligibility record for the employee. If this is the case, the system will display the Benefits ACA Eligibility modal window using the transfer record and you may update the eligibility manually. If the event handler processes the event in the background and creates the ACA Eligibility record for the employee, then you will get a data conflict error when you attempt to save the changes.

Benefits Administration Eligibility

Field or Control	*Description*
Elig Fld 1–9 (eligibility configuration fields 1−9)	Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation

Field or Control	*Description*
Currency Code	Displays the code of the currency that is specified for the benefit program in the Benefit Program table.
Benefit Program	Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value.

Related Links

"Understanding the Core Tables for PeopleSoft Manage Base Benefits" (PeopleSoft Human Resources Manage Base Benefits)

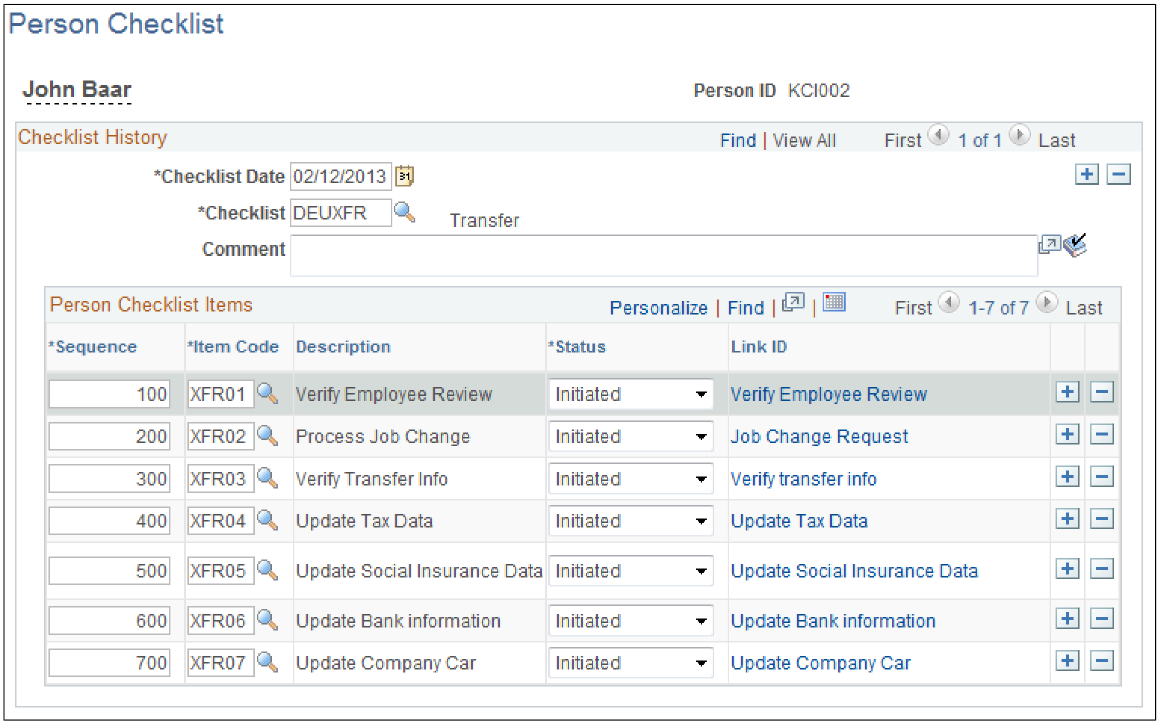
Person Checklist Page

Use the Person Checklist page (PERSON_CHECKLIST) to ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Navigation:

Workforce Administration > **Personal Information** > **Organizational Relationships** > **Person Checklist** > **Person Checklist**

This example illustrates the fields and controls on the Person Checklist page. You can find definitions for the fields and controls later on this page.



You can have more than one checklist active for a person at any one time.

Field or Control	***Description***
Checklist	Select the appropriate checklist. The system populates the list with the associated items.

Person Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Field or Control	***Description***
Item Code	Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.

Field or Control	***Description***
Status	The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary: • *Completed* • *Initiated* • *Notified* • *Received*
Link ID	Displays a link to the component used to complete the listed item. For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

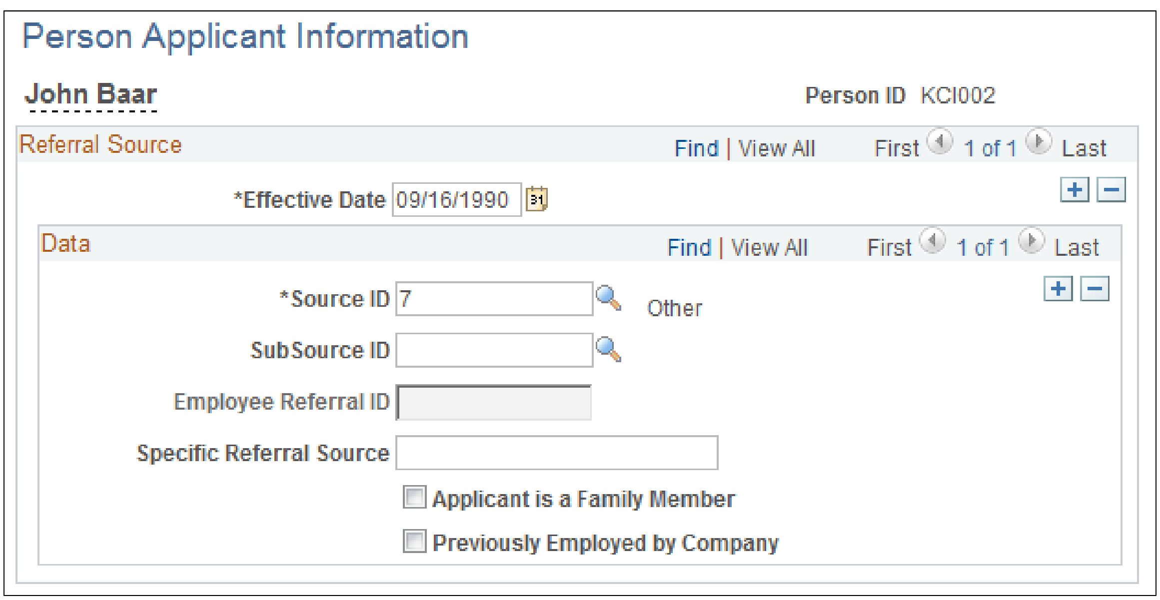
Person Applicant Information Page

Use the Person Applicant Information page (PERS_APPL_INFO) to define applicant referral information.

Navigation:

Workforce Administration > **Personal Information** > **Organizational Relationships** > **Person Applicant Information** > **Person Applicant Information**

This example illustrates the fields and controls on the Person Applicant Information page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Source ID	Select a referral source for this person. Referral sources are defined using the Source Setup page. See "Setting Up Recruitment Sources" (PeopleSoft Talent Acquisition Manager).
SubSource ID	Select a subsource for this person. Subsources are defined on the Marketing page. See "Setting Up Recruitment Sources" (PeopleSoft Talent Acquisition Manager).
Employee Referral ID	Select the employee who referred this person. This field is available if the **Source ID** field equals *Employee.*
Specific Referral Source	Enter any text that further defines the referral information.
Applicant is a Family Member	Select this check box if this person is a family member of the referral source.
Previous Employed by Company	Select this check box if this person was previously employed by the company.

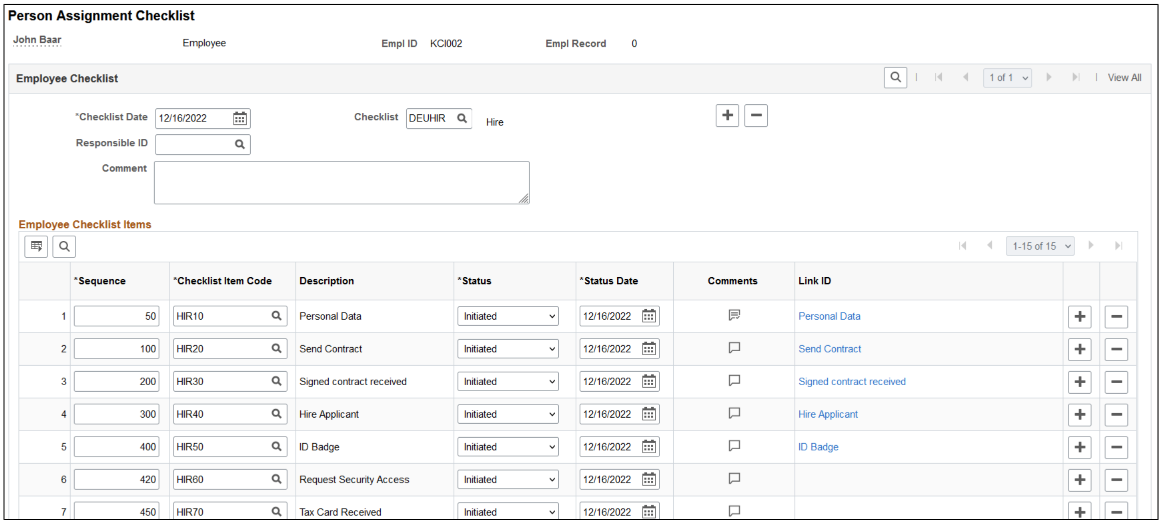
Person Assignment Checklist Page

Use the Person Assignment Checklist page (EMPLOYEE_CHECKLIST) to ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Navigation:

Workforce Administration > **Personal Information** > **Organizational Relationships** > **Person Assignment Checklist** > **Person Assignment Checklist**

This example illustrates the fields and controls on the Person Assignment Checklist page. You can find definitions for the fields and controls later on this page.



You can have more than one checklist active for an employee at any one time.

Field or Control	***Description***
Checklist	Select the appropriate checklist. The system populates the list with the associated items.
Responsible ID	Select the person who is responsible for making sure the tasks on the checklist are completed.

Employee Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Field or Control	***Description***
Checklist Item Code	Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.
Status	The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary: • *Completed* • *Initiated* • *Notified* • *Received*

Field or Control	*Description*
Comments (empty Comments) icon or (populated Comments) icon.	Select this icon to access the Checklist Item Comments page to enter or manage additional information about an item. The callout image icon will appear blank when no comments are available and with lines in the callout when comments are present.
Link ID	Displays a link to the component used to complete the listed item. For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

(Fluid) Adding Organizational Instances

Using the PeopleSoft Fluid User Interface, you can add a new job record to the system in several ways, depending on the organizational relationship you are adding [employee, contingent worker, or person of interest (POIs)].

To add a person and their organizational instance simultaneously, use the Create Employee, Crate Contingent Worker, and Create Person of Interest tiles on the Manage Human Resources Dashboard.

See the (Fluid) Adding a Person topic to view the Person Data pages that precede the Job Data pages in the activity guide process.

See also the Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid.

The following videos provide an overview and demonstration of how to use the fluid Person Data modification feature:

Video: Image Highlights, PeopleSoft HCM Update Image 47: Person Data Modernization

Video: Person Data Modernization

These topics discuss how to add organizational instances for a new person using the fluid pages.

Related Links

(Classic) Adding Organizational Instances
(Fluid) Updating Job Data

Pages Used to Add Organizational Instances in Fluid

Page Name	***Definition Name***	***Usage***
Create Employee Tile	HC_HR_PERS_EMP_ADD_FL_GBL (this is the cref for this tile)	Create a new Person Data and Job Data record with an employee relationship.
Create Employee Page	SRCH_PERSON_FL	Perform a search for duplicate IDs (with the ability to view or modify existing person records) and add a person with an employee organizational relationship.
Create Contingent Worker Tile	HC_HR_PERS_CWR_ADD_FL_GBL (this is the cref for this tile)	Create a new Person Data and Job Data record with a contingent worker relationship.
Create Contingent Worker Page	SRCH_PERSON_FL	Perform a search for duplicate IDs (with the ability to view or modify existing person records) and add a person with a contingent worker organizational relationship.
Create Person of Interest Tile	HC_HR_PERS_POIJB_ADD_FL_GBL (this is the cref for this tile)	Create a new Person Data and Job Data record with a person of interest (with a job) relationship.
Create Person of Interest Page	SRCH_PERSON_FL	Perform a search for duplicate IDs (with the ability to view or modify existing person records), and add a person with a person of interest (with a job) organizational relationship.
Request Details Page	HR_CREATE_DTL_SCF	Enter a person's ID or employment record number.
Person Data Page	PERSONAL_DATA_FL	Enter personal details, contact information, and regional information about a person in fluid prior to adding the job data for the organizational relationship.
Job Data Page	HR_JOBDATA_ADD_FL	Enter a job instance and work information for a person in fluid.
Job Data Page - Work Location Section	N/A (See the Job Data page)	Enter position and location information for a person's job, including the regulatory region, company, department, and location.

Page Name	***Definition Name***	***Usage***
Job Data Page - Job Information Section	N/A (See the Job Data page)	Enter information about a person's job, including status, employee class, shift, or standard hours.
Job Data Page - Labor Information Section	N/A (See the Job Data page)	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Job Data Page - Salary and Compensation Section	N/A (See the Job Data page)	Enter information about a person's salary plan and compensation information.
Job Data Page - Payroll Section	N/A (See the Job Data page)	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Salary and Compensation page. Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Job Data Page - Employment Data Section	N/A (See the Job Data page)	Enter optional data, such as a worker's business title.
Job Data Page - Benefit Program Section	N/A (See the Job Data page)	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.
Job Data Page - <Drop Zone> Section	N/A (See the Job Data page)	Update custom steps that use drop zones embedded in your activity guide process.
Job Data Page - Attachments Section	N/A (See the Job Data page)	Add or view attachments for a job data row.
Job Data Page - Validation Section	N/A (See the Job Data page)	View error and warning messages related to the Job Data validation process.

Page Name	***Definition Name***	***Usage***
Create <Organizational Relationship> - Summary Page	JOB_DATA_RVW_FL	View the proposed information you are adding for a Person Data and Job Data record prior to submitting the transaction.
Submit Confirmation Page	HR_JOB_ADD_SUB_FL	Confirm that a job data instance was successfully created. You can also initiate adding or modifying person data, creating or view organizational relationships, creating a person checklist, or view or modify job data for an existing person.

Create Employee Tile

Administrators use the Create Employee tile to add a new Person Data and Job Data record with an employee relationship.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin Hire Employee* role.

Navigation:

The Create Employee tile is delivered as part of the fluid Manage Human Resources Dashboard when granted access.

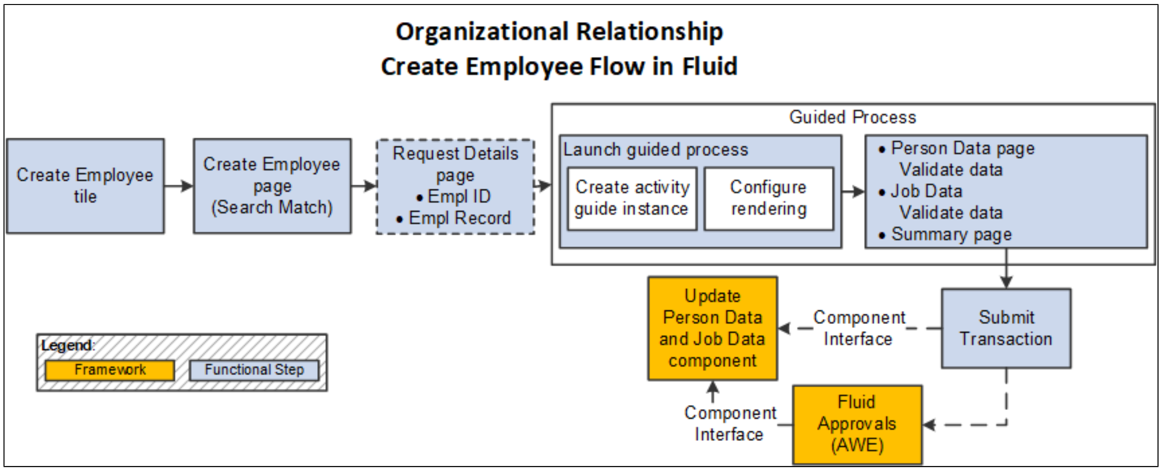
This example illustrates the Create Employee tile

Select this tile to access the Create Employee Page and begin the process to add a new person and job record using fluid.

Create Employee Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly create and process a new person and organizational relationship as an employee:

This diagram shows the high-level functional pages and steps to create a new employee using the fluid pages.



1. Select the Create Employee Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Create Employee Tile**).

2. Use the Create Employee Page to perform the Search/Match process to find potential Person Data matches in the system for this person or initiate the process to add a new person record.

   When using Search/Match, one of the following will occur:

   - *No duplicate found*: the process will continue with the Create Employee process and will move to either the Request Details or Person Data page, depending on your installation settings.

   - *Duplicate found*: the page will display the **Potential duplicates** grid for you to review duplicate person information. Options are available to view and add organizational relationships for a person or view or edit existing person data. If there is no person match, select the **Create Employee** button to continue with the process.

3. The Request Details Page appears if configured to show the employee ID and/or record entry fields.

   Enter the employee ID or leave the field blank to have the system automatically assign the person's ID (see Understanding Identification Assignment).

   For configuration settings, see Person and Job Installation - Person and Organization Page.

4. Continue the to Create Employee activity guide process and enter your data.

   There are three steps in this activity guide:

   - The Person Data Page to enter person details.

     If using auto assignment, the system assigns the person's ID after you submit Person Data. After it is saved, the name and ID will appear in the sub-banner.

   - The Job Data Page to enter job details.

   - The Create <Organizational Relationship> - Summary Page to review the data

See also, Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid.

5. Submit the information to add the Person Data and Job Data records.

   If approvals are enable for the organization relationship, the request will be routed to the approvers for review prior to saving the information to the system.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

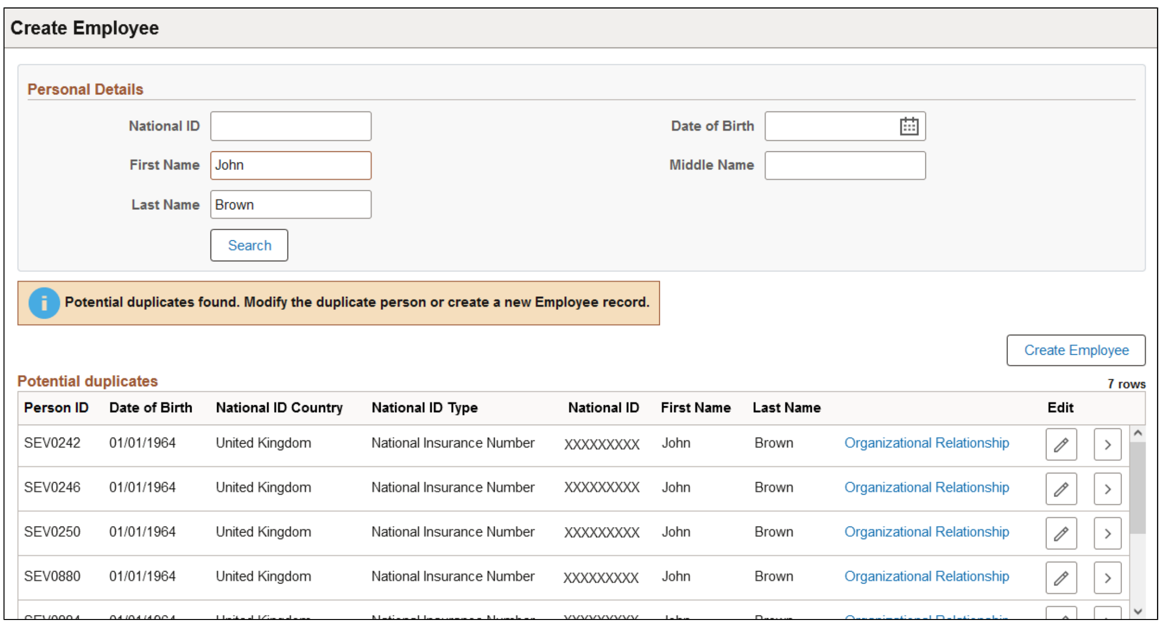
Create Employee Page

Use the Create Employee page (SRCH_PERSON_FL) to perform a search for duplicate IDs (with the ability to view or modify existing person records) and add a person with an employee organizational relationship.

Navigation:

Select the Create Employee Tile on the Manage Human Resources home page.

This example illustrates the Create Employee page.



Note: The Add Person Tile, Create Contingent Worker Tile, and Create Person of Interest Tile access this same page when you select the tile, but the title varies to reflect the transaction you are performing.

For field definitions, see the Add Person Page.

Create Contingent Worker Tile

Administrators use the Create Contingent Worker tile to create a new Person Data and Job Data record with a contingent worker relationship.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin Contingent Worker* role.

Navigation:

The Create Contingent Worker tile is delivered as part of the fluid Manage Human Resources Dashboard when granted access.

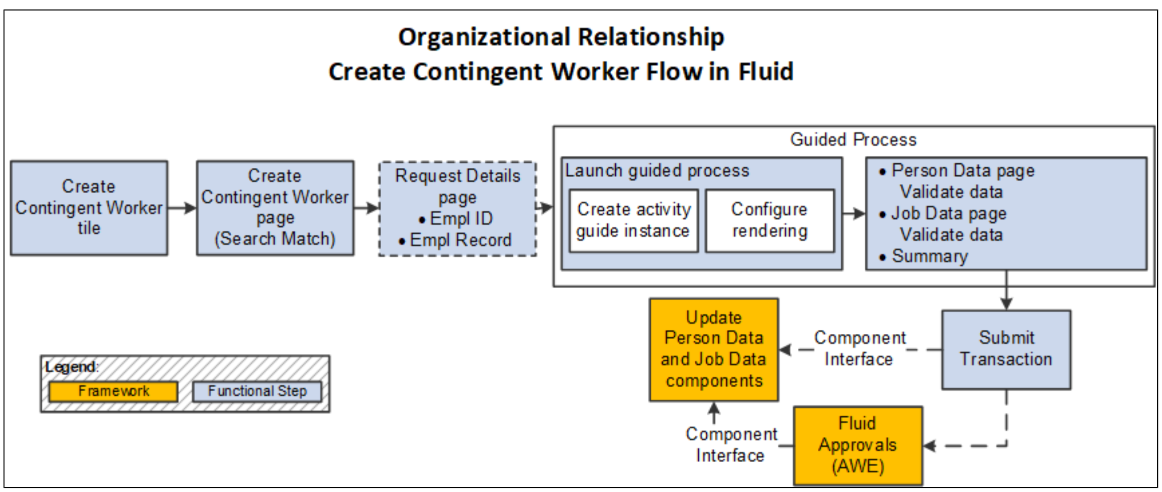
This example illustrates the Create Contingent Worker tile

Select this tile to access the Create Contingent Worker Page and begin the process to add a new person and job record using fluid.

Create Contingent Worker Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly create and process a new person and organizational relationship as a contingent worker:

This diagram shows the high-level functional pages and steps to create a new contingent worker using the fluid pages.



1. Select the Create Contingent Worker Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Create Contingent Worker Tile**).

2. Use the Create Contingent Worker Page to perform the Search/Match process to find potential Person Data matches in the system for this person or initiate the process to add a new person record.

   When using Search/Match, one of the following will occur:

   - *No duplicate found*: the process will continue with the Create Contingent Worker process and will move to either the Request Details or Person Data page, depending on your installation settings.
   - *Duplicate found*: the page will display the **Potential duplicates** grid for you to review duplicate person information. Options are available to view and add organizational relationships for a person or view or edit existing person data. If there is no person match, select the **Create Contingent Worker** button to continue with the process.

3. The Request Details Page appears if configured to show the employee ID and/or record entry fields.

   Enter the employee ID or leave the field blank to have the system automatically assign the person's ID (see Understanding Identification Assignment).

   For configuration settings, see Person and Job Installation - Person and Organization Page.

4. Continue to the Create Contingent Worker activity guide process and enter your data.

   There are three steps in this activity guide:

   - The Person Data Page to enter person details.

     If using auto assignment, the system assigns the person's ID after you submit Person Data. After it is saved, the name and ID will appear in the sub-banner.

   - The Job Data Page to enter job details.
   - The Create <Organizational Relationship> - Summary Page to review the data.

   See also, Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid.

5. Submit the information to add the Person Data and Job Data records.

   If approvals are enable for the organization relationship, the request will be routed to the approvers for review prior to saving the information to the system.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

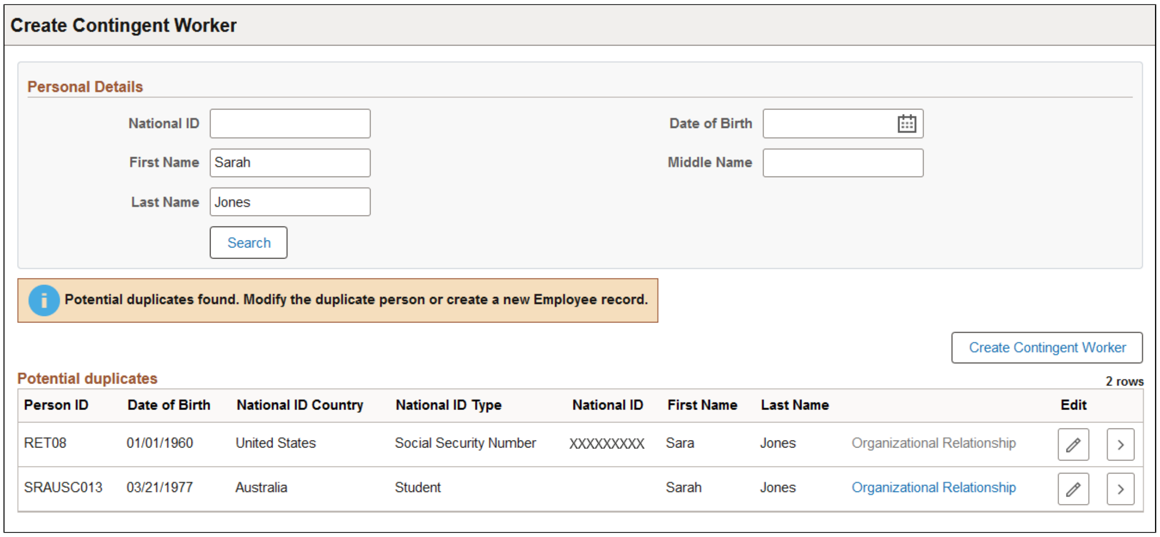
Create Contingent Worker Page

Use the Create Contingent Worker page (SRCH_PERSON_FL) to perform a search for duplicate IDs (with the ability to view or modify existing person records) and add a person with a contingent worker organizational relationship.

Navigation:

Select the Create Contingent Worker Tile on the Manage Human Resources home page.

This example illustrates the Create Contingent Worker page.



Note: The Add Person Tile, Create Employee Tile, and Create Person of Interest Tile access this same page when you select the tile, but the title varies to reflect the transaction you are performing.

For field definitions, see the Add Person Page.

Create Person of Interest Tile

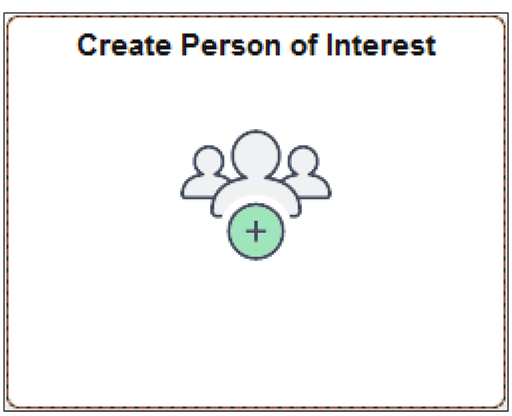
Administrators use the Create Person of Interest tile to create a new Person Data record with a person of interest (with a job) relationship.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin POI Payee* role.

Navigation:

The Create Person of Interest tile is delivered as part of the fluid Manage Human Resources Dashboard when functionality is enabled on the Person and Job Installation - Person and Organization Page.

This example illustrates the Create Person of Interest tile

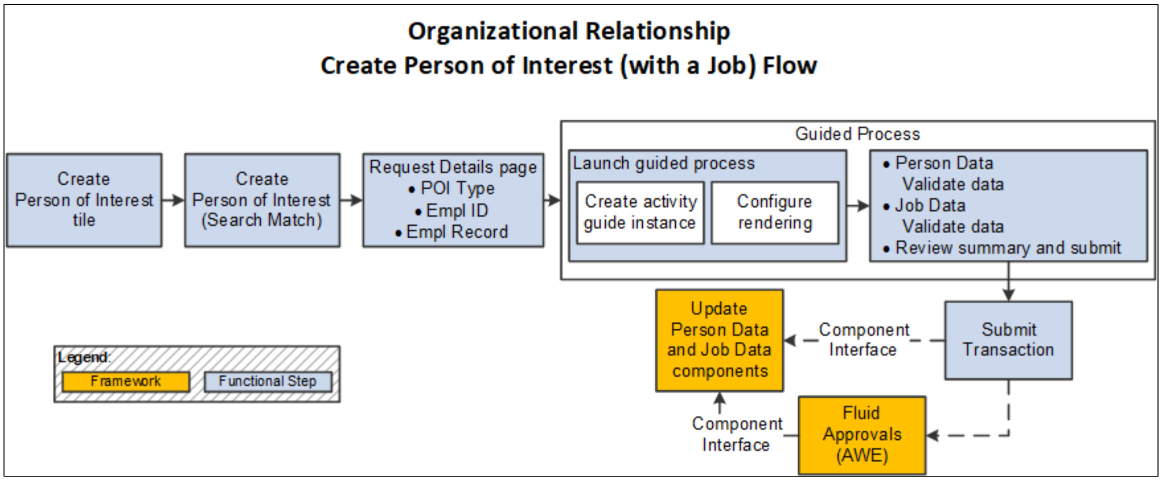


Select this tile to access the Create Person of Interest Page and begin the process to add a new person and job record using fluid.

Create Person of Interest with a Job Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly create and process a new person and organizational relationship as a person of interest (POI) with a job:

This diagram shows the high-level functional pages and steps to create a new person of interest with a job using the fluid pages.



1. Select the Create Person of Interest Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Create Person of Interest Tile**).

2. Use the Create Person of Interest Page to perform the Search/Match process to find potential Person Data matches in the system for this person or initiate the process to add a new person record.

   When using Search/Match, one of the following will occur:

   - *No duplicate found*: the process will continue with the Create Person of Interest process and will move to either the Request Details or Person Data page, depending on your installation settings.

   - *Duplicate found*: the page will display the **Potential duplicates** grid for you to review duplicate person information. Options are available to view and add organizational relationships for a person or view or edit existing person data. If there is no person match, select the **Create Person of Interest** button to continue with the process.

3. Use the Request Details Page to select the person of interest type. The page will also display the employee ID and record entry fields, if configured to show.

   Enter the employee ID or leave the field blank to have the system automatically assign the person's ID (see Understanding Identification Assignment).

   For configuration settings, see Person and Job Installation - Person and Organization Page.

4. Continue to the Create Person of Interest Payee activity guide process.

   There are three steps in this activity guide:

- The Person Data Page to enter person details.

  If using auto assignment, the system assigns the person's ID after you submit Person Data. After it is saved, the name and ID will appear in the sub-banner.

- The Job Data Page to enter job details.

- The Create <Organizational Relationship> - Summary Page to review the data.

  See also, Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid.

5. Submit the information to add the Person Data and Job Data records.

   If approvals are enable for the organization relationship, the request will be routed to the approvers for review prior to saving the information to the system.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

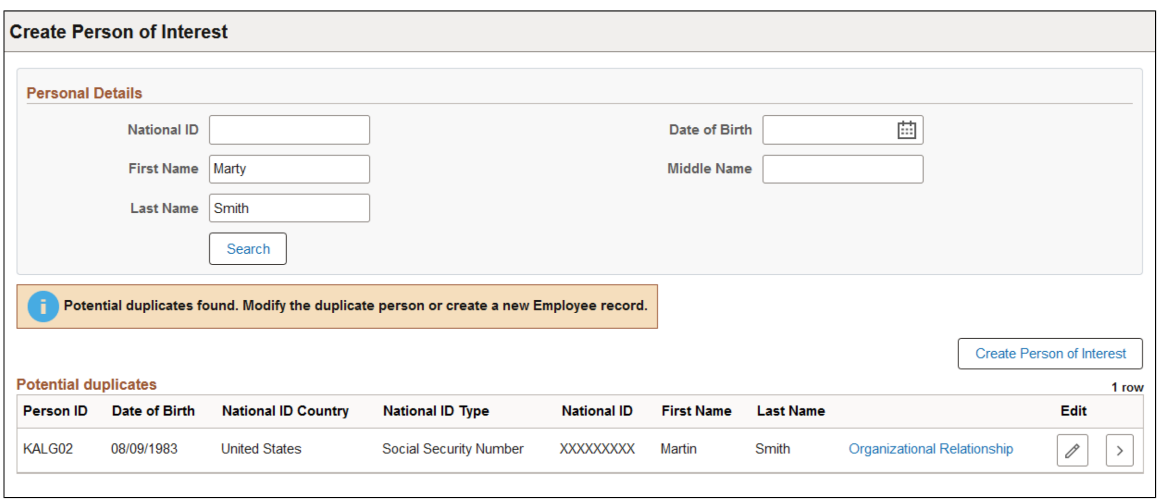
Create Person of Interest Page

Use the Create Person of Interest page (SRCH_PERSON_FL) to perform a search for duplicate IDs (with the ability to view or modify existing person records) and add a person with a person of interest (with a job) organizational relationship.

Navigation:

Select the Create Person of Interest Tile on the Manage Human Resources home page.

This example illustrates the Create Person of Interest page.



Note: The Add Person Tile, Create Employee Tile, and Create Contingent Worker Tile access this same page when you select the tile, but the title varies to reflect the transaction you are performing.

For field definitions, see the Add Person Page.

Request Details Page

Use the Request Details page (HR_CREATE_DTL_SCF) to enter a person's ID or employment record number.

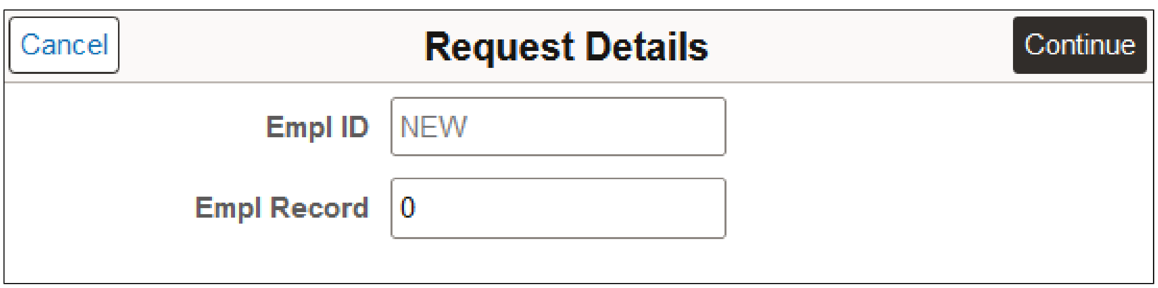
Note: Availability of this page and what it displays is determined by the Person and Job Installation - Person and Organization Page settings for hiding the employee ID or record number. When the configurations are set to hide both the employee ID and employment record number, this page will not appear.

Navigation:

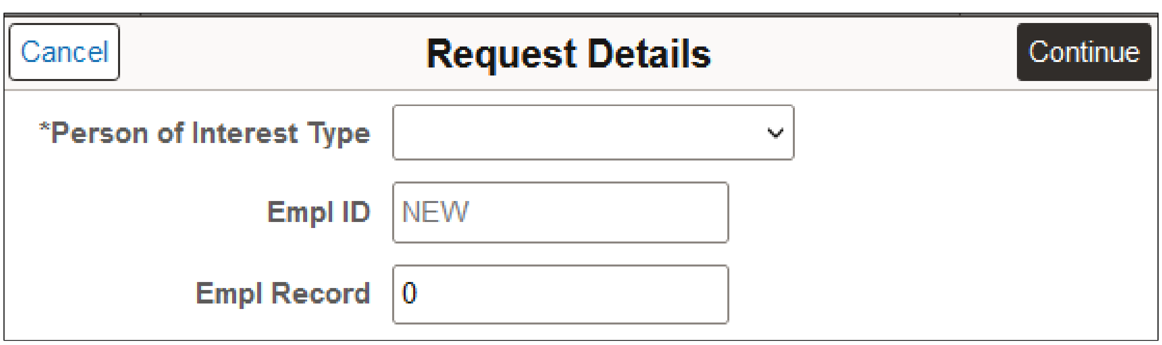
Select one of the following buttons from the Create Employee Page, Create Contingent Worker Page, or Create Person of Interest Page.

- **Search** (when search match is not used)
- **Create Employee**
- **Create Contingent Worker**
- **Create Person of Interest**

This example illustrates the Request Details page when accessed from the Create Employee or Create Contingent Worker tiles.



This example illustrates the Request Details page when accessed from the Create Person of Interest tile.



Note: You can access this same page from the Add Person Page.

For a list of field descriptions, see the Request Details Page in the Adding a Person documentation.

Job Data Page

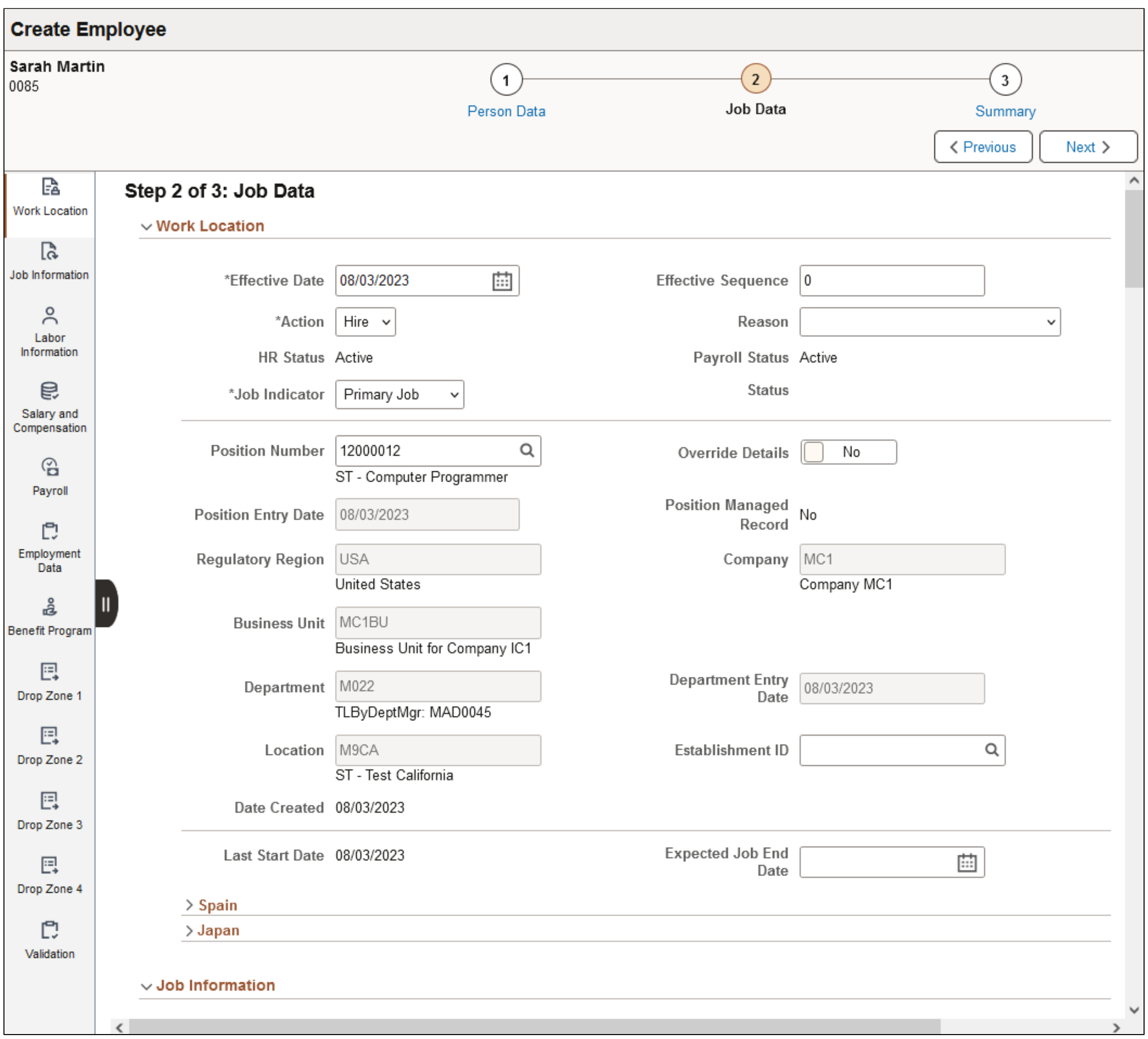
Use the Job Data page (HR_JOBDATA_ADD_FL) to enter a job instance and work information for a person in fluid.

Navigation:

- Select one of these tiles from the Manage Human Resources Dashboard,
  - Create Employee Tile
  - Create Contingent Worker Tile
  - Create Person of Interest Tile

  After completing the Add Person Page, select the **Next** button to move to the Job Data page.
- Select an organizational relationship with a job for a person on the (Fluid) Organizational Relationship Page or (Fluid) Add Organizational Relationship Page and select the **Add Organizational Relationship** button.

This example illustrates the Job Data layout in fluid.



For an explanation of the Job Data page layout when adding a new organizational instance, see the Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid topic.

Use the Section Navigator panel on the left to navigate through the different sections of this page.

- Job Data Page - Work Location Section
- Job Data Page - Job Information Section
- Job Data Page - Labor Information Section
- Job Data Page - Salary and Compensation Section
- Job Data Page - Payroll Section
- Job Data Page - Employment Data Section
- Job Data Page - Benefit Program Section
- Job Data Page - <Drop Zone> Section (when drop zones are configured)
- Job Data Page - Attachments Section (when Attachments are enabled for the organizational relationship type you are adding)
- Job Data Page - Validation Section

Job Data Page - Work Location Section

Use the Work Location section of the Job Data page ((HR_JOBDATA_ADD_FL) in fluid to enter position and location information for a person's job, including the regulatory region, company, department, and location.

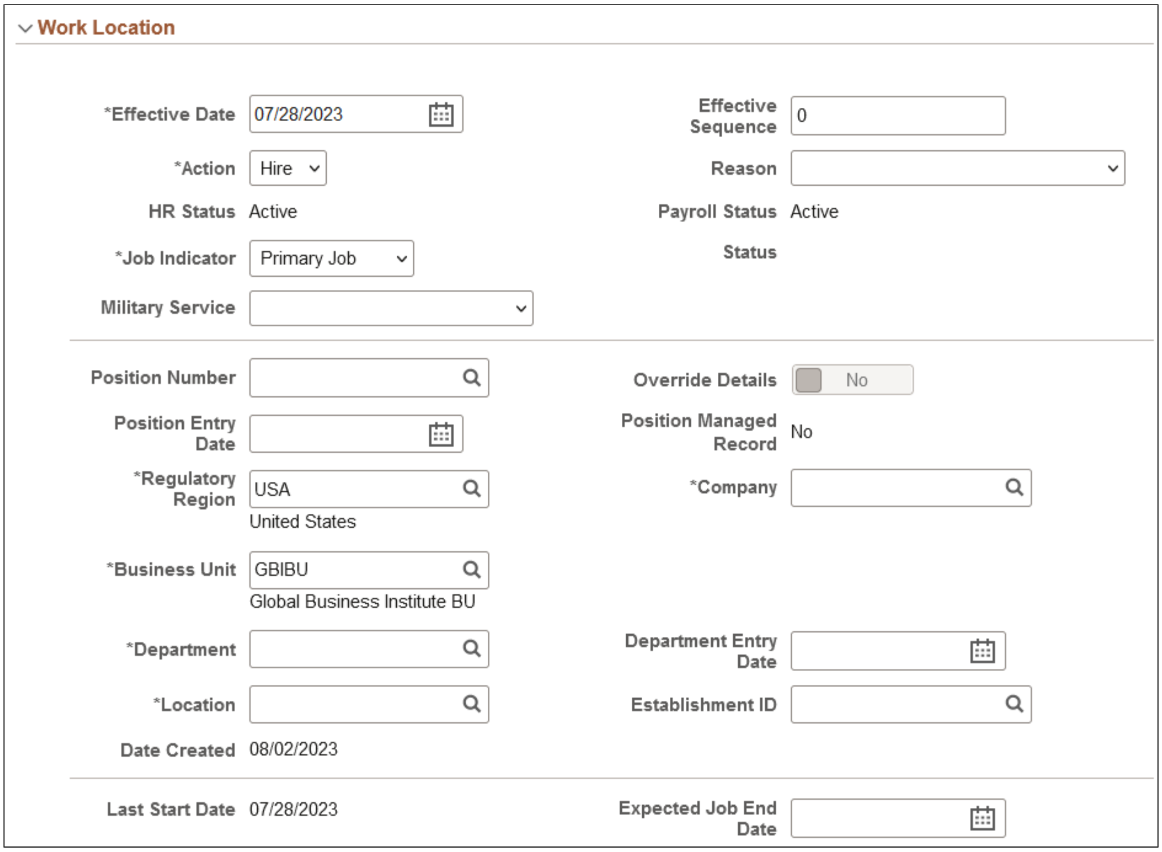
Navigation:

Navigate to the **Work Location** section or page of Job Data in fluid.

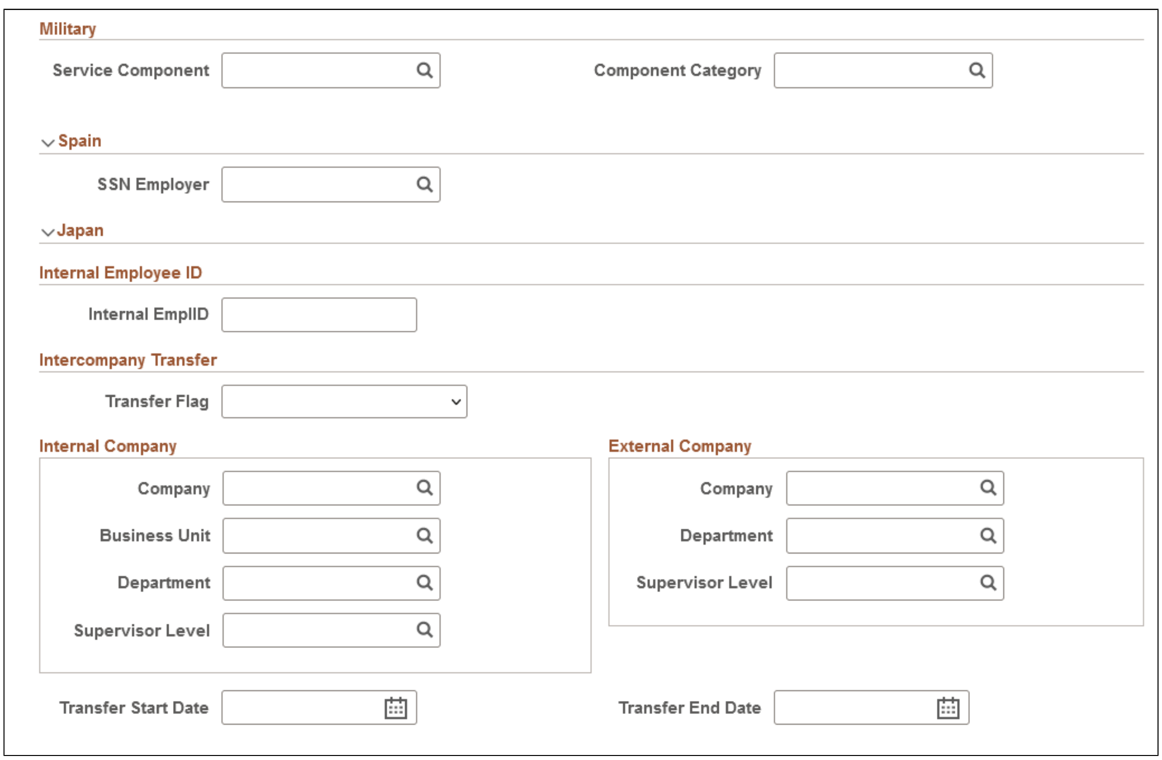
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on the Work Location (1 of 2).



This example illustrates the fields and controls on the Work Location (2 of 2).



Field or Control	***Description***
HR Status	Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.
Payroll Status or **Job Status**	The page displays the **Payroll Status** text for employee employment instances. The page displays the **Job Status** text for contingent worker or POI instances. Displays the payroll status of the current job record. Some changes that you make to this field trigger Retro Pay or Final Check processing. A Retro Pay Request is triggered by any payroll status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee. A Final Check Request is triggered by any payroll status change that's based on one of the action or reason codes that are defined in the Final Check Action/Reason table.
Job Indicator	Indicate whether this is the person's primary or secondary job for this organizational relationship. Select *Not Applicable* if those selections don't apply to this job. This field is used to process people with more than one organizational instance in a single organizational relationship.
Military Service	This field appears when the **Military** check box is selected on the Installation Table and you are adding a new Job Data record, when you are not adding a new Job Data record this field is display only. Select the military service in which the person is serving.

Field or Control	*Description*
Position Number	If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the **Position Number** field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry. PeopleSoft Human Resources issues a warning message if you assign a person to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the **Open/Filled** field in the Add/Update Position Info component when you change assignments. When Manage Primary Incumbent is enabled on the “Position Management Installation Page” (PeopleSoft Human Resources Manage Positions), and you made a change to a person’s position, the system issues a warning message about updating the primary incumbent information and recommends reviewing the “Manage Primary Incumbents Page” (PeopleSoft Human Resources Manage Positions). This happens when: • An employee is no longer the primary incumbent due to a job data change or has an HR or Payroll status change. When an employee leaves the position, the system will use the selection method as defined on the Position Management Installation table to assign a new employee as the primary incumbent. • An employee enters a new position and is assigned the primary incumbent role because the position does not currently have a primary incumbent. The system will also send a push notification to the position administrator to review the Manage Primary Incumbents page. For additional information see “Managing Primary Incumbent Information for a Position” (PeopleSoft Human Resources Manage Positions). **Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications. Notifications delivered with HCM Image 47 or later must use Notification Composer. For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Field or Control	Description
	See also “Creating Positions” (PeopleSoft Human Resources Manage Positions) and “Creating Positions Using Fluid” (PeopleSoft Human Resources Manage Positions).
Override Details	Swipe this option to *Yes* to enter exceptions to the default position data for this person. This opens up the unavailable fields, including **Job Code** and **Department,** and you can override the entries that are in those fields. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. ***Warning!*** When a position override is selected for the purpose of setting a supervisor ID as manager instead of using the defaulted reports to value by leaving it blank, be aware that approval processes that use partial position management will attempt to resolve the position’s reports to manager from the Position Data table before using the supervisor ID supplied in Job Data. The approval process will route the approval to the reports to manager instead of the supervisor. **Note:** If you override the defaults for position-related data, you must maintain the employee data manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless you turn off the override
Position Entry Date	When you enter a position number for this person, the system populates this field with the effective date and this field becomes unavailable for entry. You can override the default by setting the **Override Details** option to *Yes*. If you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2023, the field will update to reflect this rehire date.
Position Managed Record	The system displays *Yes* when you make changes to fields in the Add/Update Position Info component that initiate a system update of fields here. A *Yes* indicates that the system inserted a data row on the Job Data pages.
Regulatory Region	If you have specified a regulatory region for the position you associated with this person, the system enters a default regulatory region and this field becomes unavailable for entry, unless you set the Override Details option to *Yes*. If you have not assigned the person to a position, then the system populates the field by default with the regulatory region for the person, based on your user preferences entered in the Org Defaults by Permission Lst component. You can override the default.

Field or Control	*Description*
Company	If you have specified a company for the position you associated with this person, the system enters a default company and this field becomes unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position and you assigned a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you did not designate a company on the Department table, select a company here. PeopleSoft Payroll for North America requires employees and supported types of persons of interest to be associated with companies that have the correct tax report type, as configured on the Company Table - Tax Details page: • Employees must be associated with companies with tax report type W-2 or W-2PR (W-2 Puerto Rico). • *Other Payee* and *Pension Payee* persons of interest must be associated with companies with tax report type 1099R. • *Student Refund* persons of interest must be associated with companies with tax report type Non-Employees or None. See “(USA) Tax Details Page” (Application Fundamentals).
Business Unit	If you have specified a business unit for the position you associated with this person, the system enters a default business unit and this field becomes unavailable for entry, unless you set the Override Details option to *Yes*. If you have not assigned the person to a position, then the system populates the field by default with the business unit for the person, based on your user preferences. You can override the default. The business unit that you assign to the person on this page and the setID functionality in PeopleSoft Human Resources Management affect the way that default values work throughout the PeopleSoft Human Resources system. Your entry in this field controls the departments, locations, job codes, salary plans, and so on that you see on the remaining Job Data pages.

Field or Control	*Description*
Department	If you have specified a department for the position you associated with this person, the system enters a default department and this field becomes unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position, select the department code for this person. When you leave the field, the system inserts a default supervisor or reports to ID on the Job Information section or page if you entered a default supervisor or reports to ID for this department in the Department table. The system enters default values for the following fields on the Payroll page: **Employee Type** and **Pay Group** (which you associate with a company in the Company table). Depending upon other data setup, the system might enter a default holiday schedule. See “Setting Up Holiday Schedules” (Application Fundamentals). **Note:** Because this page can contain multiple data rows, the system doesn't always warn you that you must complete the **Department** field. However, if you change data in another field on the page, the system issues a warning and won't let you leave the field until you select a department code.
Department Entry Date	If you have specified a department for the position you associated with this person, the system enters a default department entry date and this field becomes unavailable for entry, unless you set the **Override Details** option to *Yes*. When you leave the **Department** field, the system displays the date on which the person is first assigned to this department. However, if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2023, the field will update to reflect this rehire date.

Field or Control	*Description*
Location	If you have specified a location for the position you associated with this person, the system enters a default location and this field becomes unavailable for entry, unless you set the **Override Details** switch to *Yes*. If you have not assigned the person to a position and you assigned a location to a department in the Department table, the system displays the department location, if the default location setID that you define in the Department table matches the control location set ID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code. If you did not designate a location on the Department table, select a location here. **Note:** For workers paid through PeopleSoft Payroll for North America, the location that appears here does not determine the person's primary work state and location that appear on the paysheets. You specify that information by selecting a tax location code on the Payroll page.
Establishment ID	Select the person's establishment. Establishments are used for several countries for local regulatory reporting. These reports require that each person be assigned to a single establishment. Establishments in regulatory regions other than USA have a one to one relationship with locations. **Note:** (USA) In the USA regulatory region, there is a many to many relationship between locations and establishments. USA regulatory reports require that you associate an establishment ID with a person at the job level. **Note:** (FRA) For payroll purposes, you must always assign persons to an establishment. If a person is assigned to a position, the system enters the establishment ID that is associated with the position and makes the field unavailable. If you associate a non-French position with a French person, the field remains available for entry.
Date Created	Displays the date on which you enter this record.
Last Start Date	Enter the most recent start date for this organizational instance.

Field or Control	*Description*
Expected Job End Date and **Expected Return Date**	Enter the end date or return date for this job, if known. If you don't know the date initially, you can enter it later. If this job is a temporary assignment and you do not enter a date in the **Expected Job End Date** field, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold. The system displays the day before the termination effective date as the termination date.
End Job Automatically	Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if the organization uses this feature. You can use this feature only if the **Automatic Job Termination** check box is selected on the Installation Table - Product Specific page.
Last Date Worked and **Override Last Date Worked**	The system displays the day before the termination effective date as the last date worked. These fields display when you have indicated an action that will inactivate or suspend a job. If you rehire the person, the system deselects these fields. When a person returns from leave, the system deselects only the **Last Date Worked** field. If the date is not accurate, select **Override Last Date Worked** to enter the date.

Military

The Military section is available when military is enabled on the Installation Table. Valid values for the service component and component category of the person depend upon the military service you enter at in the Work Location section or page.

Field or Control	*Description*
Service Component	Indicate the employee's service type for their military service, such as regular, activity reserve, and so forth.
Component Category	Enter a service component category to further define for the service component for this person.

(ESP) Spain

Field or Control	*Description*
SSN Employer (social security number for employer)	Enter the company SSN, as assigned by the Spanish government, that applies to this person.

(JPN) Japan

Field or Control	*Description*
Internal EmplID (internal employee ID)	Enter the person's internal ID. You can store an internal emplID if the company uses meaningful employee IDs, and those IDs themselves need to change with certain employee data changes such as employment type changes. Internal EmplIDs also appear on the JPN Job Summary page, and you can search the system by internal EmplID. See Understanding Identification Assignment.

(JPN) Intercompany Transfer

This region enables you to specify intercompany transfer (shukkou) data for Japan. Enter information about the company and department that the person is transferring to or from in the appropriate group box, **Internal Company** or **External Company** values for the **External Company** group box are set up on the Set Up Company/Dept Codes and Set Up Supervisor Level Codes pages.

Field or Control	*Description*
Transfer Flag	Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany transfer-related action or action reason codes to check the validity of the entries. Values are: • *Home Company Information:* Select if another company's worker joins the company in an intercompany transfer. • *Host Company Information:* Select if one of the workers is on intercompany transfer to another company. Select the blank value at the top of the list to remove all entries.

Field or Control	***Description***
(Internal Company or External Company) **Company**	Select the home or host company. The home or host company ID is a prompt value from the Company component (for internal company transfers) and the Set Up Company/Dept Codes page (for external company transfers).
Business Unit	Select the home or host business unit for internal company transfers only. Your entry in this field controls the Department and Supervisor Level field values in the **Internal Company** group box due to setID functionality for business units.
(Internal Company or External Company) **Department**	Select the home or host department. The home or host department ID is a prompt value from the Departments component (for internal company transfers) and the Set Up Company/Dept Codes page (for external company transfers).
(Internal Company or External Company) **Supervisor Level** (external supervisor level)	Select the home or host supervisor level. This value is a prompt value from the Supervisor Lvl Table component (for internal company transfers) and the Set Up Supervisor Level Codes page (for external company transfers).
Transfer Start Date	If you enter host data, enter the start date of this intercompany transfer. Don't enter a date if the action is *RET* (retirement) and the reason is *PIT* (permanent intercompany transfer).
Transfer End Date	If you enter host data, enter the expected end date of this intercompany transfer. Don't enter a date if the action is *RET* and the reason is *PIT.* The end date must be equal to or later than the effective date of the worker's current job record.

Related Links

“Defining the Final Check Process” (PeopleSoft Payroll for North America)
Understanding Additional Appointments
Understanding Intercompany Transfer Tracking
Running Job Data Reports
“Understanding PeopleSoft HCM System Data Regulation” (Application Fundamentals)
“Understanding Regulatory Regions” (Application Fundamentals)
“Entering Company Information” (Application Fundamentals)
“Understanding Retro Pay Processing” (PeopleSoft Payroll for North America)

Job Data Page - Job Information Section

Use the Job Information section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to enter information about a person's job, including status, employee class, shift, or standard hours.

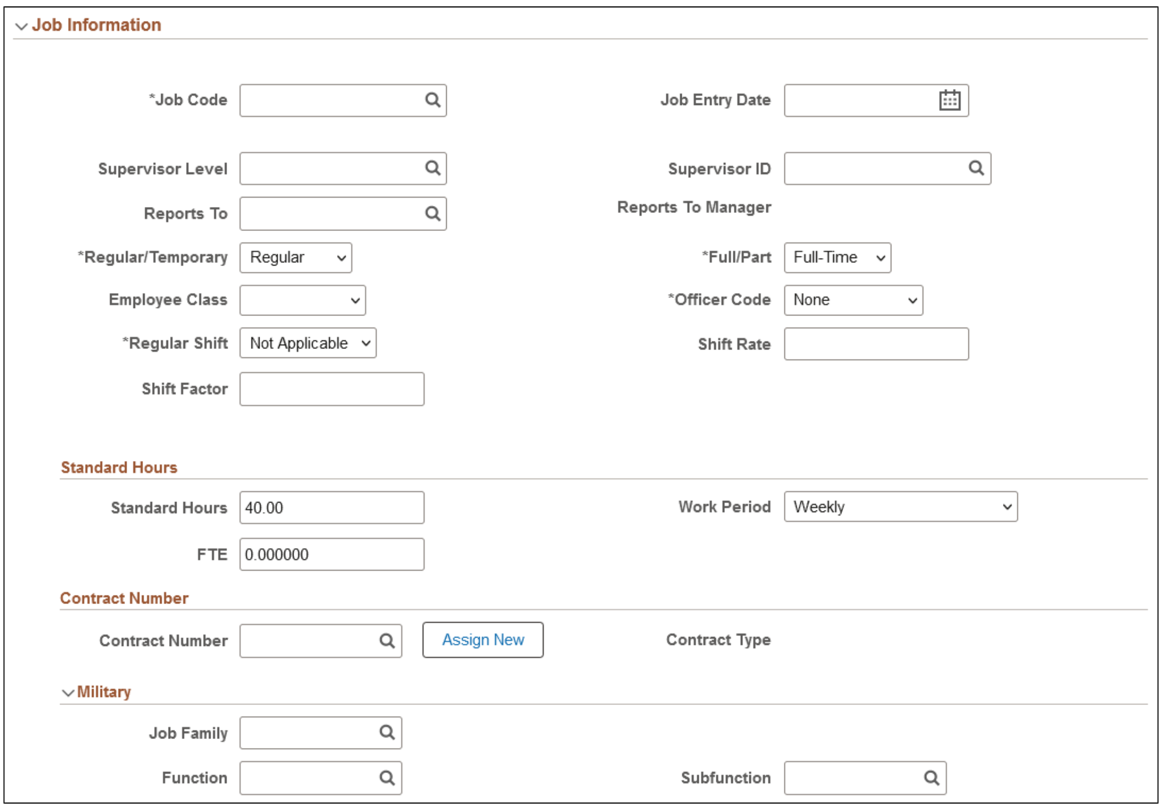
Navigation:

Navigate to the **Job Information** section or page of Job Data in fluid.

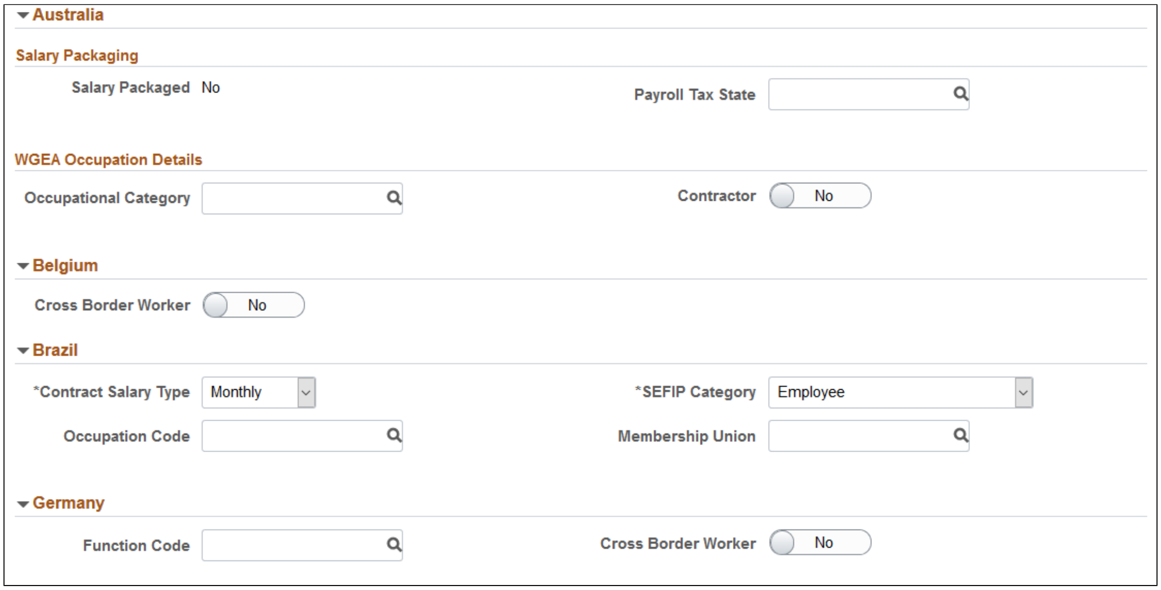
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

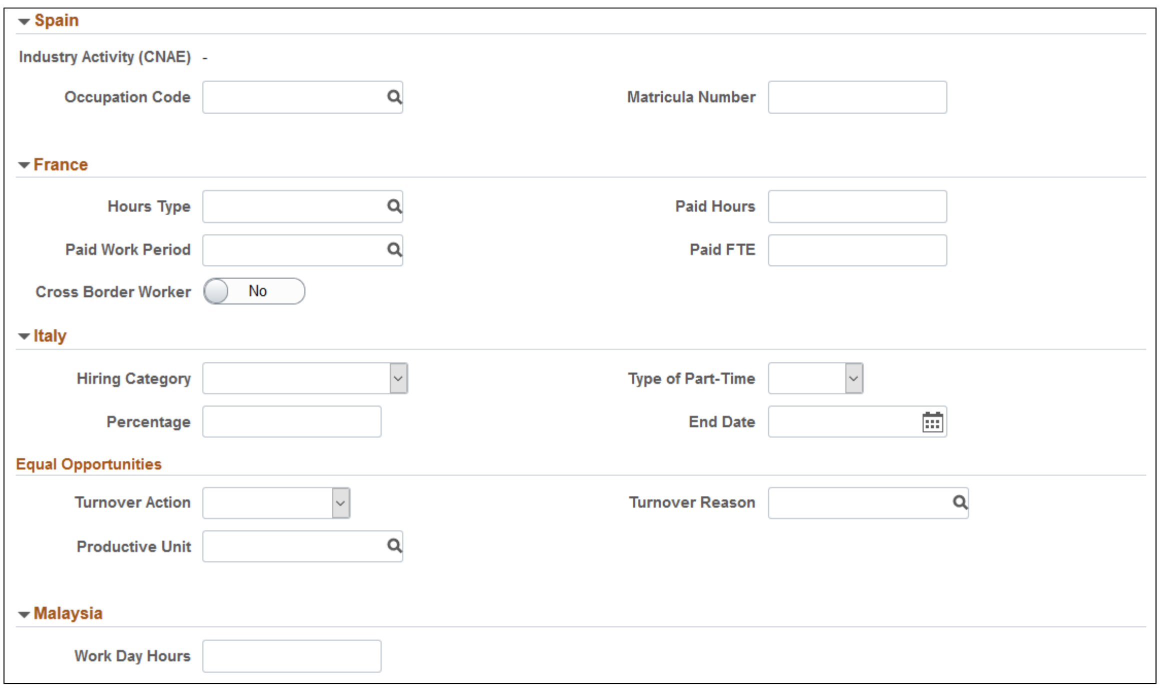
This example illustrates the Job Information (1 of 4).



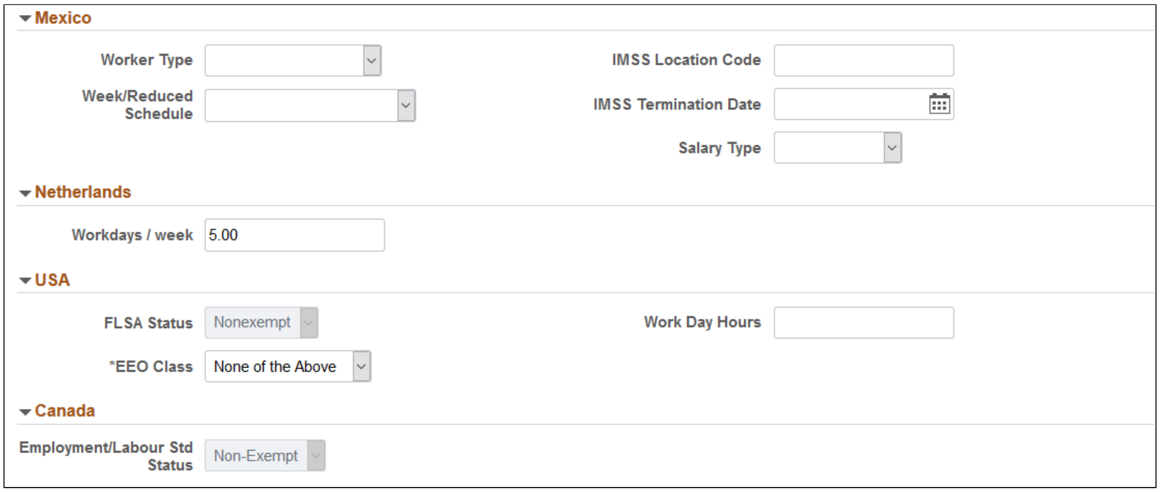
This example illustrates the Job Information (2 of 4).



This example illustrates the Job Information (3 of 4).



This example illustrates the Job Information (4 of 4).



Note: Many values on this page come from the value that you entered in the **Department** field on the Work Location section or page. You can override most of these default values.

Field or Control	***Description***
Job Code	If you have specified a job code for the position you associated with this person, the system enters a default job code and this field becomes unavailable for entry, unless you set the **Override Details** option to *Yes* in the Work Location section or page. If you haven't assigned the person to a position, select the job code for this person. **Note:** If you are attaching this person to a labor agreement in the Labor Information section or page and that labor agreement is associated with job codes, you must select a job code that is valid for the labor agreement. PeopleSoft Payroll for North America uses this field to create a pay line on a person's paysheets. The system creates a pay earnings record for each active job code on the person's employment record. See "Job Codes Page" (PeopleSoft Human Resources Manage Labor Administration).
Job Entry Date	When you leave the **Job Code** field, the system displays the date on which the person is first assigned to this job code. However, if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2020, the field will update to reflect this rehire date. If you are using position management, this field is unavailable for entry, unless you set the **Override Details** option to *Yes* in the Work Location section or page.

Field or Control	*Description*
Supervisor Level	Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier. If you have specified a supervisor level for the position you associated with this person, the system enters a default supervisor level and this field becomes unavailable for entry, unless you set the **Override Details** option to *Yes*. If you did not assigned the person to a position, select the supervisor level code for this person, if applicable. See Defining Additional Employment Setup Data.
Supervisor ID	When using full Position Management, this field is unavailable. The system will use the **Reports To** field, which the position provides by default. When using partial or no Position Management, this field is available, however, the system will not allow you to save the page when there are values in both the **Supervisor ID** and **Reports To** fields. If you want to enter a supervisor ID when using partial Position Management and a person is assigned to a position, set the **Override Details** option to *Yes* on the Work Location section or page to enable the **Reports To** field and remove the value that is provided from the position number. If you have not assigned the person to a position and you assigned a manager ID to a department in the Department table, a default supervisor ID appears. If you did not designate a manager ID on the Department table, enter a supervisor ID here, if applicable. **Note:** Specify the person's department code before you enter a new supervisor ID. If you enter a supervisor ID before you select a department code, the system overrides the ID each time that you enter or change the person's department.

Field or Control	*Description*
Reports To and **Reports To Manager** or **View Current Incumbents** link	Displays the position number, title, and name of the manager associated with this position. When the Manage Primary Incumbent functionality is enabled on the “Position Management Installation Page” (PeopleSoft Human Resources Manage Positions), a View Current Incumbents link will appear instead of the Reports To manager’s name. Click the View Current Incumbents link to access the Current Incumbents to view the incumbents for the Reports To position. When there are no incumbents assigned to this Reports To position, the page will issue a message stating that there are no current incumbents to view. If you have specified a reports to number for the position you associated with this person, the system enters the default value and this field is unavailable for entry, unless you set the **Override Details** option to *Yes*. ***Warning!*** When a position override is selected for the purpose of setting a supervisor ID as manager instead of using the defaulted reports to value by leaving it blank, be aware that approval processes that use partial position management will attempt to resolve the position’s reports to manager from the Position Data table before using the supervisor ID supplied in Job Data. The approval process will route the approval to the reports to manager instead of the supervisor. If you have not assigned the person to a position and you assigned a reports to ID to a department in the Department table, a default reports to ID appears. If you did not designate a reports to ID on the Department table, enter a reports to ID here, if applicable.
Regular/Temporary	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position, the system displays the default value from the Job Code Table. You can override this value.

Field or Control	***Description***
Full/Part	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position, indicate whether the worker is full-time or part-time. **Note:** The Manage Base Benefits business process uses the values that you select in the **Regular/Temporary** and **Full/Part** fields to determine eligibility requirements. PeopleSoft Payroll for North America uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, Payroll for North America prorates the holiday hours for part-time workers. However, proration is based on the standard hours for the worker, not for the pay group.
Employee Class	Select an employee class, which provides another method of grouping workers. Examples may include *Assignee, Expatriate,* or *Intern.* Employee classes are included in the Employee Class table. To override, access this page in correction mode. The list of values depends on the regulatory region that is specified in the Work Location section or page and the setID values entered in the Employee Class component. **Note:** (CHN) Select the **Regular/Temporary** field value first and then select the corresponding **Empl Class** value to enable the company to sort employees correctly. If you select the **Regular/Temporary** value of *Regular,* then you should leave the**Empl Class** field empty. Normal global payroll taxes will be calculated for the employee. (If you select *Regular* for **Regular/Temporary** and *Instructor* for Empl Class, you can still save the data, but the company will be unable to sort employees correctly or calculate the correct employee number.) If you select *Temporary* for the **Regular/Temporary** value, then you can select any of the **Empl Class** values *(Consultant, Contractor, Instructor, Intern,* or *Others)*. Remuneration services tax will be calculated in this case. (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of workers. If the organization submits this report, you must use the required employee classes for the report to work correctly. (JPN) Select *Host ICT* (Hosting Intercompany Transfer) to flag those workers that are hired on an intercompany transfer basis when the company is the host company. See “Understanding U.K. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements).

Field or Control	*Description*
Officer Code	Identify highly compensated workers for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is *None.*
Regular Shift	Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you set the **Override Details** option to *Yes*. If the worker is working shifts, select the appropriate shift. If the worker doesn't work shifts, leave the **Shift Rate** and **Factor** fields blank. The default value is *N/A* (not applicable).
Shift Rate and **Shift Factor**	If you selected the **Specified at Employee level** option on the Shift table, enter the shift differential for this worker and job. Enter the shift differential as a rate (flat amount), a factor (percentage), or both. Use the first field to enter a flat amount and the second field to enter a percentage. **Note:** To apply the same shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. If you specify the differential on the Shift table, the system does not use shift rate information from Job data. See “Understanding HCM Information Used in the Payroll Process” (PeopleSoft Payroll for North America) and “Understanding Tables That Support the Payroll Process” (PeopleSoft Payroll for North America).
Classified Ind (classified indicator)	(E&G) This field is visible only for departments that have been set up to use commitment accounting. Departments are configured to use commitment accounting on the Comm. Acctg and EG page in the Department component. Associate the position with an FTE Classification (full time equivalents classification) that you established on the Department Budget FTE page.
Duties Type	For jobs where the action or reason is temporary assignment, select the type of duties for the temporary assignment from the Temporary Duties Type table. You can use this feature only if the **Automatic Job Suspension** check box is selected on the Installation Table - Product Specific page.
Encumbrance Override	(E&G) Select to override encumbrance processing at the job level when you create a new organizational instance or add a concurrent job for a worker date if the department uses Commitment Accounting.

Standard Hours

The standard hours fields defaults from the position number you associated with this person, and these fields are unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position or set the **Override Details** option to *Yes* and change the job code, then the system populates the fields by default from the job code. You can override the defaults.

Field or Control	***Description***
Standard Hours	Displays by default the standard hours for the worker. Change the default value, if required.
Work Period	Select a standard work period, the time period during which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full-time equivalency.
FTE (full-time equivalency)	Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.
Combined Std Hours (combined standard hours) and **FTE**	Displays the total standard hours that are assigned to the worker for all active jobs combined and the worker's total FTE status for all active jobs combined. For example, if a worker holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the worker's combined FTE is .85 *(.5 + .35)*. You can't change or delete this information. **Note:** The combined FTE that appears here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of a worker's individual FTEs from active jobs only.

Contract Number

Field or Control	*Description*
Contract Number and **Assign New**	Select the worker's contract number or click the **Assign New** to associate a contract with a person, if applicable. **Note:** Existing contracts that have a value in the **End Date** field (the system displays this field on the prompt page) are not valid selections. The system populates the contract end date when the contract is terminated. If you know when the contract will end, enter the date in the Contract Expected End Date on the Contract Status/Content page. **Note:** (ESP and FRA) This is a required field when the action is hire, rehire, or transfer for workers who belong to a Spanish or French regulatory region. View the prompt values in the **Contract Number** field to view all active contracts for that worker. If the worker has no active contracts in the system, click the **Next Contract Number** button; the system assigns a new contract number. When you save, the system warns you that you must update the contract information for the new contract number that is automatically created for this worker. Access the Contract Data component using the new contract number, and make the necessary updates. **Note:** (BRA) When you enter a contract number and saves the page, a PeopleCode is run to populate the contract type on the (BRA) Additional Contract Data Page for the worker based on these scenarios: If a contract number is specified and the contract type is populated, the system takes the contract type and identifies the associated legal contract type that is set up on the Legal Contract Type Page of the Legal Contract Type component. If no contract number is specified, or if a contract number is specified but the contract type is not available, the system takes the employee class from the Job Information section or page, and identifies the associated legal contract type that is set up on the By Employee Classification Page of the Legal Contract Type component. The identified legal contract type is then populated to the Additional Contract Data page as the contract type.
Contract Type	Displays the contract type that is associated with the contract number that you select.

See Tracking Workforce Contracts.

Military

The Military check box must be selected on the Installation Table to view this section.

Information in this military section enables you to define an occupational group at the service member level to quickly identify which service members actually have specialty areas, such as a physician that is an orthopedic surgeon. Additionally, Australia Defense also uses job families, functions and subfunctions to derive pay for the service member. In Canada, a member with a particular specialty, for example, a light-wing pilot, may be paid an additional allowance. These values do not come from the job code.

Field or Control	***Description***
Job Family	Select a job family to categorize the job for this service member.
Function	Select the code that best categorizes the job for this person by function, such as administrative, legal, or management. If you change the job family after entering the function, this field will be deselected.
Subfunction	Enter a subfunction to further categorize the job function. If you change the job family for function after entering the subfunction, this field will be deselected.

(AUS) Australia - Salary Packaging

Field or Control	***Description***
Salary Packaged	Select to transfer the worker's salary packaging information into the job data component.
Payroll Tax State	Enter the code for the state in which the worker is paid and for which the organization pays the payroll tax.

(AUS) Australia - Higher Education

These fields are required for DETYA reporting and appear only if the **Australian Education & Government** check box is selected on the Installation Table - Country Specific page.

Field or Control	***Description***
Annual Contact Hours	Enter the calculated annual contact hours for this worker.

Field or Control	*Description*
Type of Appointment and **Appointment Duration**	Select the type of appointment. If you select *Limited,* enter an appointment duration.
Teaching Weeks	Enter the number of teaching weeks for this worker.
Job Classification	Select the DETYA job classification.

(AUS) Australia – WGEA Occupational Details

Field or Control	*Description*
Occupational Category	Select the occupational category. This field enables you to override a worker's occupational category with another one that is different from the occupation category configured through the ASCO code and Jobcode.
Contractor	Swipe the option to *Yes* if the worker is a contractor.

(BEL) Belgium

Field or Control	*Description*
Cross Border Worker	Indicate *Yes* if the person lives in one country and works in another. These people have special tax and social security needs.

(BRA) Brazil

Field or Control	*Description*
Contract Salary Type	Enter the contractual salary code for RAIS.
SEFIP Category	Select the worker category for SEFIP.
Occupation Code	Specify the occupation code based on the Brazilian Code of Occupation (CBO). This is required for Brazilian workers. Brazilian occupation codes are defined on the CBO Codes BRA Page.

Field or Control	Description
Membership Union	Enter the union code that details how to calculate and pay the worker's monthly union dues.

(DEU) Germany

Field or Control	Description
Function Code	Select the appropriate code for the worker.
Cross Border Worker	Indicate *Yes* if the person lives in one country and works in another. These people have special tax and social security needs.

(ESP) Spain

Field or Control	Description
Industrial Activity (CNAE)	Displays the social security number (SSN) employer assigned to the employee. This industrial activity code defines the percent to calculate contributions for work-related accidents and occupational disease
Occupation Code	Assign a specific occupational code from the list provided by Social Security if the industry activity done by the employee doesn't match the general activity defined for the social security number he is assigned to. This occupational code determines the percent to calculate contributions for work-related accidents and occupational disease. **Note:** This information replaces the social security risk code.
Matricula Number	Enter enter a matricula number. The Spanish government requires every worker to have a matricula number. Employers use this number to compile a matricula book that reports workplace statistics to the government. You maintain matricula numbers in the Location table.

(FRA) France

Field or Control	***Description***
Hours Type	Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours. This field is for information only. No payroll calculation is based on information in this field.

This table provides hour type descriptions:

Hours Type	***Description***
3 × 8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can continue around the clock. The production workers are split into three groups with each group working one after the other, eight hours a day. Periodically the workers shift to another group. Shift workers who are working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints to a worker's personal life, these workers are often paid a shift bonus.
2 × 8	A shift work pattern that is similar to the 3 × 8 option, except that there are two work shifts instead of three.
STA	Work hours follow a regular pattern using the job's standard hours as indicated on the Job Data - Job Information section or page.
IND	Work hours follow a regular pattern that is different from the company's default standard hours. Indicate the number of hours in the **Standard Hours** field on the Job Data - Job Information section or page.

Field or Control	***Description***
Paid Hours	Displays the number of hours for which the worker is paid. The system enters the value that is defined for standard hours (defined for the job code for this worker) as the default in this field only for workers who are part of a French regulatory region.

Field or Control	*Description*
Paid Work Period	Select the period in which the worker should work. If the regulatory region to which the worker is assigned is French, the system inserts the work period that is defined on the Job Code Table - Job Code Profile page as the default value. Values are: *A:* Annual *B:* Biweekly *C:* Contract *D:* Daily *F:* Every four weeks *M:* Monthly *Q:* Quarterly *S:* Semimonthly *W:* Weekly
Paid FTE	Displays the ratio of the paid hours to the standard hours reference for workers whose regulatory region is French. The system calculates and inserts a value for this field.
Cross Border Worker	Swipe to *Yes* if the person lives in one country and works in another. These people have special tax and social security needs.

(ITA) Italy

Field or Control	*Description*
Hiring Category	If the worker is hired from a special hiring category, indicate the category here. Values are: *CIG, Mobility, Protected, Unemployed,* and *Weak Wrap.*
Type of Part-Time	If the worker is part-time, indicate the type. Values are: *Cyclic* (employed only for a certain period of the year, either full or reduced hours), *Horizontal* (employed five days per week with fewer than full-time hours), and *Vertical* (employed full-time on certain days but fewer than 40 hours per week).

Field or Control	*Description*
Percentage	Define the percentage of part-time.
Turnover Action	Select the turnover action (for example, *Layoff* or *Termination)* causing the change in the worker's job. The value that you enter appears in the Equal Opportunities reports.
Turnover Reason	Select the reason for the turnover action. The value that you enter appears in the Equal Opportunities reports.
Productive Unit	Select the worker's productive unit. You use productive units to group workers based on agreements between unions and employers.

(MYS) Malaysia

Field or Control	*Description*
Work Day Hours	Enter the standard workday hours that are used for payroll and leave calculations.

(MEX) Mexico

It is common in Mexico to have two termination dates: the original termination date and the IMSS termination date.

The company must notify IMSS of a worker's termination date five days after the worker leaves. However, there are some exceptions to this rule, such as when a worker is on disability and does not return to the company.

Field or Control	*Description*
Worker Type	Define the person's worker type. Values are: *Construction Eventual, Eventual Worker,* and *Permanent Worker.* This field is used for reporting the type of worker to the SUA.
IMSS Location Code	Specify the location code. This field is used to indicate the location of the worker to the SUA.

Field or Control	***Description***
Week/Reduction Schedule (reduced weekly schedule)	Specify the reduced work schedule for the worker. Values are: *1 Day per Week, 2 Days per Week, 3 Days per Week, 4 Days per Week, 5 Days per Week, Complete Week,* and *Workday Less than 8 Hours.*
IMSS Termination Date	Enter the IMSS termination date.
Salary Type	Select the salary type that the worker receives. Values are: *All Salaries, Fixed Salary, Mixed Salary,* and *Variable Salary.* This field is used for reporting to the IMSS.

(NLD) Netherlands

Field or Control	***Description***
Workdays / week	Enter the average number of working days per week. The default value is *5,* reflecting a full-time job. Enter *0* for standby workers who are only working on demand. You receive a warning if the number of working days is inconsistent with the full- or part-time parameter. **Note:** From January 1, 2006, PeopleSoft Global Payroll for the Netherlands no longer uses this field to calculate social security premiums for part-time workers. For further information refer to the *PeopleSoft Global Payroll for the Netherlands* documentation.

(GBR) UK

The following fields appear only if PeopleSoft Global Payroll for the U.K. is not installed.

Field or Control	***Description***
Tax Code	Enter the worker's tax code for the current tax year.
Tax Basis	Select the basis that is used to calculate the worker's tax.

(USA) United States of America

Field or Control	***Description***
FLSA Status (Fair Labor Standards Act status)	FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration. The FLSA status defaults from the position number you associated with this person, and this field is unavailable for entry, unless you set the **Override Details** option to *Yes*. If you have not assigned the person to a position or you set the **Override Details** option to *Yes* and change the job code, then the system populates the fields by default from the job code. You can override the defaults
Work Day Hours	Enter the workday hours. The workday hours information is used in the FLSA calculation for the basic rate formula.
EEO Class (Equal Employment Opportunity class)	Displays a regulatory status for this job based on the job code that you assign the worker.

(CAN) Canada

Field or Control	***Description***
Employment/Labour Std Status (employment and labour standards status)	Use this field to indicate whether the job is *Exempt* or *Non-Exempt* according to the provincial Employment Standards Act or Labour Standards Act. If you supply a job code but not a position number, the default value comes from the job code, and the field remains editable. If you supply a position number, the default value comes from the position, and the field becomes read-only unless you set the **Override Details** option to *Yes* in the Work Location section or page.

Related Links

PeopleSoft Global Payroll

“Understanding Frequency IDs” (Application Fundamentals)

“Defining Job Subfunction and Job Function Codes” (Application Fundamentals)

“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)

Job Data Page - Labor Information Section

Use the Labor Information section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.

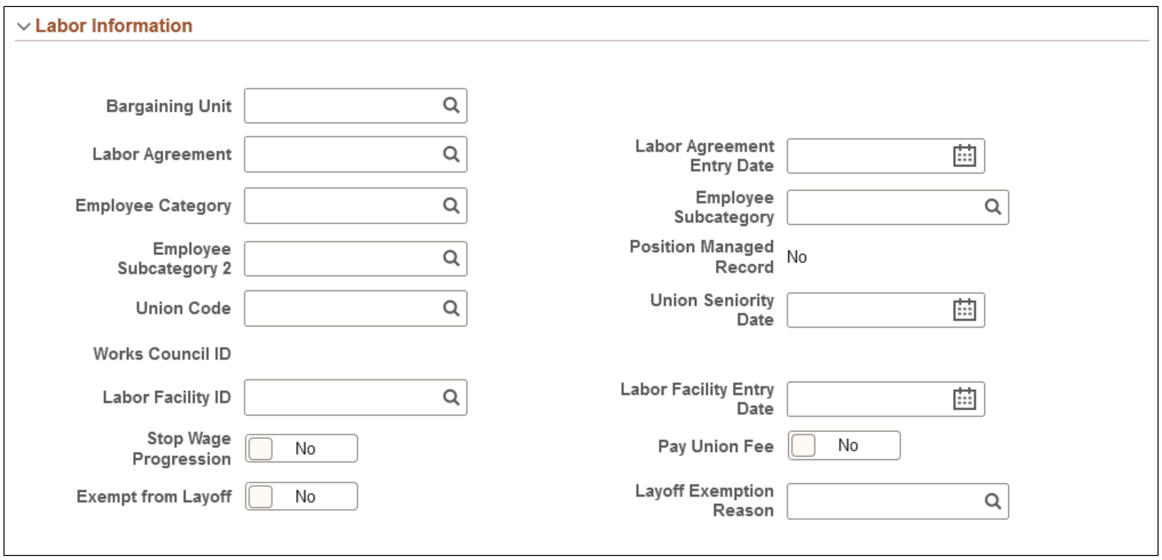
Navigation:

Navigate to the **Labor Information** section or page of Job Data in fluid.

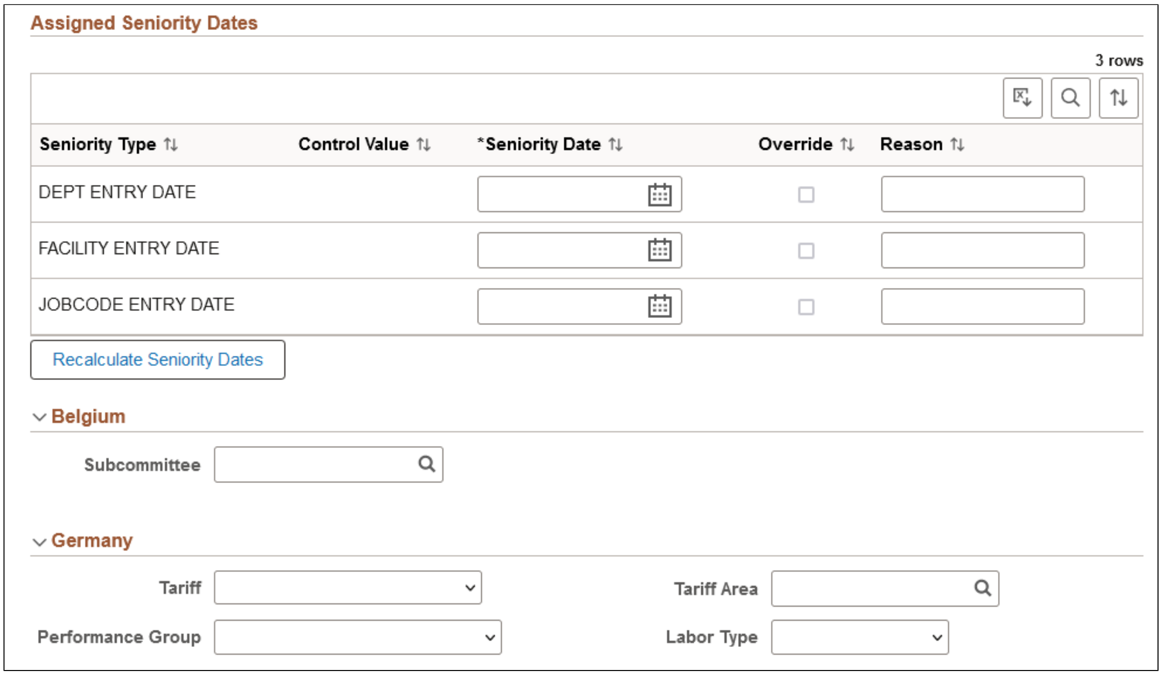
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

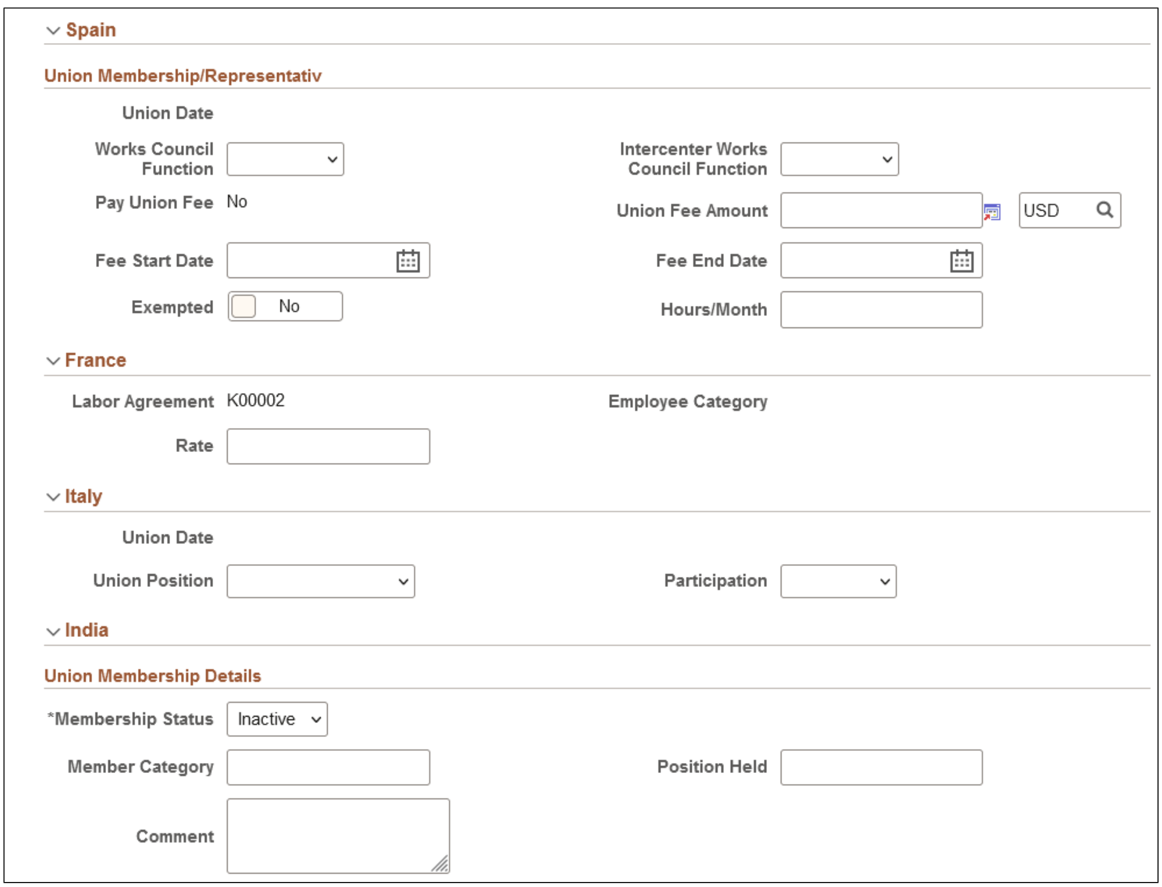
This example illustrates the fields and controls on the Job Labor (1 of 3).



This example illustrates the fields and controls on the Job Labor (2 of 3).



This example illustrates the fields and controls on the Job Labor (3 of 3).



Field or Control	*Description*
Bargaining Unit	Select a code representing the bargaining unit to which the employee belongs.
Labor Agreement	Specify which labor agreement applies to this worker.
Labor Agreement Entry Date	If this worker is part of a national labor agreement, enter the date on which the worker enters the category or subcategory. Also, use this date to track the worker's seniority within the category.
Employee Category	Specify the worker category to which the worker belongs under the labor agreement.
Employee Subcategory	Select the subcategory that applies to the worker. If the employee category that you select for this person contains subcategories, this field appears. **Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.
Employee Subcategory 2	Select the secondary subcategory that applies to this worker. If the subcategory that you select for this person contains secondary subcategories, this field appears. **Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.
Position Managed Record	The system indicates whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.
Union Code	This field defaults from the position number you associated with a person, and is unavailable for entry, unless you set the **Override Details** option to *Yes*. If the worker belongs to a union, enter the code.
Union Seniority Date	Enter the date on which the worker enters the union.
Works Council ID	Select the ID of the Works Council representing this employee.
Labor Facility ID	Select the facility this worker belongs to.

Field or Control	***Description***
Labor Facility Entry Date	Enter the date the worker began in the labor facility.
Stop Wage Progression	If the selected job code is associated with a wage progression salary plan, select *Yes* to stop wage progression for this worker. The system will not accumulate hours toward a wage progression step for this worker. To resume wage progression, insert a new Job Data row and change to *No*.
Pay Union Fee	Indicate *Yes* if a union fee should be paid. The organization can define whether the worker or the employer should pay the fee. This field doesn't affect system processing.
Exempt From Layoff and **Layoff Exemption Reason**	Select *Yes* if the worker is exempt from layoff and select a reason for the layoff exemption.

See PeopleSoft Human Resources Manage Labor Administration.

Assigned Seniority Dates

This section will display a grid that lists the seniority dates associated with the selected labor agreement.

If the seniority date is set up to default from an existing value, the system will populate them. If the dates are set up to allow overrides, set the **Override** check box and enter the appropriate date.

If the seniority date is set up for manual entry, enter the appropriate date.

Click the **Recalculate Seniority Dates** button to recalculate seniority dates as needed.

See “Defining Seniority Dates” (PeopleSoft Human Resources Manage Labor Administration).

(BEL) Belgium

Field or Control	***Description***
Subcommittee	Enter the subcommittee of the union.

(DEU) Germany

Describing a German worker's labor category and role in a company is the third step in the German Works Council business process. Before you complete these fields, you must enter codes and values into the setup tables and create an association between the works council decision groups and the personnel action.

Field or Control	***Description***
Tariff	Displays the tariff, which is a labor contract between the union and the employers' association. The default comes from the worker's location listed in the Location table. You can override this default.
Tariff Area	Displays the tariff area, which is usually associated with geographical regions in Germany. The tariff area comes from the worker's location that is listed in the Location table. You can override this default.
Performance Group	Select a performance group, such as blue collar or white collar.
Labor Type	Specify if a worker is management or nonmanagement. Depending on where this worker belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.
Spokesmen Committee ID	If you identify a worker as management in the **Labor Type** field, then the Spokesmen Committee is responsible for the worker, and this field appears. The Spokesmen Committee ID for this worker comes from the worker's location in the Location table.

(ESP) Spain

Field or Control	***Description***
Union Date	Enter the date on which the worker joins the union.
Works Council Function	If the worker is a member of the works council for the organization, select which role. Values are: *Member, President,* and *Secretary.*
Intercenter Works Council Function	Select the role that the worker has in the union group (comite intercentros). Values are: *Member 1, Member 2,* and *Member 3*.
Pay Union Fee and**Union Fee Amount**	Indicate if the worker pays a fee to the union and enter the amount of the fee.

Field or Control	*Description*
Fee Start Date and **Fee End Date** (fee end date)	Enter the first and last dates on which the union fee should be paid.
Exempted	Indicate if this worker is exempt from a certain amount of work duty to handle works council duties.
Hours/Month	Enter the number of hours each month that the worker is exempted from regular work to handle works council business.

(FRA) France

Field or Control	*Description*
Rate	Enter the minimum salary calculation rate for this category. The rate is a three-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories, as defined on the Labor Agreement Categories page for the category. A subcategory can be associated with several possible rates, but only one rate is associated with the worker.

(ITA) Italy

Use this region to enter the union membership details of workers who belong to a union.

Field or Control	*Description*
Union Date	Enter the date on which the worker joins the union.
Union Position	Select the position that the worker holds in the union, if applicable.
Participation	Indicate the worker's level of participation in the union.

(IND) India

Field or Control	*Description*
Membership Status	Select whether the worker's union membership status is active or inactive.

Field or Control	***Description***
Member Category	Enter the member category. For example, *Staff, Officer,* or *Workman Category.*
Position Held	Enter the position that the worker holds. Some of the members of the union may hold office in the union as president, vice president, treasurer, or secretary; you enter this information here.

(CAN and USA) Reviewing Union Membership in Canada and the U.S.

If you're managing a workforce in Canada or the U.S., you might want to review information about each union organization that the workers belong to and see a list of workers who are members. Use the Union Membership report (PER009) for this purpose. That report displays the worker ID, name, date hired, seniority date, department, location, job title, and shift.

Related Links

“Understanding Positions” (PeopleSoft Human Resources Manage Positions)

Job Data Page - Salary and Compensation Section

Use the Salary and Compensation section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to enter information about a person's salary plan and compensation information.

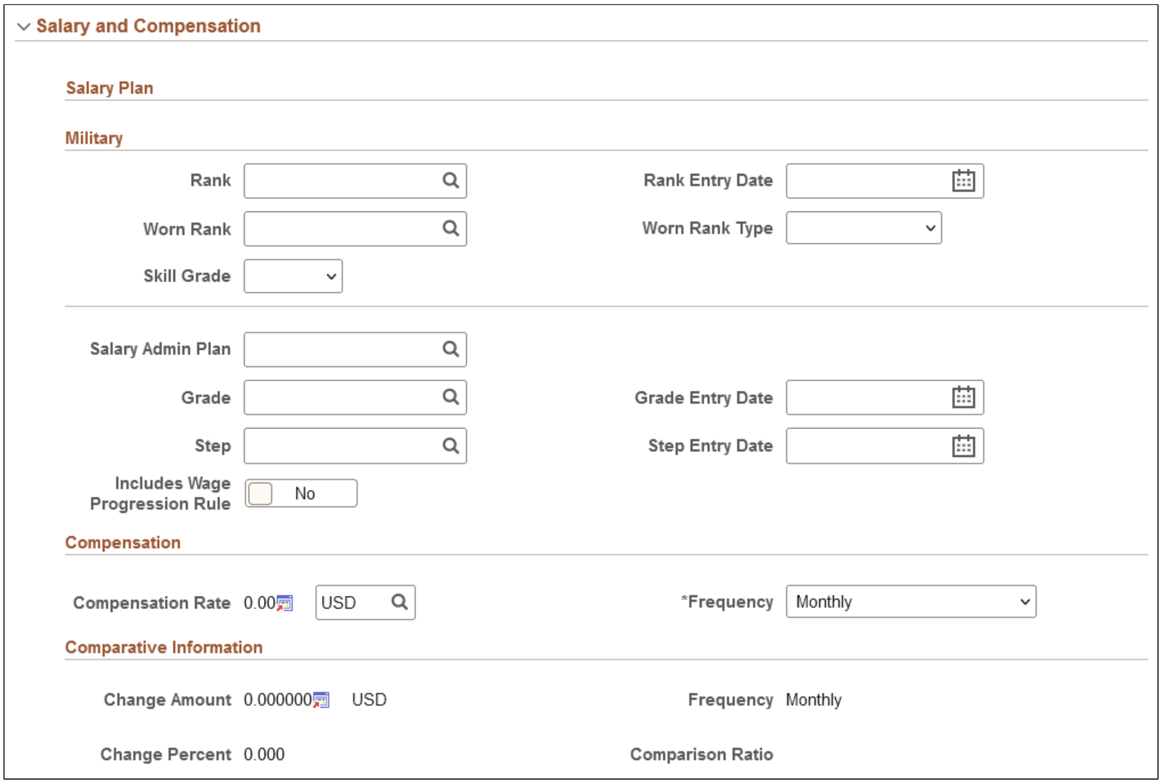
Navigation:

Navigate to the **Salary and Compensation** section or page of Job Data in fluid.

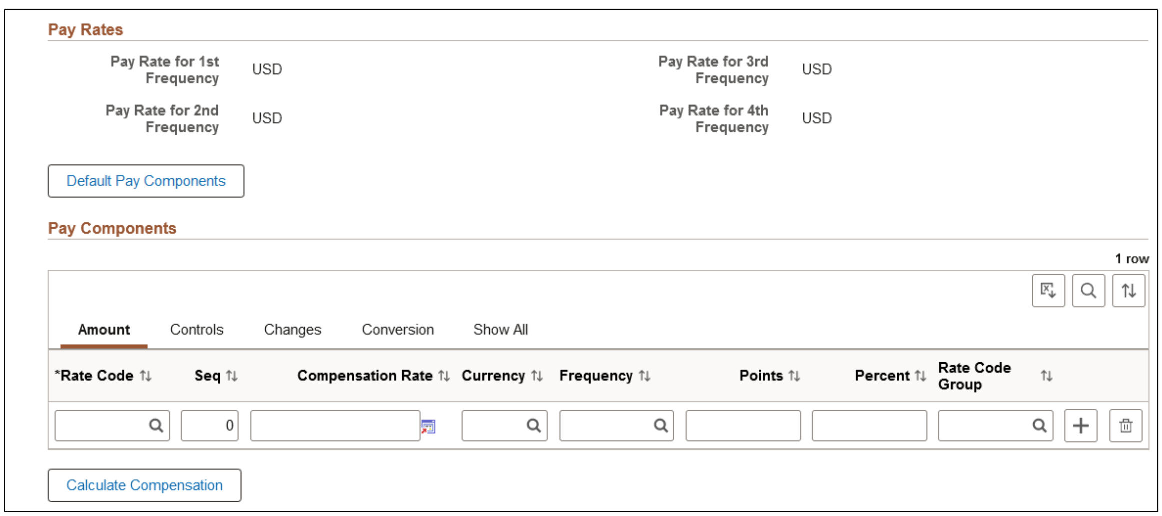
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on the Salary Plan section of Job Data page (1 of 2).



This example illustrates the fields and controls on the Salary Plan page (2 of 2). You can find definitions for the fields and controls later on this page.



Military

The section appears when military functionality is enabled on the Installation Table. Select a military service for a person on the Work Location page prior to entering a rank or worn rank.

Field or Control	***Description***
Rank	Enter the service member's earned rank. Valid ranks are defined on the Military Service - Service Ranks page.
Rank Entry Date	Enter the date the member received this rank.
Worn Rank	Enter the service member's rank insignia while serving in a particular post. The default value for this field comes from the **Rank** field but it can be overwritten. Changes to the **Rank** field value will also change the value in this field. **Note:** To have the system display the worn rank in front of the employee's name at the top of the Personal Data, Job Data, and military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the Domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the Names in Personal Data Component. See “PeopleSoft Events and Notifications Framework Overview” (Events and Notifications Framework)
Worn Rank Type	Indicate why the individual is on worn rank.
Skill Grade	Select the overall grade level for which the individual has been evaluated

Note: When military rank information is defined for a service member, the system restricts the salary plan to those plans associated with military ranks on the Military Service table. In addition to this, only the salary grades associated with the specified ranks are available. Therefore, the salary defaulting logic does not apply to military users.

Salary Plan

Field or Control	***Description***
Salary Admin Plan	Displays the salary administration plan code. This field will default from the position number you associated with a person, and is available for entry regardless if you use the **Override Details** option. If you are not using position management and you associate salary administration plans with locations or job codes, the value that is in this field comes from either the Location or Job Code table, based on setID matching. You can override the default. **Note:** If you have salary administration plans associated with more that one of these tables, the system uses the default from the last table value entered. For example, first you enter a location that is associated with salary plan KU02 where this salary plan defaults to this page. Then, you enter a job code that is associated with salary plan KU03, and the system will update the salary plan to KU03. If you change the location (and a salary plan is defined in the Location table), then the system does not automatically display a default value for this salary plan. Instead, the system checks if the existing grade and step are still valid for this new salary plan. The existing grade and step must also be defined for the new salary plan. If the grade and step are defined for this new salary plan, then the system displays by default from the Location table the value for the new salary plan. If the grade and step are not defined for this new salary plan, then the system does not change to the salary plan from the Location table. To use auto-calculated premium processing for this person, select a plan that has Auto Calculated Premium selected and an absorbing or nonabsorbing (or both) premium rate code assigned in the Salary Plan table. The system displays auto-calculated-premium-related fields on the Compensation page only if you select an auto-calculated premium plan here. **Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.

Field or Control	*Description*
Grade	If you associate a grade with the person's position or job code, the system displays the default value from the appropriate table. **Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.
Grade Entry Date	Displays the date on which the person first joined this grade. You can override this value. If you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2020, the field will update to reflect this rehire date.
Step	If you associate a step with the person's position or job code, the system displays the default value from the appropriate table.
Step Entry Date	Displays the date on which the person first joined this step, or if you are entering a transaction that returns a person to active status from an inactive status, the system will populate the field with the effective date of that transaction. For example, if you are rehiring a person as of September 1, 2014, the field will update to reflect this rehire date. You can override this value. **Note:** The system verifies the combinations of salary administration plans and grades that you select.
Includes Wage Progression Rule	Indicates if the salary plan includes wage progression.

Compensation

Field or Control	*Description*
Compensation Rate	Displays the compensation rate for the person, which is the sum of all base pay salary components.

Field or Control	*Description*
Frequency	Select a compensation frequency. Select *Contract* for contract persons. The system uses the information that you set up on the Contract Pay page to manage the person's compensation. **Note:** The Retro Pay functionality in PeopleSoft Payroll for North America and PeopleSoft Global Payroll is triggered by any frequency or compensation rate change with an effective date that is earlier than or equal to the latest pay end date of a check that is already paid to the person. Also for Retro Pay, the Frequency here cannot be hourly. It must be weekly, bi-weekly, semi-monthly or monthly, or a frequency that reflects a pay period amount.

Auto Calculated Premium

This information is available for salary plans that have Auto Calculated Premium and an absorbing or nonabsorbing (or both) premium rate code assigned in the Salary Plan table.

Field or Control	*Description*
Target Comprate (target compensation rate)	Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Auto calculating premium may be: *Absorbing.* Premium decreases when the compensation rate increases over time in order to maintain the target compensation rate. *Non-Absorbing.* Premium does not change even when the compensation rate increases over time. The system calculates the difference between this amount and the original job compensation rate and enters the difference in the premium components (the absorbing or nonabsorbing or both premium rate codes of the salary plan) of the person's compensation package. The system then recalculates the compensation rate with the premium component compensation rate. If both an absorbing rate code and a nonabsorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target compensation rate and the originally calculated job compensation rate. You can then enter some portion of the total calculated premium in the nonabsorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target compensation rate remains the same) or delete the nonabsorbing rate code. The system recalculates the job compensation rate, including the premium component compensation rate. You cannot enter a target compensation rate that is less than the original job compensation rate without the premium components. This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.
Don't Absorb Changes	Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount. This option only applies to persons who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

Comparative Information

Field or Control	*Description*
Change Amount	Displays the change in the amount of compensation for the rate code.
Change Percent	Displays the percent of change in the compensation for the rate code.
Compa-Ratio (comparison ratio)	Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.
Job Ratio	Displays the percent-through-range calculation, based on the midpoint salary of the person's job code. The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This section contains pay rates that are calculated by using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See “Default Frequencies by Country Page” (Application Fundamentals).

Field or Control	*Description*
Default Pay Components button	Click to: • Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields. • Replace manual updates and old default values with the current default values. • Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on. • Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record. If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click **OK,** the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).
(E&G) Contract Change Prorate Option link	Click to access the Choose Proration for Contract page (JOB_CNT_CHG_SCF), where you choose how to handle contract pay when there is a change to the contract amount. Use this link only when the payment frequency is *C* (contract). The link is active only when the row is available for data entry. The system displays the selected proration option to the left of the link so that you can review the settings even when the link is inactive. See "Contract Change Prorate Options Page" (PeopleSoft Payroll for North America).
Calculate Compensation button	Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components

Field or Control	***Description***
Calculate Compensation button	Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components: Amounts Tab

Select the Amounts tab.

Field or Control	***Description***
Rate Code	Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information that is associated with this rate code in the pay components grid. **Note:** If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.
Compensation Rate	Displays the compensation rate for the pay component.
Frequency	Displays the compensation frequency for the pay component. **Note:** The Rate Code and Frequency for salaried employees must either be the pay period or Annual. It should not be Hourly. Using an hourly rate code and frequency for salaried employees can adversely impact Retro Pay and FLSA calculations.
Points	Displays the salary points that are associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the **Salary Points** check box on the Installation Table page.
Percent	If the rate type for this rate code is percent, the system displays the percent that is to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Field or Control	Description
Rate Code Group	Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of a person compensation package.

Pay Components: Controls Tab

Select the Controls tab.

Field or Control	Description
Source	Indicates how the pay component gets into the pay components grid. *Manual* indicates that the pay component is added manually. *Salary Step* indicates that the pay component is retrieved by default from the salary step. *Job Code* indicates that the pay component is retrieved by default from the job code, and so on.
Manually Updated	This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.
Default Without Override	Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

Pay Components: Changes Tab

Select the Changes tab.

Field or Control	Description
Change Amount	Displays the overall change amount in this pay component rate.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components: Conversion Tab

Select the Conversion tab.

Field or Control	***Description***
Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.
Apply FTE (apply full-time equivalent)	Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

Related Links

“Understanding PeopleSoft HCM System Data Regulation” (Application Fundamentals)
“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)
“Understanding Contract Earnings” (PeopleSoft Payroll for North America)
PeopleSoft Human Resources Administer Compensation
“Job Data Pay Rate Frequencies” (Application Fundamentals)

Job Data Page - Payroll Section

Use the Payroll section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Salary and Compensation section or page.

Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

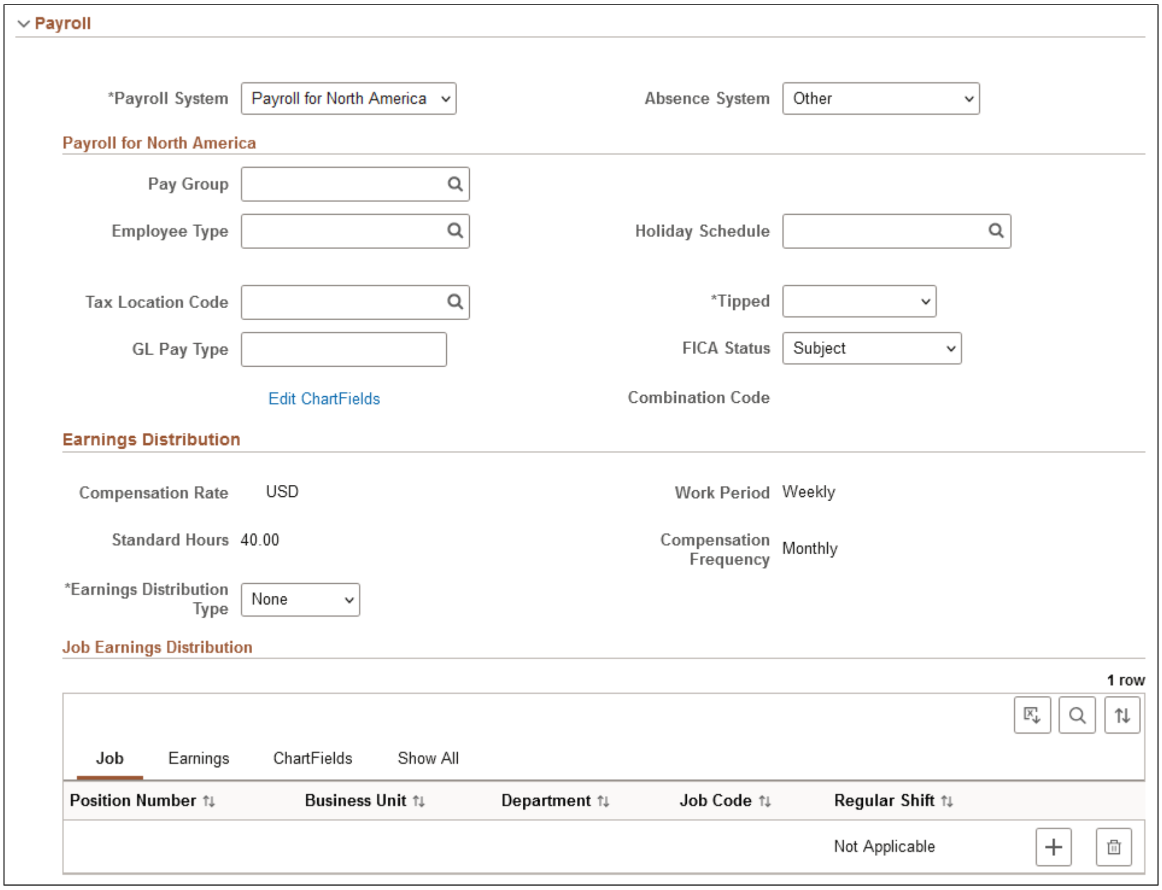
Navigation:

Navigate to the **Payroll** section or page of Job Data in fluid.

Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on Payroll.



Field or Control	***Description***
Payroll System	Select the payroll system that is used to process this person's paycheck. The **Payroll System** field is available for entry only if the **Action** that was entered on the Work Location page is *Change of Pay System* or a hire-related action such as *Rehire* or *Additional Job.* **Note:** PeopleSoft Payroll for North America does not process payroll for contingent workers. Customers using the E&G contract pay functionality need to add contract workers using the Add Employment Instance component or the Organizational Relationships page.
Absence System	Select the absence system that is used to process this person's absences.

Payroll for North America

If you use PeopleSoft Payroll for North America or PeopleSoft Payroll Interface to process this person's paycheck, complete these fields:

Field or Control	*Description*
Pay Group	Select a pay group. Available values are the valid pay groups for the country selected on the Company table (not the regulatory region selected in the worker's job data).
Employee Type	Displays the employee type; the value depends on the pay group. The system completes the field with the default value from the Pay Group table. If an employee type doesn't exist for this pay group, establish one in the Pay Group table.
Holiday Schedule	If you defined a default holiday schedule for the employee's location, the system displays it here. If you left the holiday schedule blank on the Location Profile page and entered a default on the Pay Group table, the system displays it here.
Tax Location Code	Select a tax location code. Available values are the valid tax locations for the country selected on the Company table (not the regulatory region selected in the worker's job data). ***Warning!*** Do not change a person's tax location code more than once for the same effective date (using effective sequence). The system creates tax records according to the first tax location change only. Tax records for the second tax location change on the same date are not created; instead, the system issues an error message.
Tipped	Indicate whether this worker receives tips. This field is available only if you define tips processing in the Company table. Values are: *Directly:* Select for workers who normally receive tips directly from customers (for example, food servers). *Indirectly:* Select for workers who do not normally receive tips directly from customers, but who might receive tips occasionally (for example, cooks and kitchen helpers). *Not Tipped:* Select for workers who are not tipped.
GL Pay Type (general ledger pay type)	Organizations can use this field for customized general ledger interfaces. Payroll for North America does not use this field.
FICA Status	Indicate whether the person status is *exempt, subject,* or *Medicare only.*

Field or Control	*Description*
Edit ChartFields	Click this link to access the ChartField Detail page (HMCF_CHRTFLDDTL_FL) to enter a combination code and select ChartField details.
Combination Code	(Optional) Select the appropriate labor distribution to which to post the hours and earnings for this person. Enter the general ledger combination code in the employee's job data only on an exception basis. If you do not want the employee's earnings charged to the default combination code that is mapped to the earnings code and department, you can enter a different combination code here. For example, you might want to temporarily charge the employee's earnings to a different department. Use Correct History mode to enter or remove the temporary combination code. You can delete this combination code, if needed.

Earnings Distribution

Use the Job Earnings Distribution section to distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types.

If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Review these guidelines prior to entering data in the Job Earnings Distribution section:

- Skip this section if you don't need to distribute standard earnings for the person.

  Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.

- The system hides this section when all job rows in the component use PeopleSoft Global Payroll.

  However, if the selected job row has a payroll system other than Global Payroll (for example, PeopleSoft Payroll for North America or Payroll Interface), then the system displays the section.

- Don't use this section to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Payroll for North America for handling special earnings.

- If you enter a parameter such as department in this section, the parameter overrides the same field on the job record.

  If you leave a parameter blank, the system uses the field from the job record.

Field or Control	***Description***
Standard Hours and **Work Period**	If you are using position management and click the **Override Details** option to *Yes*, these fields become available. If you change these values on this page, it will also update the same fields on the Job Information page.

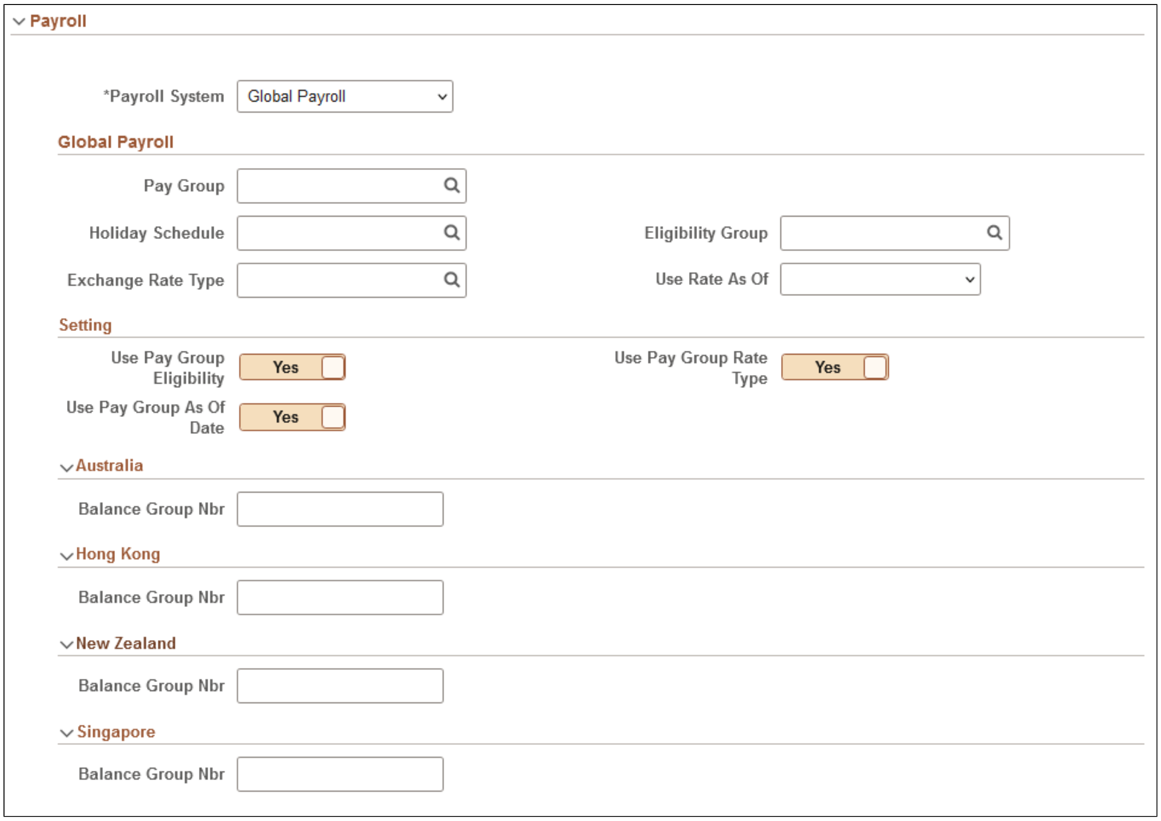
Field or Control	***Description***
Earnings Distribution Type	Select an earnings distribution type. Values are: • *None:* Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, the Job Earnings Distribution section grid fields will not be available for entry. **Note:** You must select *None* if you want the system to use the proration rule that you select on the Pay Group Table - Paysheets page when prorating partial pay. See "Understanding Pay Groups" (Application Fundamentals). • *By Amount:* Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount. Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the **Compensation Rate** field on the Salary and Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record. For example, to charge 3,000 of a worker's regular earnings to the worker's regular department (on the job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines: • On the first line, leave **Department** blank (so that the system uses the worker's regular department from the job record) and enter *3000* in the **Amount** field. • On the second line, enter *105* in the **Department** field and *544* in the **Amount** field. • On the third line, enter *10503* in the **Department** field and *1000* in the **Amount** field. The amounts that are in the distribution lines total 4,544, so the system checks that amount in the **Compensation Rate** field on the worker's job record equals this total. • *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the

Field or Control	*Description*
	Standard Hours field on the Job Information page. The **Standard Hours** field that appears at the top of this page also changes. Enables you to apportion the worker's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the **Standard Hours** field on the worker's job record. For example, if a worker works a 40-hour week, and you want to charge 30 hours of regular pay to the worker's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines: • On the first line, leave **Department** blank (so that the system uses the worker's regular department (from the job record) and enter *30* in the **Standard Hours** field. • On the second line, enter *103* in the **Department** field and *10* in the **Standard Hours** field. The hours that are in the distribution lines total 40, so the system inserts *40* in the **Standard Hours** field on the worker's job record. • *By Percent:* Available to all workers. The sum of the percentages that are in the distribution lines must equal 100. Enables you to apportion the worker's total earnings for a period on a percentage basis. For example, to charge 80 percent of regular earnings to the worker's regular department (on the worker's job record) and 20 percent to department 100, set up two distribution lines: • On the first line, leave **Department** blank (so that the system uses the worker's department from the job record) and enter *80* in the **Percent** field. • On the second line, enter *100* in the **Department** field and *20* in the **Percent** field.
Job Earnings Distribution grid and **Add** button	Click the Add button to display the Job Earning Distribution grid, where you can enter the distribution information.

Global Payroll

You will see this information if you use PeopleSoft Global Payroll to process a person's paycheck.

This example illustrates the fields and controls on the Payroll section or page for Global Payroll.



Field or Control	***Description***
Pay Group	Select a pay group. The payroll system that you select on the Installation Table - Products page determines what value appears here. If *Global Payroll* is selected, the Global Payroll pay groups appear. **Note:** The Global Payroll **Pay Group** field is different from **the Payroll for North America Pay Group** field. Pay group is very important in Global Payroll. Selecting *Global Payroll* as your payroll system on the Installation Table - Products page and selecting a pay group is what helps select a payee into the payroll process.
Holiday Schedule	Enter a holiday schedule. If you leave this field blank, Global Payroll processing uses the holiday schedule assigned to the payee's pay group, but does not enter that holiday schedule here.

Field or Control	***Description***
Eligibility Group	This field is blank if **Use Pay Group Eligibility** is set to *Yes*. If you want to override the pay group default, set to *No* and select an eligibility group which specifies earnings, deduction, and absence elements that a payee might be eligible to receive.
Exchange Rate Type	This field is blank if **Use Pay Group Rate Type** is set to *Yes*. If you want to override the pay group default, set to *No* and select the currency exchange rate type to use when performing currency conversions for the payee.
Use Rate As Of	This field is blank if **Pay Group As Of Date** is set to *Yes*. If you want to override the pay group default, set to *No* and select the pay calendar date to use when retrieving the effective-dated exchange rate information during currency conversions. The **Use Rate As Of** field works with the **Exchange Rate Type** field to determine which effective date is retrieved to get the appropriate exchange rate for the calendar period being processed. Exchange rate effective dates include: *Period Begin Date, Period End Date,* and *Payment Date.*
Use Pay Group Eligibility, **Use Pay Group Rate Type**, and **Use Pay Group As Of Date**	When you select a pay group, these fields are automatically set to **Yes**. Leave them set to *Yes* to use the default values from the pay group definition. Swipe to *No* to override the default values. **Note:** PeopleSoft Global Payroll stores the values at the Job level *only* if you override them here. If you add a new effective-dated row to the job record or change the pay group assignment, the system reverts to the pay group defaults.

(AUS) Australia

Field or Control	*Description*
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(HKG) Hong Kong

Field or Control	*Description*
Balance Group Nbr (balance group number)	Enter a balance group number. When workers are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separately. PeopleSoft Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of a worker in a tax year are stored separately in terms of payroll data. This enables a worker to have multiple tax balances if the worker is terminated and rehired in the same financial year. When a worker is rehired in the same tax year, the balance amount is stored in the system variable CM VR BAL GRP ID, which is attached to each year-to-date (YTD) accumulator. Every time you run the payroll process, the balance that is stored in the system variable CM VR BAL GRP ID is retrieved by the accumulator to resolve the earnings that are generated for each new position. Balance group numbers are used to maintain earnings balances and are used as User Key 2 for all Hong Kong YTD accumulators.

(NZL) New Zealand

Field or Control	***Description***
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(SGP) Singapore

Field or Control	***Description***
Balance Group Nbr (balance group number)	Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

Note: Before entering information for U.S. foreign nationals, use the Substantial Presence Test. Select **Workforce Administration** > **Personal Information** > **Citizenship** > **Employee Presence Test USA** > **Employee Presence Test USA.**

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note: This feature works only for hourly workers, not for salaried workers.

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Payroll Page, Job Earnings Distribution section, select the **By Percent** option, enter the appropriate disability earnings code, and enter a percent of *100.*

Note: When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

Related Links

(USA) Determining U.S. Residency Status for Foreign Nationals
"Administer Compensation Overview" (PeopleSoft Human Resources Administer Compensation)
"Setting Up Holiday Schedules" (Application Fundamentals)
PeopleSoft Payroll for North America
"Understanding Earnings Tables" (PeopleSoft Payroll for North America)

Job Data Page - Employment Data Section

Use the Employment Data section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to enter optional data, such as a worker's business title.

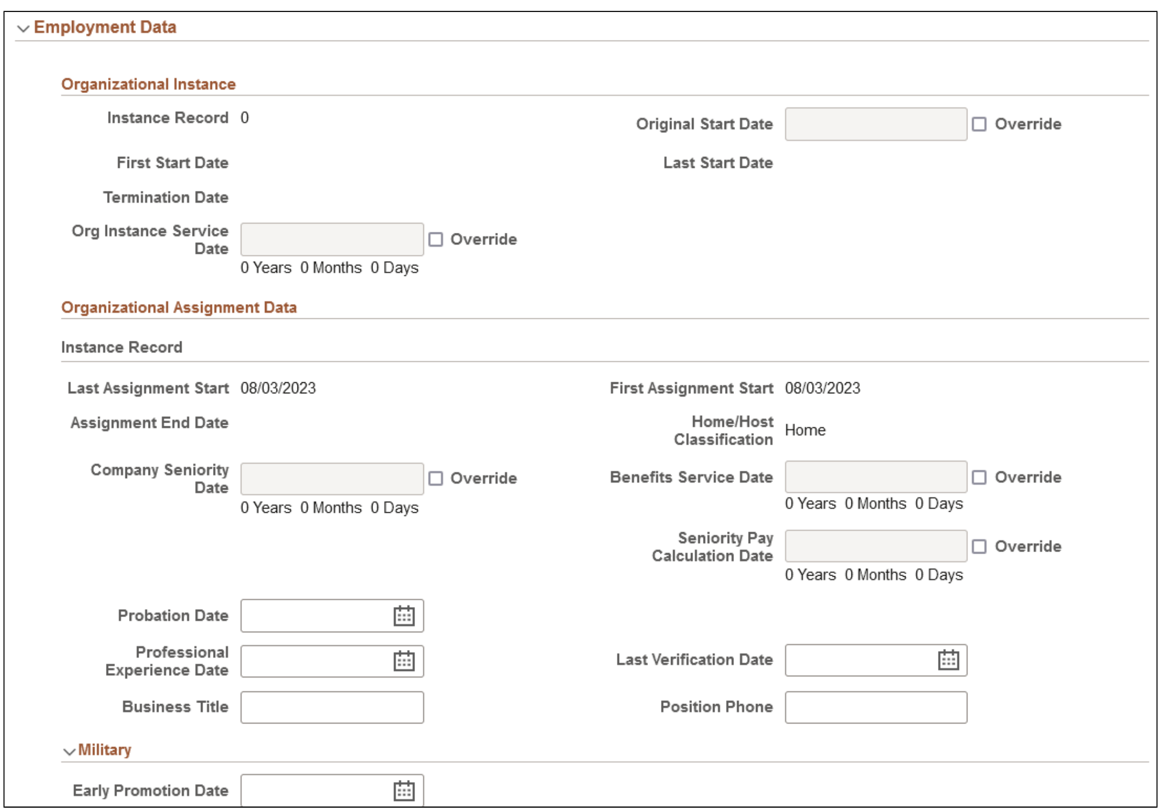
Navigation:

Navigate to the **Employment Data** section or page of Job Data in fluid.

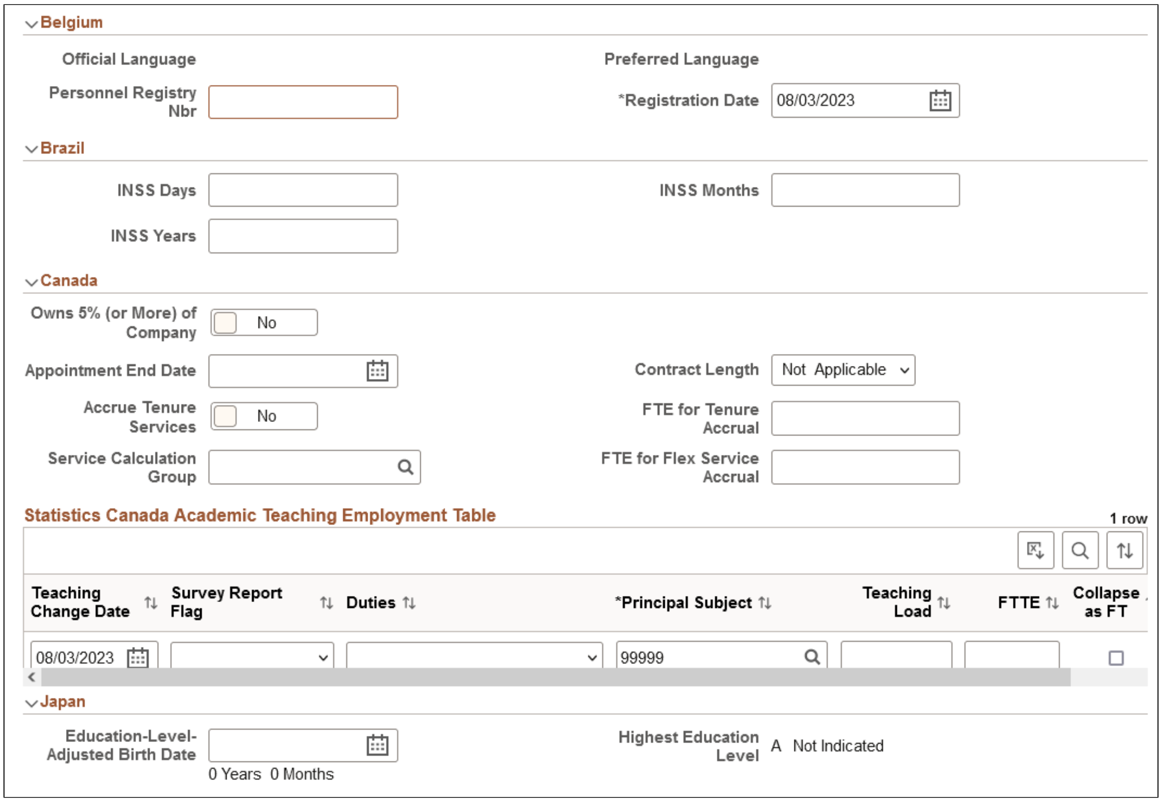
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

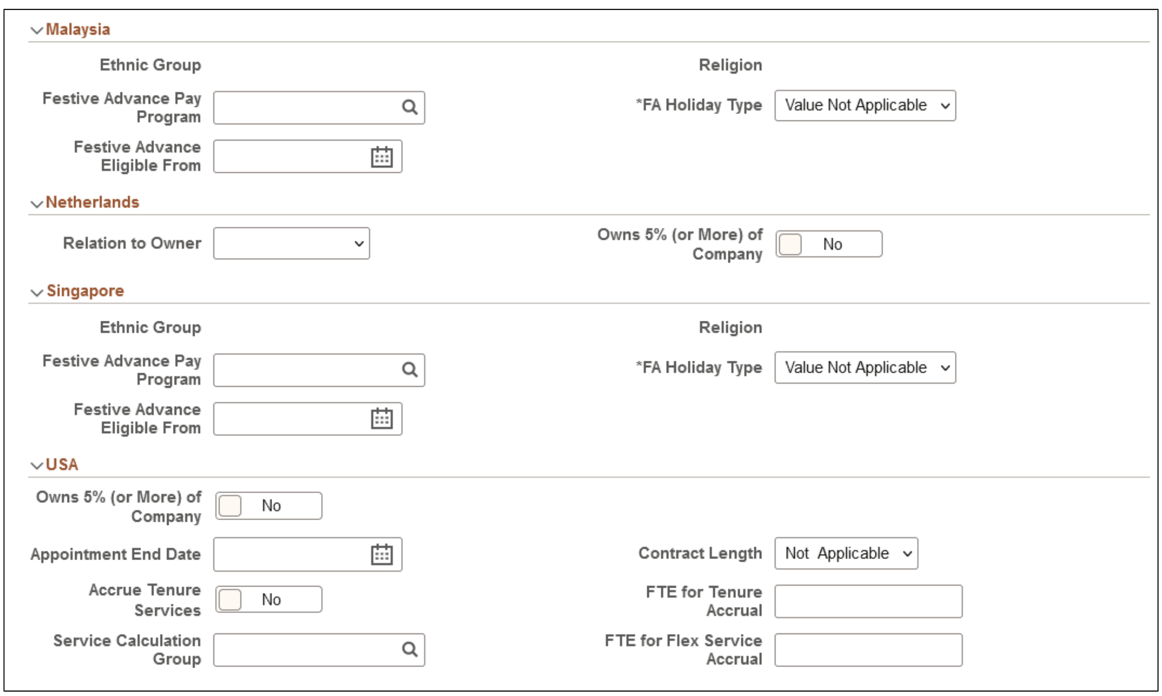
This example illustrates the fields and controls on the Employment Information section or page (1 of 3).



This example illustrates the fields and controls on the Employment Information section or page (2 of 3).



This example illustrates the fields and controls on the Employment Information section or page (3 of 3).



Note: The dates on this page are used in reports and to enable you to track a person's work history.

Organizational Instance

Field or Control	***Description***
Instance Record	The number of the instance associated with this job data record. The organizational instance record number is the same as the ERN of the controlling instance. You can only modify the organizational instance dates when you review this page for the controlling instance. **Note:** When you review this page for a non-controlling instance, the system makes the rest of the fields in this group box display only because non-controlling instances inherit the instance dates from the controlling instance.
Original Start Date	Displays the earliest date that this job data record (emplID/ERN instance) was associated with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* This is not the date the job was created in the system, like the **Date Created** field on the Work Location page. You can override this date to enter an earlier start date, for example if the person has previously worked for the company or an affiliate or, depending upon company policies, for special cases like jobs with probationary periods, mergers and acquisitions, and so on. See Understanding Job Data.
First Start Date	Displays the first start date for this organization instance. The system populates this field with the effective date of the first job data row with the action of *HIR* (for employees) or *ADD* (for contingent workers) from the controlling instance. The system uses this date as the hire date in reports. **Note:** The system does not refresh this date again unless you enter a new row in the controlling instance with one of these actions. You would normally not do this unless you needed to reset the hire date.

Field or Control	***Description***
Last Start Date	Displays the most recent start date for this organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of *HIR* and then refreshes it with the effective date of job data rows with the actions *REH* (for employees) or *RNW* (for contingent workers). This date is different from the first start date if this organization instance has been inactive and then reactivated.
Termination Date	Displays the day before the effective date of the controlling instance's job data row with the action of *TER* or *COM,* if applicable. If you rehire or renew a person's controlling instance, the system deselects this field.
Org Instance Service Date (organizational instance service date) and **Override**	Displays the effective date on which the service of a person commenced with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* Select the **Override** check box to override this date to enter an earlier service date, for example if the person has previously worked for the company or an affiliate. See Understanding Job Data.
Provider ID	For contingent workers, displays the ID of the service provider.

Organizational Assignment Data

Assignments are the job data records tracked under an organizational instance, each identified by a unique emplID/ERN combination. Track the start and completion dates of individual assignments at the assignment level.

Field or Control	***Description***
Last Assignment Start Date	Displays the most recent start date for this assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.

Field or Control	***Description***
First Assignment Start	Displays the first start date for this assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment (such as *HIR* or *ADD).*
Assignment End Date	Displays the effective date of the job data row with the action of *TER* or *COM,* if applicable.
Home/Host Classification	For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location.
Time Reporter Data	Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Time and Labor, this link is unavailable.
Company Seniority Date or **Engagement Date** and **Override**	This field normally displays as the **Company Seniority Date** field. However, when military functionality is enabled on the Installation Table and this person is a person associated with a rank, this field displays as the **Engagement Date** field. Based on the date that you enter here, the system calculates the number of years, months, and days of seniority or engagement for a person. Select the Override check box to change the date.
Benefits Service Date and **Override**	Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility. Select the Override check box to change the date.
Seniority Pay Calculation Date and **Override**	Enter the date that the system should use to calculate seniority-based pay. Select the Override check box to change the date.
Probation Date	Enter the date on which the worker is placed on probation.
Professional Experience Date	Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.
Last Verification Date	Displays the latest date on which the worker verified his or her personal data in the system.

Field or Control	*Description*
Business Title	Enter the worker's official title, which might be different from the job title. If the employee is in a position, the system displays the current title from the worker's position. When this field gets its value from the position, and position data is not overridden, you should run the Refresh Person Org Assignments (HR_PERORGASN) process to update the Employment Data record with future dated rows that have become current. For more information on this process, see the "Refresh Person Org Assignments Page" (PeopleSoft Human Resources Manage Positions).
Position Phone	Track the worker's primary work phone number. You can also update this field by using the Add/Update Position Info pages. If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page. When this field gets its value from the position, and position data is not overridden, you should run the Refresh Person Org Assignments (HR_PERORGASN) process to update the Employment Data record with future dated rows that have become current. For more information on this process, see the "Refresh Person Org Assignments Page" (PeopleSoft Human Resources Manage Positions).

Note: When you enter a new row with an action of *HIR, ADD, POI, ADL,* or *ASG* and save the component, the system sets the **Company Seniority Date, Benefits Service Date,** and **Seniority Pay Calc Date** (seniority pay calculation date) fields on this page to the effective date that you enter on the Work Location page as long as the **Override** date check box is not selected. You can override these fields after saving the component. The system calculates and displays the worker's service months and days based on the information that you enter in the **Company Seniority Date, Service Date,** and **Seniority Pay Calc Date** fields.

Military

The system displays the military section when military functionality is enabled on the Installation Table.

Field or Control	*Description*
Early Promotion Date	Enter the earliest date this service member may be considered for the next promotion.

(BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

Field or Control	*Description*
Personnel Registry Nbr (personnel registry number)	Enter the number under which the worker is registered in the personnel register.

(BRA) Brazil

Field or Control	*Description*
INSS Days, INSS Months, and **INSS Years** (Instituto Nacional de Securidade Social days, months, and years)	Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company.

(CAN) Canada

Field or Control	*Description*
Owns 5% (or More) of Company	Set to **Yes** if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing in the Manage Base Benefits business process of PeopleSoft Human Resources.
Accrue Tenure Services	Set to *Yes* to activate the tenure accrual.
FTE for Tenure Accrual	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker's accrued service.

(CAN) (E&G) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys business process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. Review the information in this table to ensure that it is up-to-date every time that you change a worker's record.

Field or Control	*Description*
Teaching Change Date	The system adds a new teaching change date row only if you choose to add one. Insert a new row for each teaching appointment if the institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported.
Survey Report Flag	Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A,* this record isn't reported in academic teaching surveys. You can override this default value.
Duties	Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default.
Principal Subject	Select the principal subject that is taught by the worker.
Teaching Load	Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0.* If the worker is teaching one full course and one-third of another, enter *1.33.*
FTTE (full-time teaching equivalency)	Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter *.75.*

Field or Control	*Description*
Collapse as FT (collapse as full-time)	Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job. Use this field only if the worker: • Has two or more part-time jobs in different departments that function as a single full-time job. • Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary. Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

(JPN) Japan

Field or Control	*Description*
Education-Level-Adjusted Birth Date	Select the worker's education-level-adjusted birth date. The day and the month are the organization's standard calculation birth date (SCB—usually April 1); the year comes from the worker's education-level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give a worker credit for special work experience).
Years Months	Displays the worker's highest education level as specified in the Personal Data component. This education level is the starting point for education-level age-related calculations.

(MYS and SGP) Malaysia and Singapore

After you set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible workers that are in the workforce are granted festive advances. Assigning the festive advance type to the worker occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the worker's festive advance details should be different, change them on this page.

Field or Control	***Description***
Ethnic Group and **Religion**	Displays the values that you enter on the Personal Data - Regional page.
Festive Advance Pay Program	Displays the value from the Job Code Table - Job Code Profile page. You can change this default.
FA Holiday Type (festive advance holiday type)	Select a festive advance type. Values are: *Chinese New Year, Christmas, Deepavali, Hari Raya,* and *N/A*. The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select *N/A*.
Festive Advance Eligible From	Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored. When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page. When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance. **Note:** This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the worker has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

(NLD) Netherlands

Field or Control	***Description***
Relation to Owner	Select the worker's relationship to the owner, as appropriate.

Field or Control	Description
Owns 5% (or More) of Company	Set to **Yes** if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing in the Manage Base Benefits business process of PeopleSoft Human Resources.

(USA) United States of America

Field or Control	Description
Owns 5% (or More) of Company	Set to **Yes** if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing in the Manage Base Benefits business process of PeopleSoft Human Resources.
Accrue Tenure Services	Swipe to *Yes* to activate the tenure accrual.
FTE for Tenure Accrual	Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.
Service Calculation Group	Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.
FTE for Flex Service Accrual	Enter the FTE value to be used in prorating the worker's accrued service.

Related Links

“Assignment Data Page” (PeopleSoft Human Resources Track Global Assignments)
“Education Level Page” (Application Fundamentals)
“Understanding the Festive Advance Process” (PeopleSoft Human Resources Administer Festive Advance)
“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)
“Understanding Positions” (PeopleSoft Human Resources Manage Positions)
“Understanding Time and Labor Implementation” (PeopleSoft Time and Labor)

Job Data Page - Benefit Program Section

Use the Benefit Program Participation section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.

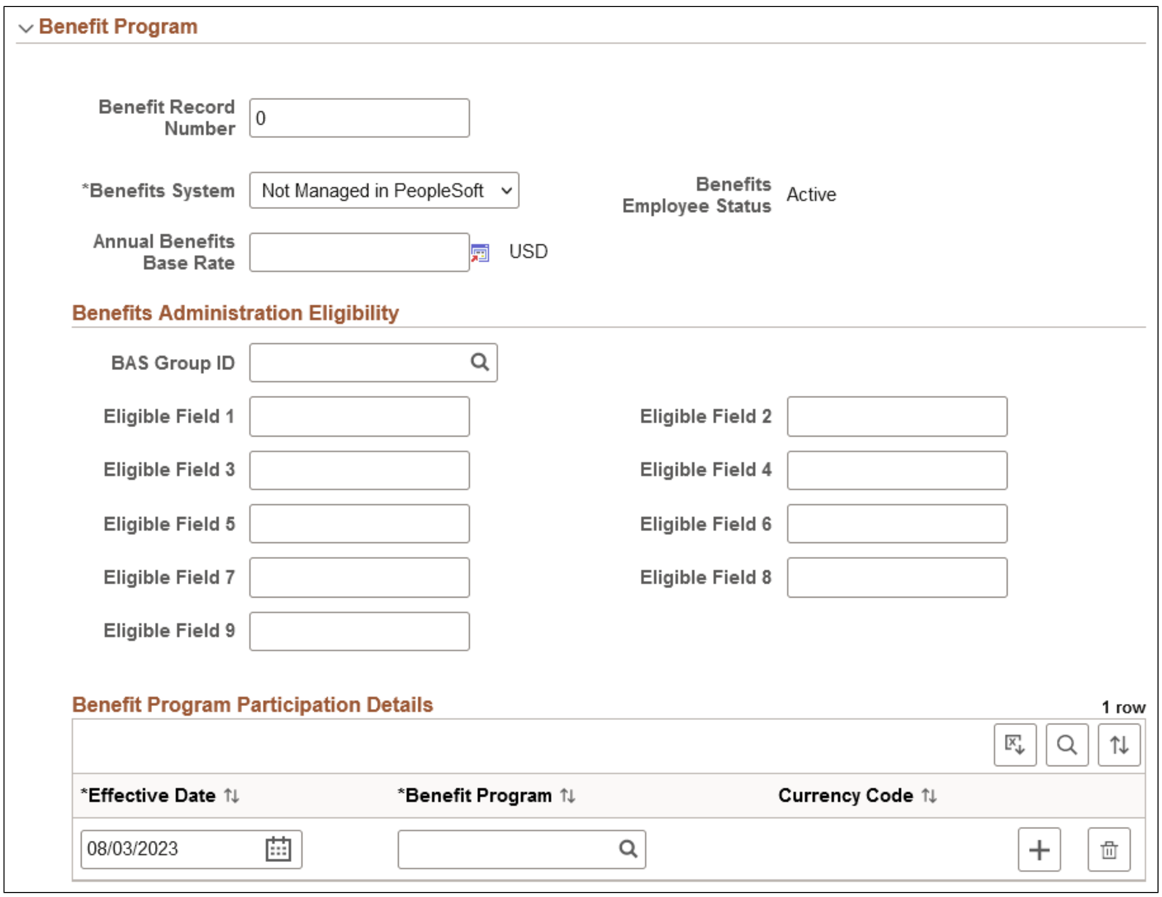
Navigation:

Navigate to the **Benefit Program** section or page of Job Data in fluid.

Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on the Benefit Program Participation section or page.



Field or Control	*Description*
Benefit Record Number	Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to *0*. You can override this value to attach this job to a different benefit record number. The system deselects the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.
Benefits System	Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

Benefits Administration Eligibility

Field or Control	*Description*
Eligible Field 1–9	Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation Details

Field or Control	*Description*
Add Benefits Program button	Select to add participation details.
Benefit Program	Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value.
Currency Code	Displays the code of the currency that is specified for the benefit program in the Benefit Program table.

Related Links

“Understanding the Core Tables for PeopleSoft Manage Base Benefits” (PeopleSoft Human Resources Manage Base Benefits)

Job Data Page - <Drop Zone> Section

Use the drop zone section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to update custom steps that use drop zones embedded in your activity guide process.

Note: The HCM system delivers four Drop Zone pages that you can configure to add information specific to your organization. See "Understanding Drop Zones" (Application Fundamentals).
If you do not want to use the delivered Drop Zone sections in the activity guide, turn it off using Page and Field Configurator ("Understanding Page and Field Configurator" (Enterprise Components)).

Navigation:

Navigate to a **<Drop Zone>** section or page of Job Data in fluid.

Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This video provides an overview of Drop Zones:

Video: PeopleSoft Drop Zones on Fluid and Classic Plus Pages

Job Data Page - Attachments Section

Use the Attachments section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to add or view attachments for a job data row.

Note: This page will be available when Attachments is enabled for the organizational relationship (employee, contingent worker, or person of interest) on the Person and Job Installation - Person and Organization Page

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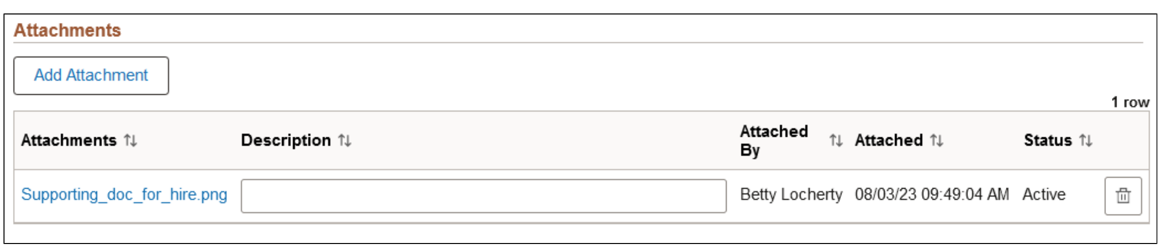
Navigation:

Navigate to the **Attachments** section or page of Job Data in fluid.

Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on Attachments.



Attachments

Use this section to manage attachments by uploading, deleting, or updating attachments using fluid. Attachments are not accessible from the classic pages.

Field or Control	*Description*
Add Attachment button	Select this button to access the File Attachment page and upload files.
Attachments and **Description**	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving the page, which you can overwrite.
(Delete) button	Select this button to remove an attachment.

The following video provides an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

Related Links

"Configuring Attachments in Fluid Framework" (Application Fundamentals)

Job Data Page - Validation Section

Use the Validation section of the Job Data page (HR_JOBDATA_ADD_FL) in fluid to view error and warning messages related to the Job Data validation process.

Note: When there are no validation errors or warnings, the process will not show this section. The activity guide process will move to the next step.

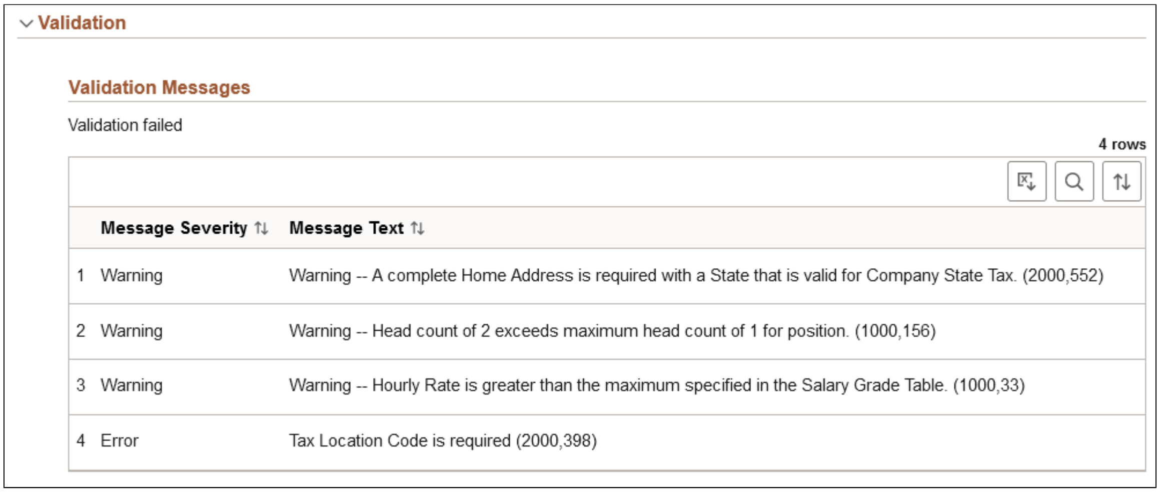
Navigation:

Navigate to the **Validation** section or page of Job Data in fluid or select the **Next** or **Validate** button to run the Validation process.

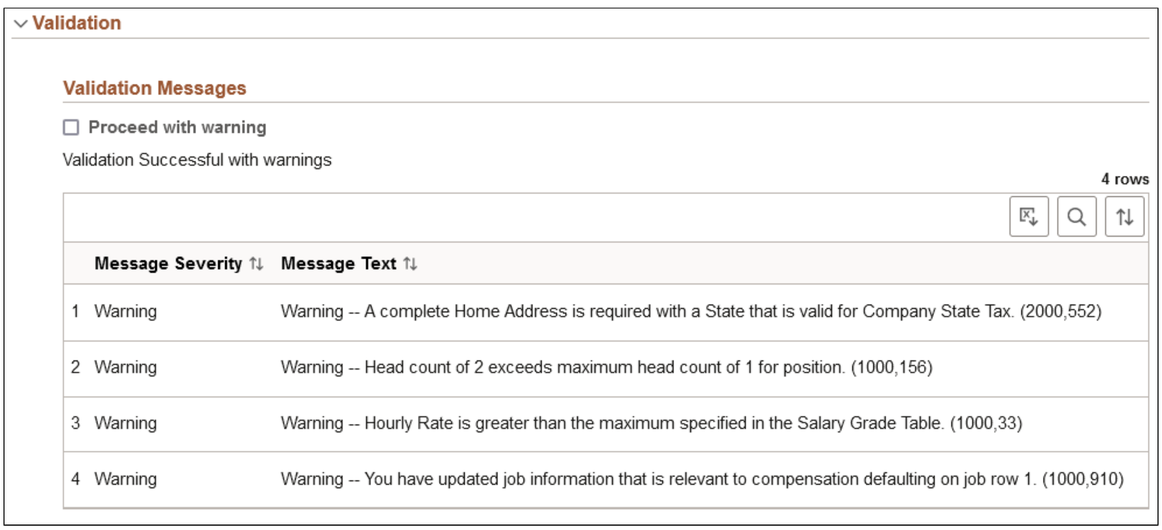
Use the Manage Human Resources Dashboard to access the Job Data pages in fluid:

- When adding a new organizational relationship or instance, access the Job Data Page by using the Create <Organizational Relationship> Tiles or (Fluid) Organizational Relationship Tile.
- When updating job data, use the Manage Job Tile to access Job Data.

This example illustrates the fields and controls on the Validation when there are error messages.



This example illustrates the fields and controls on the Validation when there are only warning messages.



Note: When creating an organizational instance, you must resolve all errors, but can choose to proceed with warnings in place. It is recommended that you perform the validation and resolve message to ensure cleaner data entry.
When updating or adding a new job row using the Manage Job Tile, this step is not required before moving to the Summary step in the guided process.

For a list of field descriptions, see the Person Data Page - Validation Section documentation.

Create <Organizational Relationship> - Summary Page

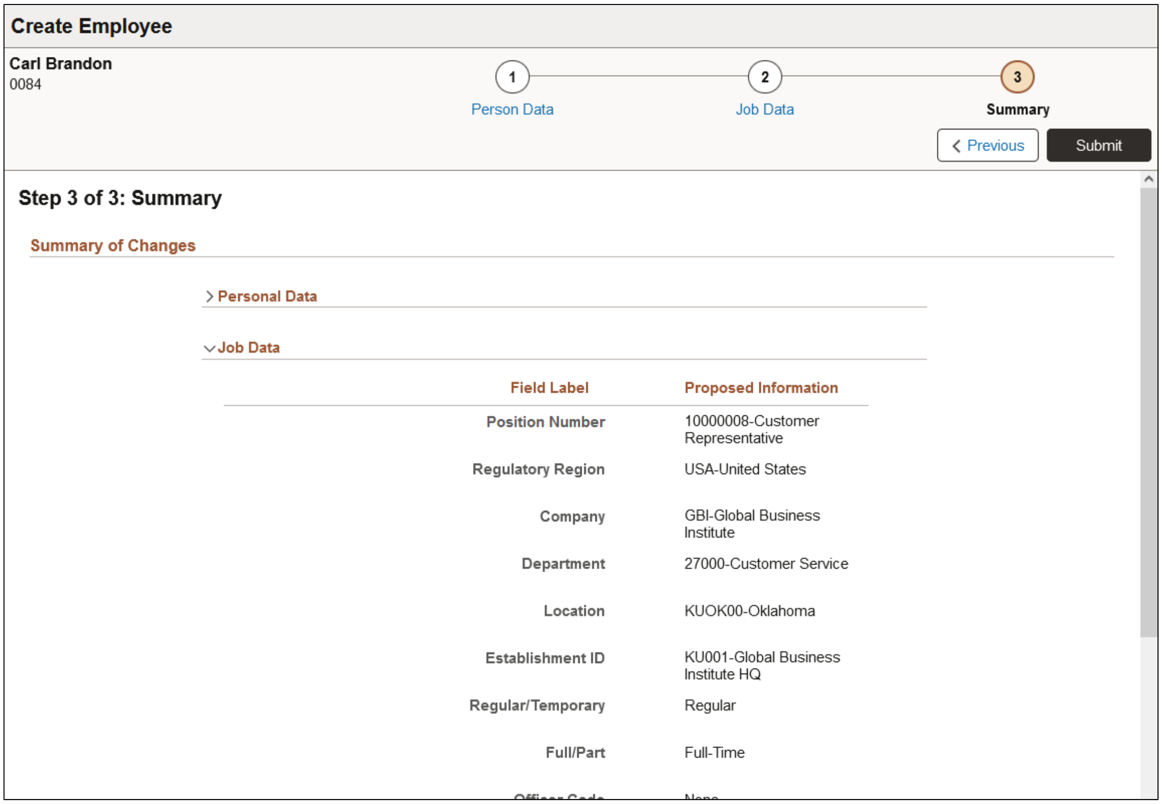
Use the Create <Organizational Relationship> - Summary page in fluid (JOB_DATA_RVW_FL) to view the proposed information you are adding for a Person Data and Job Data record prior to submitting the transaction.

Where <Organizational Relationship> represents Employee, Contingent Worker, or Person of iInterest.

Navigation:

Select the **Next >** button on the Job Data Page in fluid, provided there are no validation errors or you have chosen to proceed with the warnings.

This example illustrates the fields and controls on the Create <Organizational Relationship> - Summary page when you are adding job data information.



Field or Control	*Description*
Previous button	Select this button to correct or add additional information before you submit.

Field or Control	*Description*
Submit button	Select this button to submit and save the information to the system. When approvals are enabled for organizational relationships on the Person and Job Installation - Person and Organization Page, you will be taken to the Submit Confirmation Page to view that your request has successfully been submitted for approval, view the approval status, and take other actions normally available from the Manage Human Resources Dashboard. **Note:** Managers use fluid Approvals to view *Add Employee*, *Add Contingent Worker*, and *Add Person of Interest* data requests using the Pending Approvals - Add <Organizational Relationship> Page. When approvals are not enabled for an organizational relationship, you will be taken to the confirmation page to view that your entry has been created and allow you to initiate HR transactions.

PeopleSoft HCM delivers the Summary page with a pre-seeded configuration. Administrators can configure this page to hide or show fields, even those that were not changed using the Transaction Summary functionality. For more information on setting up this information, see the Configuring Transaction Summary documentation.

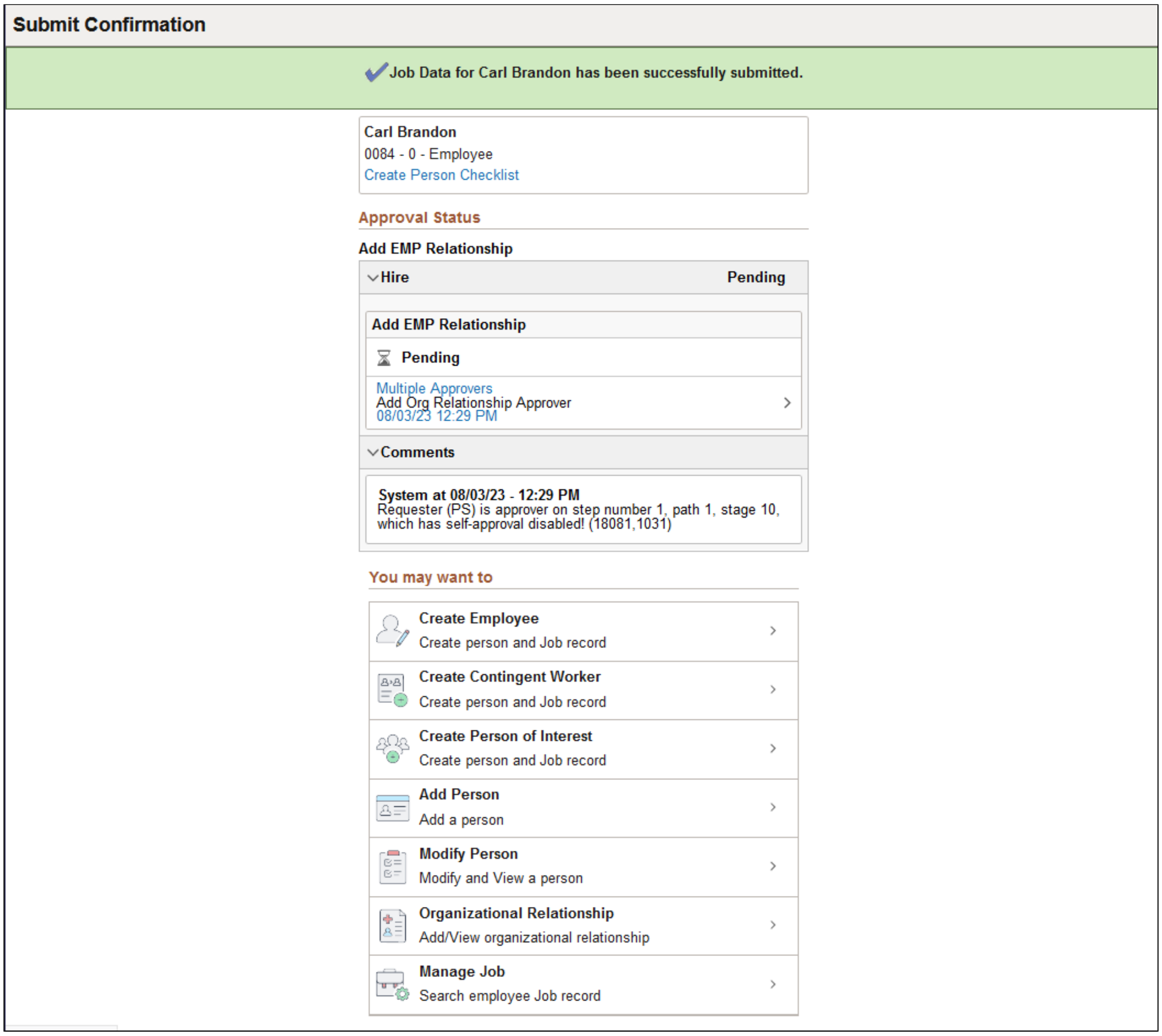
Submit Confirmation Page

Use the Submit Confirmation page (HR_JOB_ADD_SUB_FL) to confirm that a job data instance was successful created. You can also initiate adding or modifying person data, creating or view organizational relationships, creating a person checklist, or view or modify job data for an existing person from this page.

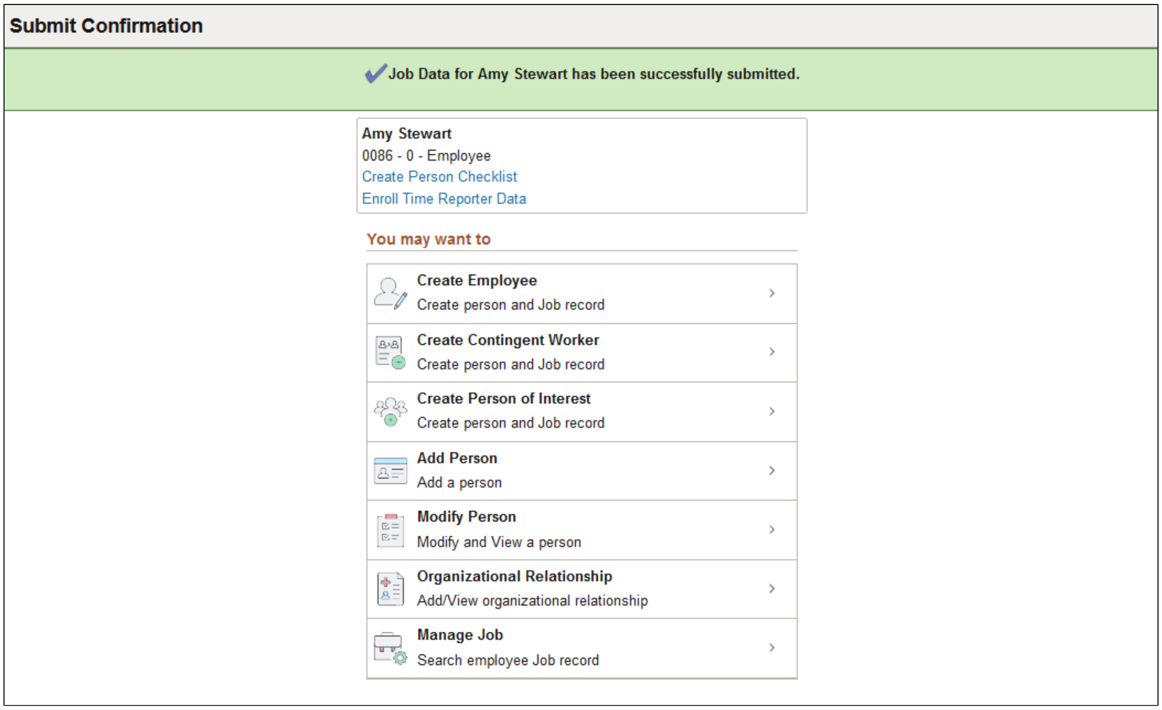
Navigation:

Select the **Submit >** button on the Create <Organizational Relationship> - Summary Page in fluid, provided there are no validation errors or you have chosen to proceed with the warnings.

This example illustrates the Submit Confirmation page when approvals are required for this transaction.



This example illustrates the Submit Confirmation page when approvals are not required to save this transaction.



Use this page to view the submission status and start a new transaction.

Field or Control	***Description***
Create Person Checklist link	Select to access the Person Checklist Page to perform all the required administrative tasks for the person you added.
Enter Time Reporter Data link	Select to enter time reporter data for this person.

Approval Status

Use this section to review the approval information for this request.

This section appears when approvals is enabled for an organizational relationship on the Person and Job Installation - Person and Organization Page.

Displays information about the approval process for this transaction.

Managers use fluid Approvals to view *Add Employee*, *Add Contingent Worker*, and *Add Person of Interest* data requests using the Pending Approvals - Add <Organizational Relationship> Page.

You may want to

This section provides quick access to many of the same transactions available from the Manage Human Resources Dashboard.

Note: The newly created employee ID information is not auto-carried to the page options accessible from this section and will therefore initiate a new transaction.

Field or Control	*Description*
Create Employee	Select to access the Create Employee Page and add a new person with an employee job instance.
Create Continent Worker	Select to access the Create Contingent Worker Page and add a new person with a contingent worker job instance.
Create Person of Interest	Select to access the Create Person of Interest Page and add a new person with a person of interest job instance.
Add Person	Select to access to the Add Person Page and add new person data only.
Modify Person	Select to access the Modify Person pages (see Modify Person Tile) and update only person data for an existing person.
Organizational Relationship	Select to access the (Fluid) Organizational Relationship Page and add or view a summary of a person's organizational relationships.
Manage Job	Select to access the Manage Job pages in fluid and add new job rows or update a person's historical job data using the fluid pages. See (Fluid) Updating Job Data.

Related Links

Controlling Data Access for POIs Without Jobs

(Classic) Adding Organizational Instances

“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)

Adding and Reviewing Organizational Relationships

This topic discusses how to add and view a person's organizational relationships.

Page Used to Add and View a Person's Organizational Relationships

Page Name	***Definition Name***	***Usage***
(Classic) Add a Person - Organizational Relationships Page	PERSONAL_DATA4	Select an organizational relationship and checklist to create for this person using the classic pages.
(Classic) Person Organizational Summary Page	PERSON_SUMMARY	Review a summary of a person's organizational relationships using the classic pages.
(Fluid) Organizational Relationship Tile	HC_HR_PERS_ORG_REL_FL (this is the cref for the tile)	Access the page to add or view a summary of a person's organizational relationships using the fluid pages.
(Fluid) Organizational Relationship Page	HR_PERS_ORG_REL_FL	Add or view a summary of a person's organizational relationships using the fluid pages.
(Fluid) Add Organizational Relationship Page	PERORG_ADD_REL_SCF	Initiate the process to add an organizational relationship for a person.

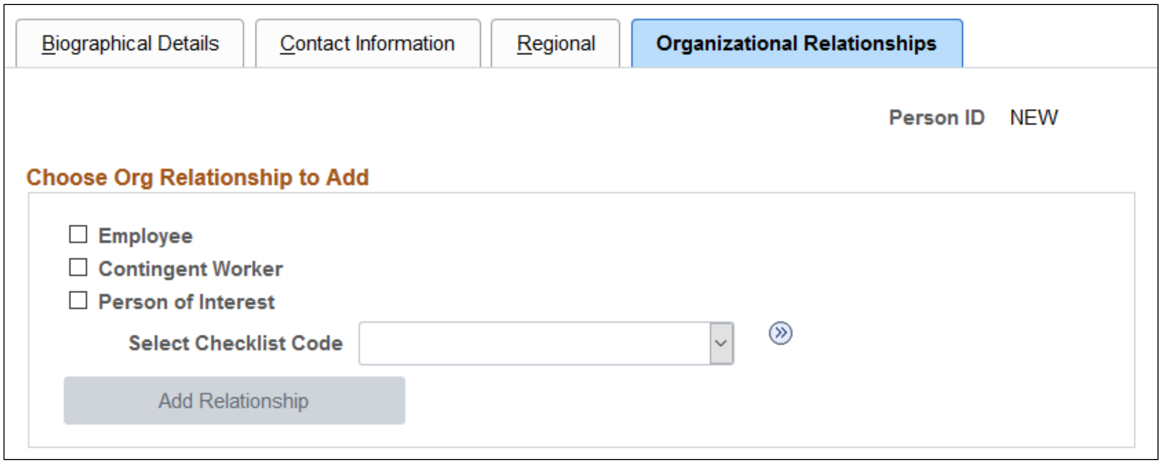
(Classic) Add a Person - Organizational Relationships Page

Use the Organizational Relationships page (PERSONAL_DATA4) to select an organizational relationship and checklist to create for this person using the classic pages.

Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Add a New Person** > **Organizational Relationships**
- **Workforce Administration** > **Personal Information** > **Add a Person** > **Organizational Relationships**

This example illustrates the fields and controls on the Organizational Relationships page. You can find definitions for the fields and controls later on this page.



Choose Org Relationship to Add

Select **Employee, Contingent Worker,** or **Person of Interest** to indicate the organizational relationship of this person.

If you select **Person of Interest,** select one of the available person of interest types:

- *External Instructor*
- *External Trainee*
- *Global Payroll Employee*
- *Other*
- *Other Payee*
- *Stock - Board Member*
- *Stock - Non-HR Employee*

You can assign any of the POI types that are defined on the POI_TYPE_TBL. After a person is created, the POI relationships can be added in various places. POIs without Jobs can be added from Administer Training and from within Campus Solutions. POIs with Jobs relationships are created from within the relevant applications, such as Stock, Global Payroll, Absence Management, Benefits, and Pension.

When you select **Employee, Contingent Worker,** or a POI type with a job, the **Empl Rcd Nbr** field appears. The system determines the next employee record number available for this person, or you can enter your own number and the system will verify that the number you entered does not already exist for this person.

To create a checklist for the person on the Employee Checklist page at the same time, select the appropriate checklist.

Note: Contingent workers are not paid in Payroll for North America. Customers using the E&G contract pay functionality, need to add contract workers using the Add Employment Instance component or select Employee on the Organizational Relationships page.

Field or Control	Description
Add the Relationship	Click this button to save the data on this component. If you select **Employee** or **Contingent Worker,** the system opens either the New Employment Instance component (JOB_DATA _EMP) or the New Contingent Worker Instance component (JOB_DATA_CWR). If you select **Person of Interest,** the system opens either the Person of Interest Job Data component (JOB_DATA_POI) or the Add a POI Reltn to a Person component (PERS_POI_ ADD), depending on the POI type you selected. **Note:** You can only select one relationship when you create the Personal Data record, but you can create additional relationships directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job, and Add a POI Type to a Person components.

Note: If you create a person but do not create and save a job data record or POI type record for them, the system will save the person as a POI without job with a POI Type of Unknown. When you do create and save a record for the person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system will delete the Unknown POI without job instance for that person.

(FPS) French Public Sector

If you have French Public Sector installed and you select **Employee,** you select one of these types of employee:

- *Commercial Employee*
- *French Public Sector Employee*

If you select *French Public Sector Employee,* the system displays these fields: **Business Unit, Department,** and **Job Code.** Complete these fields for the new employee.

Use the *French P Sector Employee* checklist for French public sector employees.

See “Understanding the Hiring Process” (PeopleSoft Human Resources Manage French Public Sector).

Related Links

Controlling Data Access for POIs Without Jobs
(Classic) Adding Organizational Instances
“Understanding Contract Pay Processing” (PeopleSoft Payroll for North America)

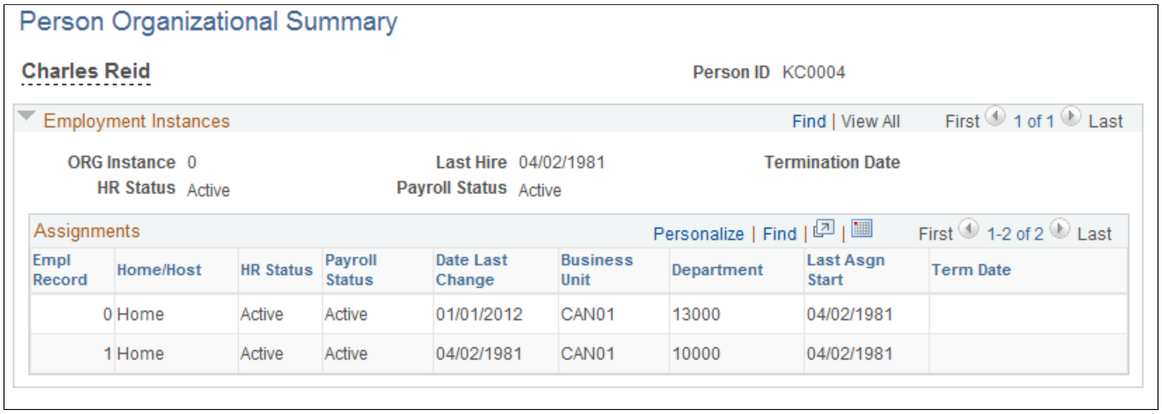
(Classic) Person Organizational Summary Page

Use the Person Organizational Summary page (PERSON_SUMMARY) to review a summary of a person's organizational relationships using the classic pages.

Navigation:

Workforce Administration > **Personal Information** > **Person Organizational Summary** > **Person Organizational Summary**

This example illustrates the Person Organizational Summary page in classic.



(Fluid) Organizational Relationship Tile

Use the Organizational Relationship tile to access the page to add or view a summary of a person's organizational relationships using the fluid pages.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Administrator Employee* role.

Navigation:

Select the Manage Human Resources Tile from the Workforce Administrator home page.

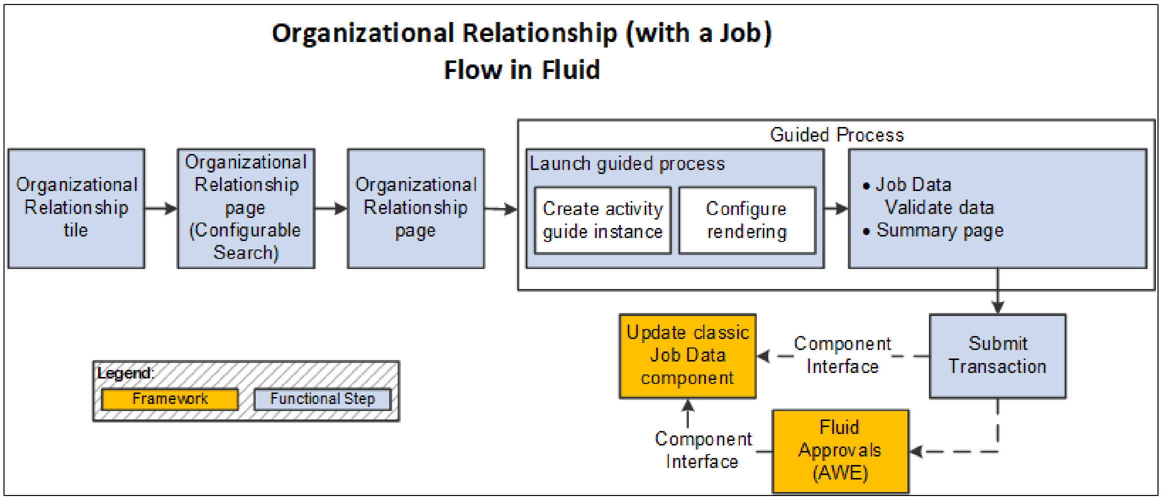
This example illustrates the Organizational Relationship tile.

Select this tile to begin the process to add a new organizational relationship for a person that already exists in the system using fluid.

Organizational Relationship (with a Job) Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly create and process a new organizational relationship for a person in the system:

This diagram shows the high-level functional pages and steps to create a new organizational relationship using the fluid pages.



Use the following steps to perform the fluid-based approach to quickly create and process a new organizational relationship for a person in the system:

1. Select the (Fluid) Organizational Relationship Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Create Person of Interest Tile**).
2. Use the configurable search page to find a person record (see "Setting Up Search Configuration" (Application Fundamentals)).
3. Select a person to continue the to (Fluid) Organizational Relationship Page where you will select to add a relationship.

   Note: You can also access this page when performing a duplicate Search/Match and selecting the Organizational Relationship link for an existing person.

4. Continue to the Add <Organizational Relationship> Relationship activity guide process.

   There are two steps in this activity guide:

   - The Job Data Page to enter job details.
   - The Organizational Relationship - Summary page (see Create <Organizational Relationship> - Summary Page) to review the data.

5. Submit the information to add the Job Data record.

If approvals are enable for the organization relationship, the request will be routed to the approvers for review prior to saving the information to the system.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

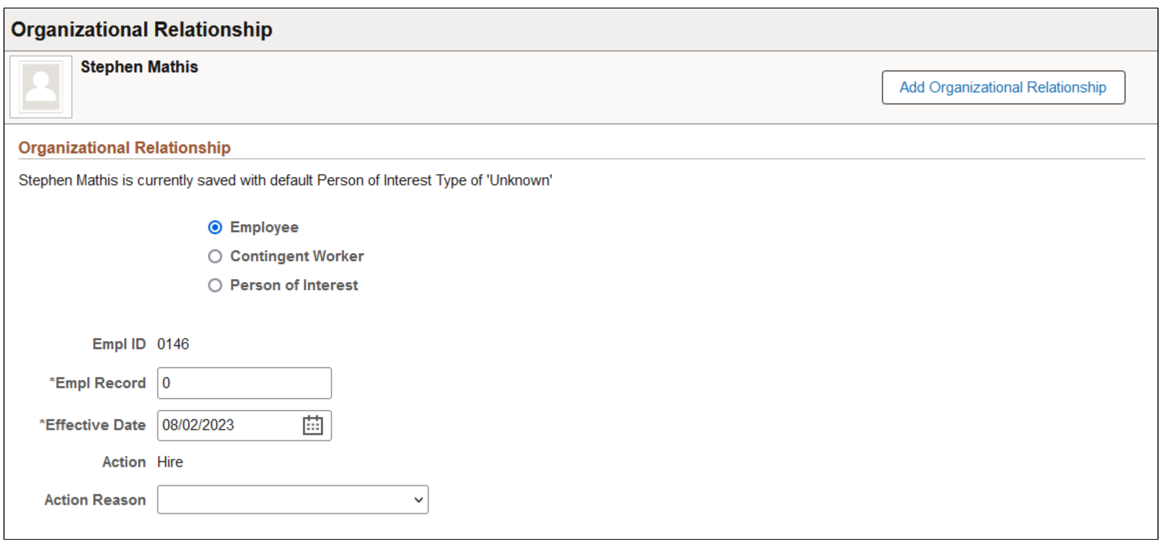
(Fluid) Organizational Relationship Page

Use the Organizational Relationship page (HR_PERS_ORG_REL_FL) to add or view a summary of a person's organizational relationships using the fluid pages.

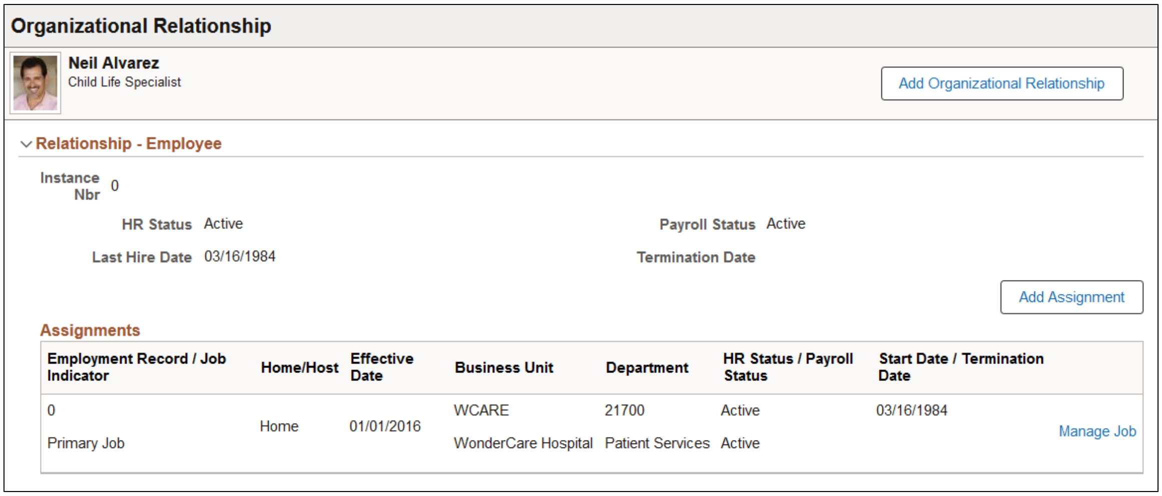
Navigation:

- Select the (Fluid) Organizational Relationship Tile from the Workforce Administrator home page and identify a person from whom you want to add or review organizational relationship data.
- Select the **Organizational Relationship** option from the Person Confirmation Page or Submit Confirmation Page.
- Select the **Organizational Relationship** link from the Add Person Page, Create Employee Page, Create Contingent Worker Page, or Create Person of Interest Page.

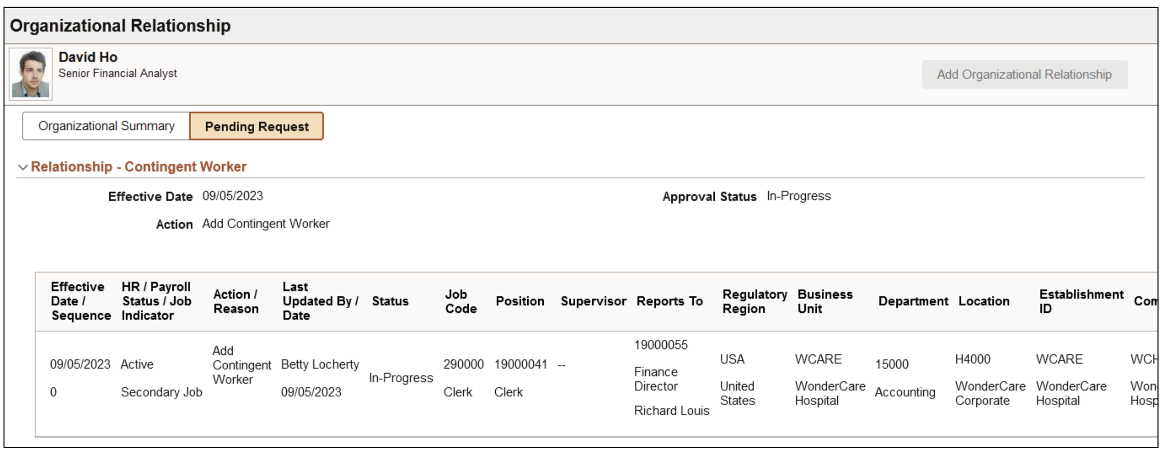
This example illustrates the Organizational Relationship page in fluid when adding the first relationship.



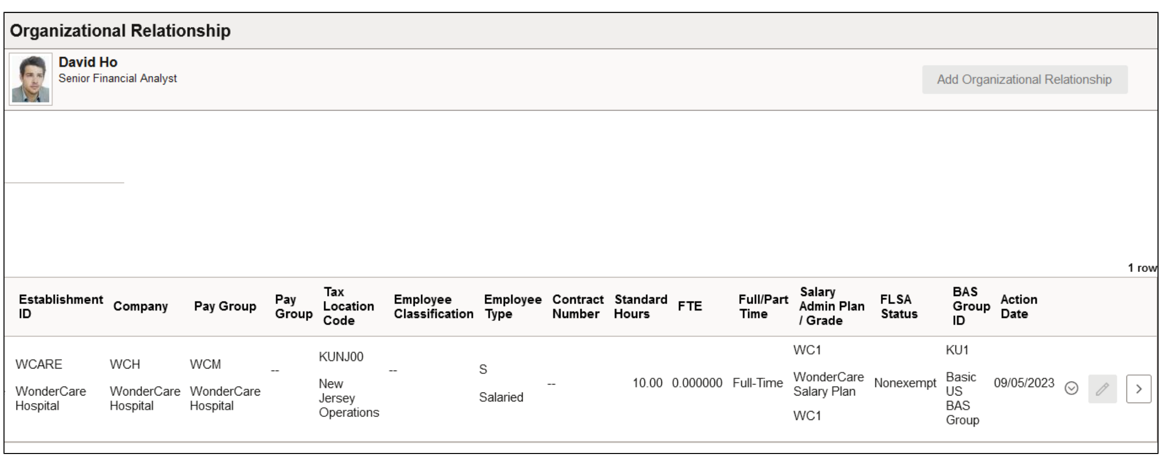
This example illustrates the Organizational Relationship page in fluid when viewing a person with relationship information.



This example illustrates the Organizational Relationship page: Pending Request tab (left scroll) when you have a pending request in progress (1 of 2).



This example illustrates the Organizational Relationship page: Pending Request tab (right scroll) when you have a pending request in progress (2 of 2).



Field or Control	*Description*
Add Organizational Relationship button	Select to access one of the following pages: • For a first time relationship with a job: Job Data Page • For a person with an existing relationship and you're wanting to add another relationship: (Fluid) Add Organizational Relationship Page to select and add an organizational relationship for this person. • For a person with a POI relationship without a job: (Fluid) Add Person of Interest or Maintain Person of Interest Page
Add Assignment button	Select to access the classic Job Data pages to add an additional assignment. See also Adding Additional Assignments.
Manage Job link	Select this link to access the Job Actions Summary Page to view job data rows and initiate the process to create, delete, edit, or view a job data row (based on your user access).

Pending Request tab

Displays the requested job information the organizational relationship request that is still under review.

Field or Control	*Description*
Related Actions icon button	Select this icon to open the Related Actions popup menu and select from a list of additional action items. Although options may vary, items may include: • *Approval Chain*: Opens the View Approval Chain page, where you can review information about all approvers and their approval status. • *Withdraw*: This option is available when a job row status is *In Progress* and you wish to remove the Create <Organizational Relationship> job data transaction request.
Edit button	Select to edit the job request.
Continue (>) button	Select to view the add <organizational relationship> job request.

(Fluid) Add Organizational Relationship Page

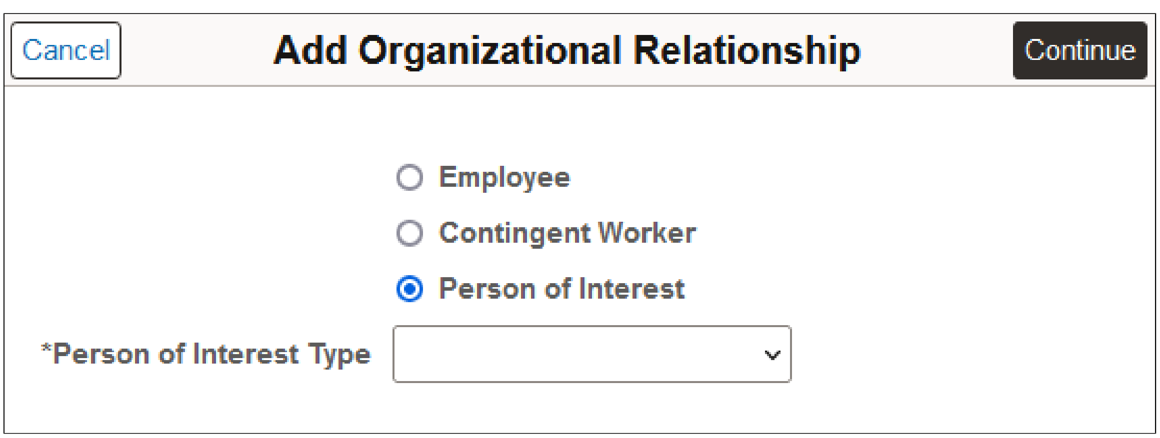
Use the Add Organizational Relationship page (PERORG_ADD_REL_SCF) to initiate the process to assign an organizational relationship to a person.

Navigation:

Select the **Add Organizational Relationship** button from the (Fluid) Organizational Relationship Page.

This example illustrates the Add Organizational Relationship page in fluid when you have selected the employee or contingent worker relationship.

This example illustrates the Add Organizational Relationship page in fluid when you have selected the person of interest relationship.



Field or Control	*Description*
Employee, **Contingent Worker**, or **Person of Interest** radio buttons	Select which type of relationship you want to add. The relationship determine the fields that will appear on this page.

This field is available when you select the **Person of Interest** option.

Field or Control	*Description*
Person of Interest Type	Select the type of person of interest relationship. Options include: • *External Instructor* • *External Trainee* • *Global Payroll Payee* • *Other* • *Other Payee* • *Stock - Board Member* • *Stock - Non- HR Employee*

The following table lists fields that are available when you select one of these job-related relationships:

- **Employee**
- **Contingent Worker**
- **Person of Interest** with these types:
  - *Global Payroll Payee*
  - *Other Payee*
  - *Stock - Board Member*
  - *Stock - Non- HR Employee*

Field or Control	*Description*
Empl ID and **Empl Record**	The system automatically populates the employee ID and the next employment record number. You can overwrite the employment record number, if needed.
Effective Date	Provides today's date by default. Enter the date the organizational relationship should begin.

Field or Control	*Description*
Action	Displays *Hire* for an employee. Displays *Add Contingent Worker* for a contingent worker. Displays *Add Person of Interest* for a person of interest.
Action Reason	Select the reason that is tied to the action to create this record. **Note:** The reason you select here may impact the steps and fields that are available for the Job Data activity guide process.
Continue button	Select to access one of the following pages: • For a first time relationship with a job: Job Data Page • For a person with a POI relationship without a job: (Fluid) Add Person of Interest or Maintain Person of Interest Page

(Fluid) Using Fluid Approvals to Approve Organizational Instances

Fluid Approvals supports the following Create <Organizational Relationship> approval transaction types:

- *Add Employee*
- *Add Contingent Worker*
- *Add Person of Interest*

To enable approvals for these transaction types, select **Enable Approval** option for each of the organizational relationship types that requires approvals on the Person and Job Installation - Person and Organization Page.

For using the common Pending Approvals and Approvals History pages, see also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

This video provides an overview of Fluid Approvals:

Video: PeopleSoft HCM Fluid Approvals

This topic describes how to approve organizational instances requests using Fluid Approvals.

Pages Used to Approve Organizational Instances Using Fluid

Page Name	***Definition Name***	***Usage***
Pending Approvals - Add <Organizational Relationship> Page	EOAWMA_TXNHDTL_FL	Review and take action on the add <organizational relationship> requests.
Add <Organizational Relationship> Page (See the Job Data Page)	HR_JOBDATA_ADD_FL	Review details about the person's job row instance.
View Exception(s) Page	HR_ORG_CIEXCEPT_FL	Review warnings and errors for this request.

Pending Approvals - Add <Organizational Relationship> Page

Use the Pending Approvals - Add <Organizational Relationship> page (EOAWMA_TXNHDTL_FL) to review and take action on the add <organizational relationship> requests.

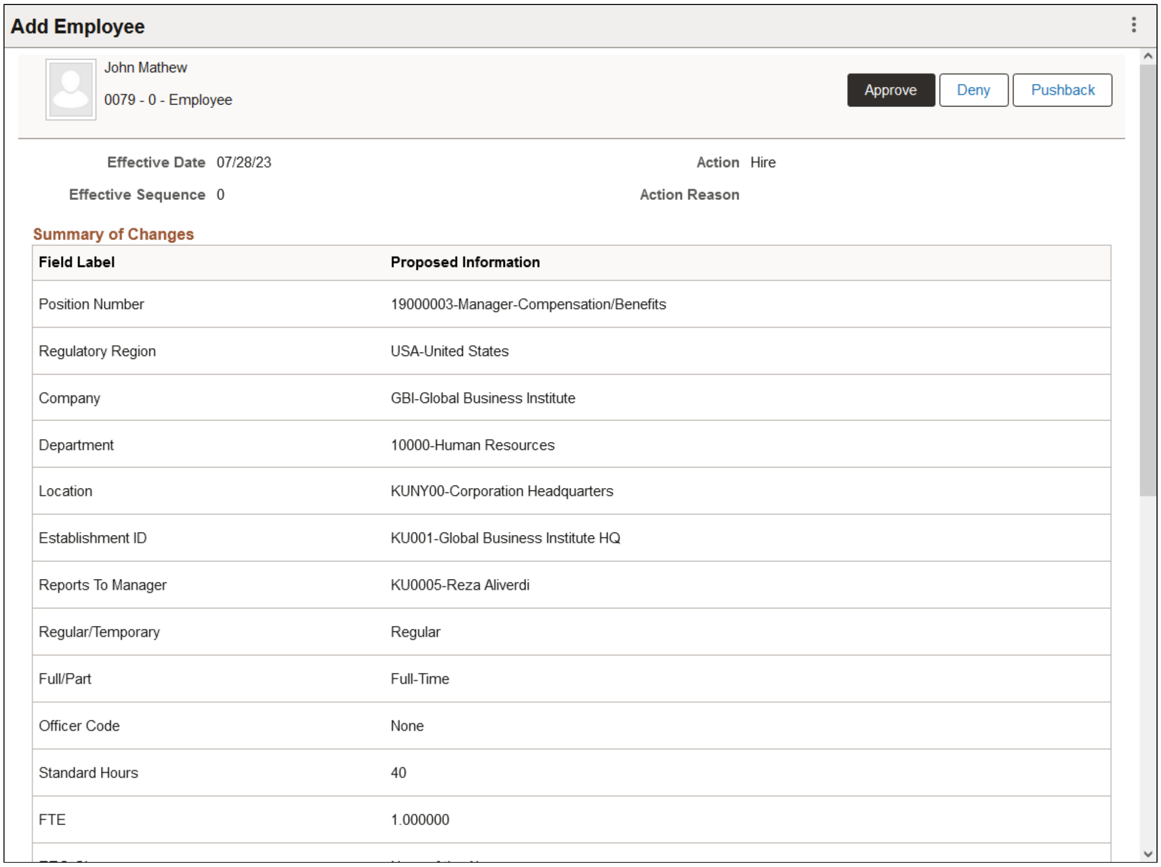
Note: Where <Organizational Relationship> represents Employee, Contingent Worker, or Person of Interest. The page title will display the name based on the transaction type you selected on the Pending Approvals page.

Navigation:

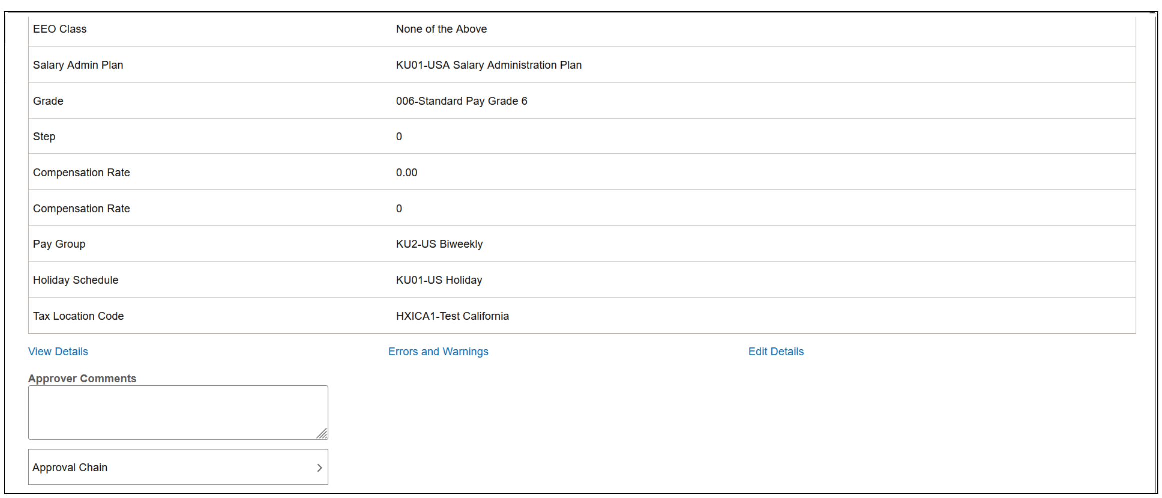
- Select the Approvals tile on the Manager Self Service home page to access the Pending Approvals page. Then select any of the following transaction rows on the Pending Approvals page.
  - *Add Employee*
  - *Add Contingent Worker*
  - *Add Person of Interest*
- Select the Notifications button in the banner or view the Notifications side panel and select the appropriate approval notification.

  Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
  Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
  Notifications delivered with HCM Image 47 or later must use Notification Composer.
  For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

This example illustrates the fields and controls on the Pending Approvals - Add <Organizational Relationship> page (1 of 2).



This example illustrates the fields and controls on the Pending Approvals - Add <Organizational Relationship> page (1 of 2).



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (Application Fundamentals).

Field or Control	*Description*
Approve , **Deny**, and **Pushback** buttons	Use these buttons to take action on the requested approval.

Summary of Changes

Use this section to view summary information identifying the fields that were updated in the transaction that you are being asked to approve. The section will show proposed values requested for the person's job record.

Additional Details

Field or Control	*Description*
View Details	Click this link to open a new browser window tab to access the Job Data Page where the person added the instance. You can review details about the person's job row instance from this page. **Note:** The approver must have access to the Job Data page to review this information.
Errors and Warnings link	Click this link to access the View Exception(s) Page to review warnings and errors for this request.
Edit Details link	Select this link to access the fluid Job Data Page, where you can make updates to the job record, if needed, prior to approving. **Note:** You need access to all the steps in the activity guide process to ensure all necessary edits and errors are corrected. After you submit the changes, you will be returned to the approval pages where you will see your changes. You will need to approve the request for these changes to take place.

Approver Comments

Field or Control	*Description*
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Adding Additional Assignments

These topics provide an overview of the process of adding additional assignments, list prerequisites, and discuss how to add additional assignments.

Pages Used to Add Concurrent Jobs

Page Name	***Definition Name***	***Usage***
Add Additional Assignment Page	PER_ORG_INST_ASGN	Enter additional worker assignments and access the Concurrent Job Data component to create new assignments.
Work Location Page	JOB_DATA1	Enter position and location information for a person's concurrent job, including the regulatory region, company, department, and location.
Job Information Page	JOB_DATA_JOBCODE	Enter information about a person's concurrent job, including status, employee class, shift, or standard hours.
Job Labor Page	JOB_LABOR	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll Page	JOB_DATA2	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Job Data - Salary Plan Page	JOB_DATA_SALPLAN	Enter information about a person's salary plan.
Compensation Page	JOB_DATA3	Enter compensation information.
Employment Information Page	EMPLOYMENT_DTA1	Enter optional data, such as an employee's business title.
Job Earnings Distribution Page	JOB_DATA_ERNDIST	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Page Name	***Definition Name***	***Usage***
Benefit Program Participation Page	JOB_DATA_BENPRG	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.

See (Classic) Adding Organizational Instances

Understanding the Process of Adding Additional Jobs

PeopleSoft Human Resources enables you to keep complete job information about workers who hold more than one job at a time in an organization.

If you set up PeopleSoft HCM security to allow workers to have multiple jobs, you can add an additional assignment to a worker's employment record. Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) in Administer Workforce to add new jobs for workers who already have one or more jobs. From the Add Additional Assignment page (PER_ORG_INST_ASGN), access the Concurrent Job Data component (JOB_DATA_CONCUR) to enter data for the new job. The component consists of the same pages as the Job Data component. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Payroll for North America.

Note: (USF) Use the Concurrent Hire USF component (EE_CONC_HIRE) instead of the Add Additional Assignment component.
Do not use the Add Additional Assignment component for adding temporary assignments where the substantive job must be suspended for the duration of the temporary assignment. Use the Job Data component instead.
Update job data for concurrent jobs on the Job Data component.

See (Classic) Adding Organizational Instances.

Related Links

Organizational Relationships

Entering Temporary Assignments

Understanding Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the worker's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where a worker has three concurrent jobs:

Apply Job 1's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Job 3's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Separate Benefits to Each Job

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	1
Job 3	2	2

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	2

When you add a concurrent job, the system sets the default benefit record number on the Benefit Program Participation page to *0.* If you change the benefit record number, the system deselects and repopulates the **Benefit Program** field with the data attached to the benefit record number that you enter. If the benefit record number that you enter doesn't match any existing benefit record number for the worker, the system populates the **Effective Date** field with the worker's hire date and the **Benefits Program** field with the default benefit program for the worker's pay group.

Note: Use the Benefit Program Participation page to maintain benefits program information.

Prerequisites

Before you can add multiple jobs for the workforce, you must update the user security so that users have access to the menu options that they need.

When a worker has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

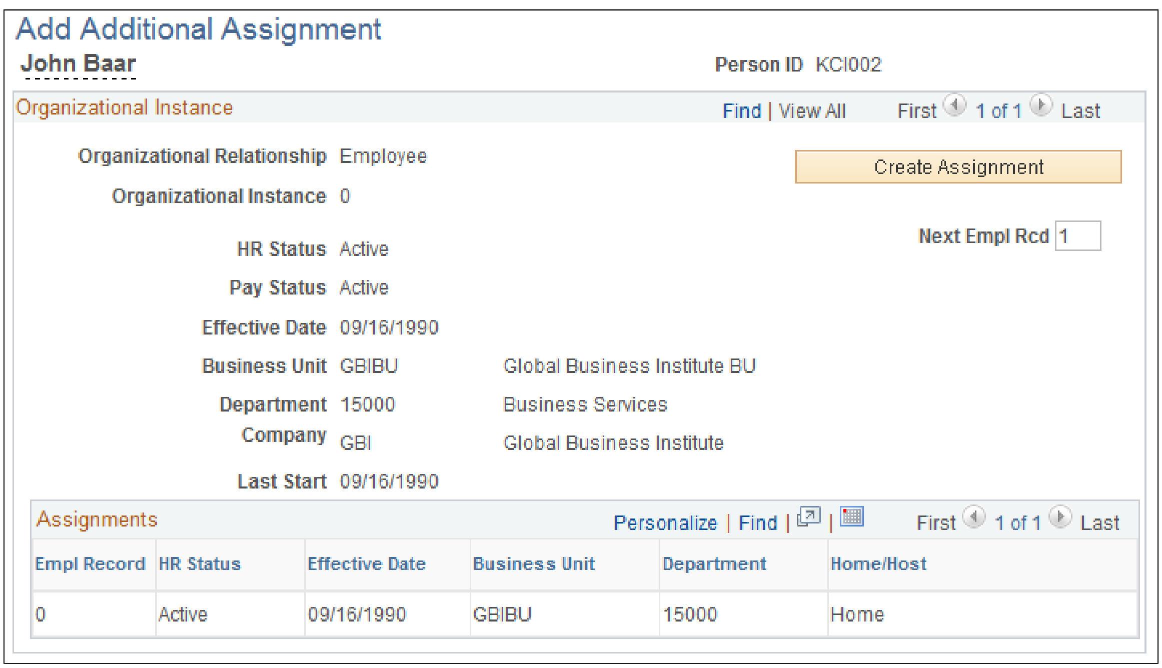
Add Additional Assignment Page

Use the Add Additional Assignment page (PER_ORG_INST_ASGN) to enter additional worker assignments and access the Concurrent Job Data component to create new assignments.

Navigation:

Workforce Administration > **Job Information** > **Add Additional Assignment** > **Add Additional Assignment**

This example illustrates the fields and controls on the Add Additional Assignment page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Create Assignment	Click to access the Job Data record to enter specific information about the new assignment.

Field or Control	Description
Org Relation (organizational relationship)	Displays the person's organizational relationship.
Organizational Instance	Displays the instance number for this relationship.
Next Empl Rcd (next employee record)	Enter the employment record number for the next assignment. This number should be unique from all other employment record numbers currently held by this person.
Assignments	Lists the assignments under this organizational instance by employment record number.

Hiring Job Applicants

To hire applicants, use the Manage Hires (HR_MANAGE_HIRES) component.

These topics discuss hiring job applicants.

The Add Employment Instance and Add Contingent Worker components are commonly used to increase your workforce, but they are not the only components. You can also use the Manage Hires component for hiring applicants.

The Manage Hire page displays a list of applicants that have gone through the recruiting process and are ready to be hired. Selecting an applicant name on the Manage Hires page opens the Manage Hire Details page where you can review job information and transfer applicant information to the personal data and job data records to complete the hire.

Note: The Manage Hires component is also used with the Smart HR (template-based) transactions process.

Pages Used to Hire Job Applicants

Page Name	Definition Name	Usage
Manage Hires Page	HR_MANAGE_HIRES	Manage hires. Displays a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the template-based hire process.
Manage Hires Detail Page	HR_MNGHIRE_DET	Review hire details and initiate the hiring process. View detailed data for job applicants.

Related Links

Using Smart HR Templates and Transactions

Manage Hires Page

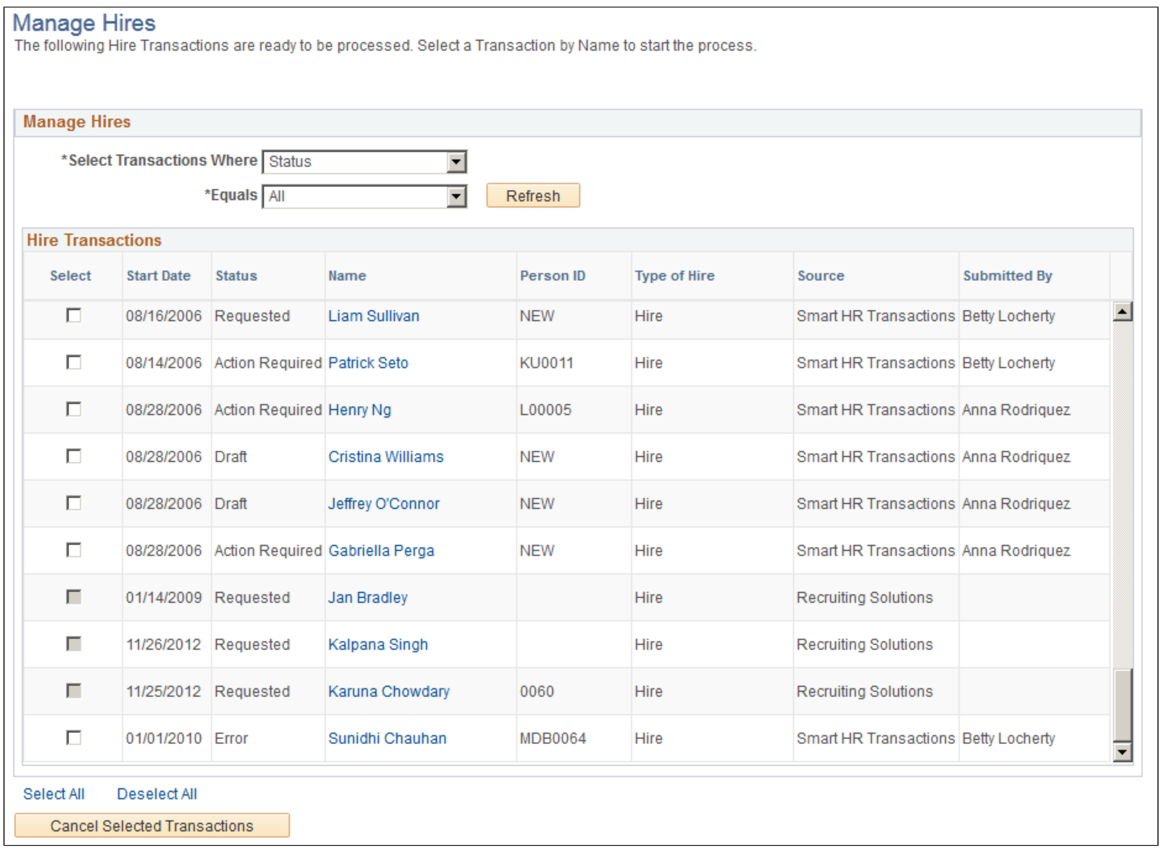
Use the Manage Hires page (HR_MANAGE_HIRES) to manage hires.

Displays a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the Smart HR transaction process.

Navigation:

Workforce Administration > **Personal Information** > **Manage Hires** > **Manage Hires**

This example illustrates the fields and controls on the Manage Hires page. You can find definitions for the fields and controls later on this page.



The HR administrator uses the Manage Hires page to view hires that may be in draft status that the end user started, to view hires that require HR review prior to committing to the database, or to review hires that encountered errors upon saving and require an HR administrator's review to complete the hire process.

When the template administrator sets up the templates, he or she can select or deselect the **Automatic Database Update** check box. If selected, the end user is able to save the hire to the database or save the hire in draft status. If deselected, then the end user only has the option to save the hire as a draft or to submit the hire to HR. In these instances, the HR administrator uses the Manage Hires page to view people and continue with the hire process.

Field or Control	***Description***
Select Transactions Where	Select the value that represents how you want the search to produce results. Valid values are: • *Source, Status,* and *Type of Hire* – When selecting any of these option, the system displays the **Equals** field. • *Start Date* – When selecting this option, the system displays the **From** and **To** date fields.
Equals	Select a value that will assist viewing and managing hires. This field is visible if the when you select *Source, Status,* or *Type of Hire* in the **Select Transaction Where** field. This list indicates the **Equals** values that are available based on the following **Select Transaction Where** field option you selected: • *Source* – Values in this field are *Recruiting Solutions* and *Smart HR Transactions.* • *Status* – Values in this field are *Action Required, All, Draft, Error,* and *Requested.* • *Type of Hire* – Values in this field are *Add Concurrent Job, Add Contingent Worker, Hire, Rehire,* and *Transfer.*
From: and**To:**	These fields are visible when you select *Start Date* in the **Select Transaction Where** field. Enter a date range for hire requests submitted within a specified time period.
Refresh	Click to update the list of applicants or hires in the Hire Transactions region when you change the value of the **Select Transaction Where** field and/or the **Equals** field.
Select	Use this check box to select transactions that you want to cancel. The check box is active only for rows where the **Source** is *Template* (template-based hire). You cannot use this page to cancel transactions where the source is *Recruiting* (recruiting solutions); instead, you must cancel the transaction using the Withdraw from Hire action on the Job Opening page in PeopleSoft Recruiting Solutions.

Field or Control	***Description***
Status	Status values include *Action Required, Draft, Error, Requested,* and *All.* The initial status for job applicants who were processed through PeopleSoft Recruiting Solutions is *Requested.* If the hiring request is cancelled from the Recruiting Solutions application when the hiring process is partially complete (you have created a personal data record, but not a job record), then the status changes to *Action Required,* indicating that an HR administrator needs to reverse the incomplete hiring process.
Name	Click a person's name to access the person's data in the Manage Hires Detail page, where you can review job details and initiate the hiring process.
Person ID	This field is blank when you have not yet begun the hire process for a person. Otherwise, it displays the person ID that was assigned when you created a personal data record for the person.
Source	View hire requests submitted by Recruiting Solutions *(Recruiting)* or by the Smart HR Templates *(Smart HR Transactions)* process.
Select and **Cancel Selected Transactions**	Select the check box for a person and click the **Cancel Selected Transactions** button to cancel the hire request. You cannot select transactions where the source is *Recruiting* (recruiting solutions). Although you cannot cancel recruiting transactions from this page, recruiting users can withdraw a hire request. If the transaction request is *Requested* at the time the withdraw hire message is received, the system cancels the transaction and the transaction no longer appears on this page.

Related Links

PeopleSoft Talent Acquisition Manager

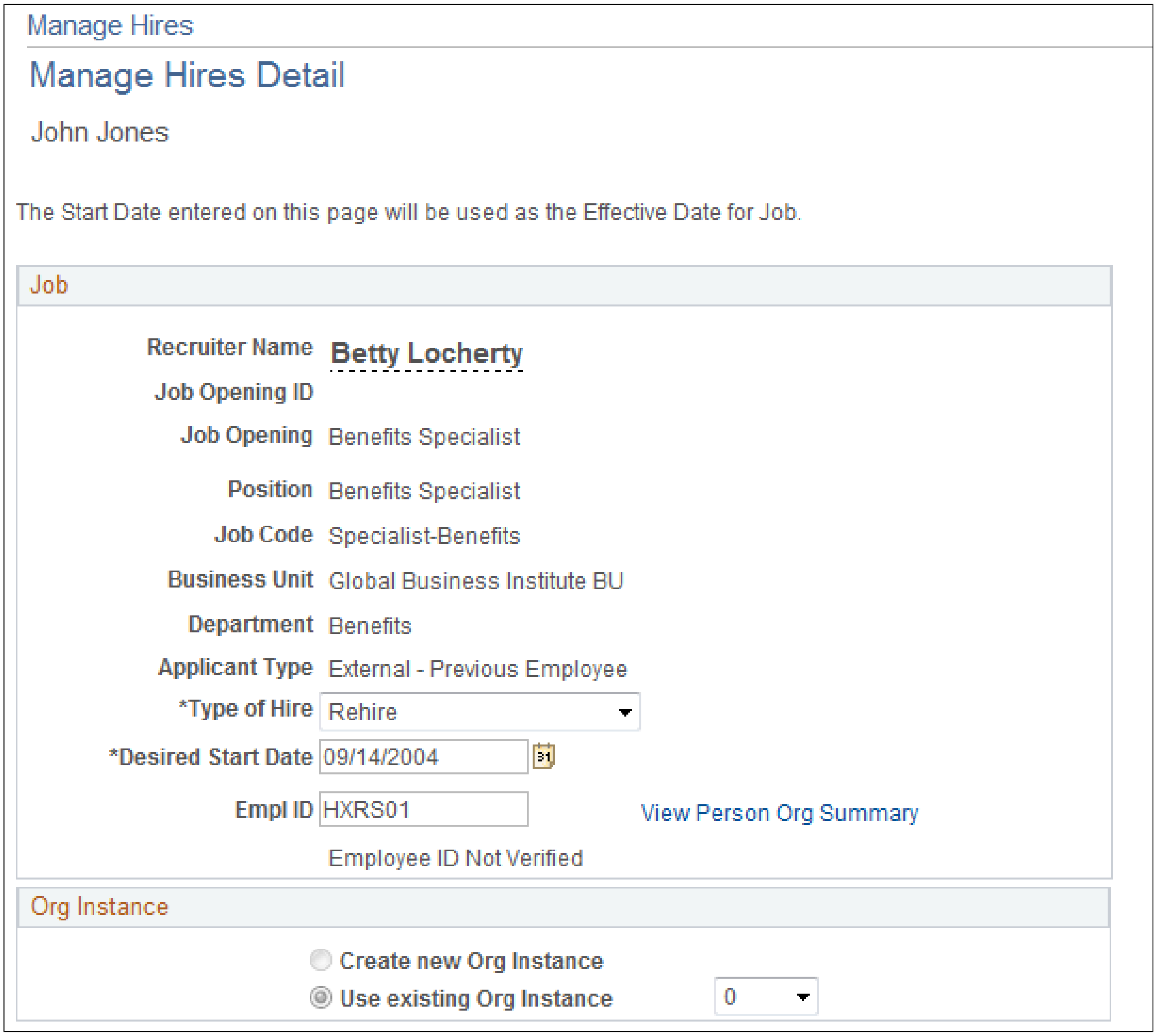
Manage Hires Detail Page

Use the Manage Hires Detail page (HR_MNGHIRE_DET) to review hire details and initiate or complete the hiring process.

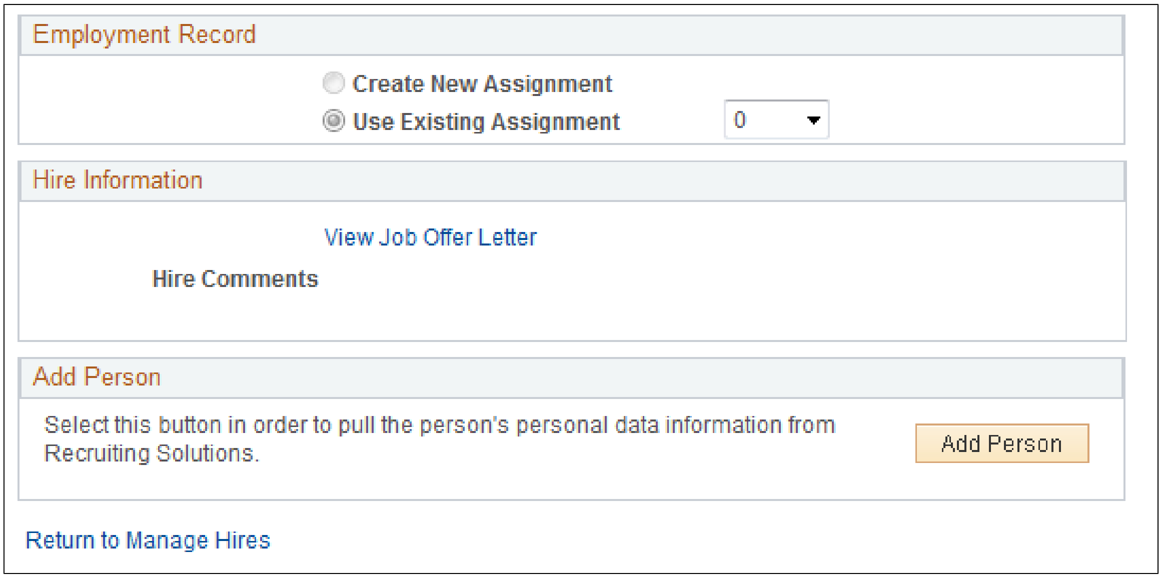
Navigation:

Click the name link for a person.

This example illustrates the fields and controls on the Manage Hires Detail page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Manage Hires Detail page (2 of 2). You can find definitions for the fields and controls later on this page.



Job

The Job group box displays information about the job for which the person is to be hired.

Field or Control	***Description***
Type of Hire	Select *Hire* or *Add Contingent Worker.* The default value comes from the recruiting application.
Desired Start Date	Displays a default start date that comes from the recruiting application. You can override this value. This date becomes the default effective date of the job record that you create when you hire this applicant.

Field or Control	Description
Empl ID (employee ID)	If you have initiated the hire process and saved a personal data record for the person, the person's employee ID is displayed, but is not editable. If the field is blank, then the system generates a unique employee ID when you save the person's personal data record. If an editable value appears, the system uses this value as the employee ID when you create the person's personal data record. If the employee ID already exists, a warning appears when you click the **Add Person** button to begin the hire process. PeopleSoft Recruiting Solutions provides a default employee ID if the applicant was associated with an existing employee ID (for example, the person is an internal transfer or a rehire). A text message on the page indicates whether the value provided by the recruiting application has been verified.
View Person Org Summary	If an employee ID exists, click this link to open the Person Organizational Summary page for the person in a new window.

Hire Information

Field or Control	Description
View Job Offer Letter	Click this link to open the applicant's offer letter in a new window. PeopleSoft Recruiting Solutions users can choose whether to make offer letters available for viewing. If no offer letter has been made available, then the link does not appear on this page.

Field or Control	*Description*
Hire Comments	Displays any hire-related comments that were sent from PeopleSoft Recruiting Solutions. These comments can come from two sources: • A recruiter manually enters comments when submitting the person for hire. • The system generates a message when a recruiter submits a request to withdraw the hire request but the hiring process has already begun. This message advises the HR administrator to use the Delete ID process to roll back the incomplete hire.

Add Person

Field or Control	*Description*
Add Person and**View/Edit Person**	If you have not yet begun the hiring process, click the **Add Person** button to access the Personal Data component where you can add the person to the system. The system transfers applicant data to the Personal Data component to simplify data entry. After you save the personal data record, the **Add Person** group box and button become the **View/Edit Person** group box and link. Click the link to open the personal data component and review or update the data.

Add Job

This group box appears only after you have created a personal data record for the applicant.

Field or Control	*Description*
Add Job	If you have created the applicant's personal data, but you have not yet entered job data, click the **Add Job** button to access the Job Data component where you can complete the hire process. The system transfers applicant data to the Job Data component to simplify data entry. After you save the job data record, the applicant no longer appears in the Manage Hires page.

Using Smart HR Templates and Transactions

These topics provide an overview of Smart HR templates, list prerequisites, and discuss how to enter data using Smart HR transactions.

Pages Used to Increase the Workforce Through Templates

Page Name	***Definition Name***	***Usage***
Smart HR Transactions Page	HR_TBH_EULIST	Select a template or person to process a Smart HR transaction.
Enter Transaction Details Page	HR_TBH_ADD	Enter transaction details, such as the persons's job effective date, to start the Smart HR transaction process for a person.
Enter Transaction Information Page	HR_TBH_DATA	Enter employee information details for the person's transaction. The page will display the tabs and fields defined by the template you selected for this person.
Person Match Found Page	HR_TBH_SRMATCH	Identify if a person match is found in the system. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the transaction.
Select an Action Page	HR_TBH_ACTION	Select an action if a matching person with an inactive status is found in the database.
Confirmation Page Further Processing Required Page	HR_TBH_CONFIRM	Displays information about the transaction status after performing a Smart HR transaction.
Transaction Status Page	HR_TBH_STATUS	View the status of a Smart HR transaction with a pending, cancelled, or processed HR review status.
Manage Transactions Page	HR_TBH_MANAGE_TXN	View Smart HR transactions (hire and non-hire transactions) that are either in draft status, require HR review prior to committing to the database, encountered errors upon saving and require a HR administrator's review to complete the transaction, or to display a list showing all transactions with these statuses.

Page Name	Definition Name	Usage
Manage Transaction Details Page	HR_TBH_HIREDET	View the transaction details entered during a Smart HR transaction and complete the process.
Manage Hires Page	HR_MANAGE_HIRES	View a list of hires that have gone through either the recruiting process or persons hired through the Smart HR transaction process.
Manage Hire Details Page	HR_TBH_HIREDET	View hire details entered during a Smart HR hire transaction and complete the hire process.
Manage Transaction Details - Transaction Errors Detail Page Manage Hire Details - Transaction Errors Detail Page	HR_TBH_ERRORS	View the errors that occur during the save of the transaction.
Manage Transaction Details - Possible Person Matches Page Manage Hire Details - Possible Person Matches Page	HR_TBH_HIRESM	Determine if a person in the Search Match process matches the person for which you are performing a transaction.

Understanding Smart HR Templates and Transactions

The Smart HR process, or template-based transactions, enables you to expedite the hiring of individuals. Using a template-driven approach, it offers a way to streamline repetitive data entry by reducing the current data entry process through the Personal Data and Job Data pages.

There are three types of users that will facilitate Smart HR transactions:

- The template administrator creates various templates for use by the end users.
- The end user enters data for persons being added to the database. The amount of data an end user enters is dependant on the types of templates created. Security determines which templates the end user can access.
- The human resources administrator (HR administrator) determines at the template level whether the end user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end user saves a person's data to the database for completion.

This table summarizes the pages used by each type of user:

Template Administrator	***End User***	***HR Administrator***

• Template Record/Field
• Template Category Table
• Template Section
• Template Transaction Type
  ◦ Transaction Type
  ◦ Components
  ◦ Sections
• Copy Smart HR Transaction Type
• Smart HR Template Creation:
  ◦ Configuration
  ◦ Sections
  ◦ Person Rules
• Copy Smart HR Template
	• Smart HR for Managers
	  ◦ Enter Transaction Details
	  ◦ Enter Transaction Information
	  ◦ Person Match Found
	  ◦ Select an Action
	  ◦ Confirmation
	• Transaction Status
		• Manage Smart HR Transactions
		• Manage Hires:
		  ◦ Manage Hire Details
		  ◦ Error Transaction
		• Add Person
		• Job Data
		• Person Profile

Note: This topic focuses on the records the end user and HR administrator use in the Smart HR transaction process. Template setup by the template administrator is discussed in other topics.

See Setting Up Smart HR Templates.

To start the Smart HR transaction process, select a pre-configured template. This template will display a simple entry page or multiple data entry pages, depending upon how it was set up. The fields on this page may also be hidden or values will be provided by defaulted, based on how the template was set up by the template administrator. After the transaction data is entered it can be either saved directly to the HR system, reviewed by an human resources administrator, or saved for later.

When templates are created by the template administrator, the template status is set to *Test* (T). After the template is tested and ready for use, the status will need to be changed to *Active* (A). When you are searching for templates to use in the Smart HR transaction process, the only templates that are available are those with a status of *Active* (A). End users will only be able to see templates for which they have row-level security access.

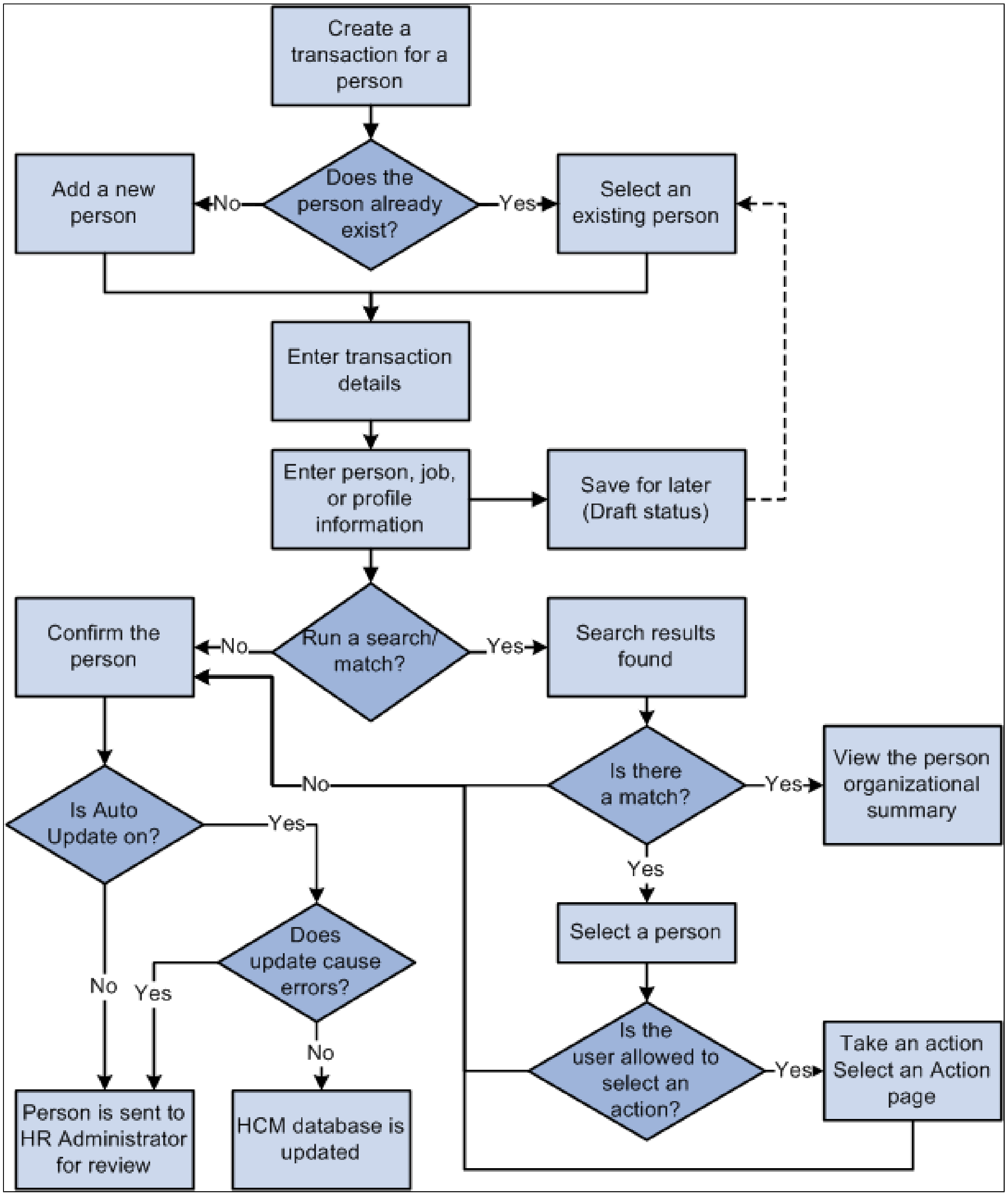
When the data is submitted for processing, the appropriate service-oriented architecture (SOA) or component interface (CI) will be called to process the actual transaction. If an error occurs during processing, a line item will be added to the Manage Smart HR Transactions component. If it is for a hire transaction it will also be added to the Manage Hires component. From these pages, a human resources administrator is able to review the data, make corrections, resubmit for processing, or cancel the transaction. The human resources administer is able to do this by accessing the transaction template as a whole, or though the Personal Data, the Job Data, and the Person Profile components. What the administrator accesses depends on the type of transaction that was performed. He or she can complete the transaction but can also modify the data entered by the end user, as needed, prior to committing the changes to the database.

Smart HR (Template-Based Transaction) Process Flow

When hiring or updating a person's personal, job, or profile data using the Smart HR feature, you will use the following pages:

- Smart HR Transactions.
- Enter Transaction Details.
- Enter Transaction Information.
- Person Match Found.
- Select an Action.
- Confirmation.
- Transaction Status.

This diagram illustrates the Smart HR process, during which the user performs a transaction using the Smart HR Transactions or Smart HR for Managers components. Here the user, enters transaction details, such as person, job, and profile information, may determine if this person matches another person already in the system, and confirms the transaction data. Depending on the template definition, the confirmed information will either update the database directly, or it will be routed to an HR administrator for review.



Smart HR Transactions

The **Transactions in Progress** grid on the Smart HR Transactions page displays the people who are in draft status within the Smart HR transaction process. The list of people is filtered based on the operator ID of the person accessing the page. The page will show only the entries that the end user has previously entered using their operator ID. On this page you can delete a person which will delete the person's information.

Enter Transaction Details

On the Enter Transaction Details page, enter basic information for the transaction. On this page you may be required to enter information such as the:

- Person ID.
- Job effective date.
- Job action.
- Action reason code.
- Name and address formats.

Note: Depending on how the template administrator has set up the template configuration this information will be display only, visible and editable, or hidden.

Also, for informational purposes, this page will display such information as the:

- Template name.
- Country.
- Organizational relationship, which is the type of person for which you are performing a transaction, such as employee or contingent worker.
- Template category.

Enter Transaction Information

The Enter Transaction Information page is where you will enter name details, home and mailing address details, National ID, and job details. The number of sections and fields on this page are dependent on how the template chosen has been configured by the template administrator.

Person Match Found

The Person Match Found page displays the possible person matches. The match parameters are set up by the template administrator. If a match is found, select the person from the list and the EmplID is carried forward in the transaction. If no match is found, you can continue with the transaction by clicking the *Not a Match - Continue with Hire* button. The *Not a Match - Continue with Hire* button is not available for non-hire or non-rehire transactions; an employee must be in the system for these types of transactions.

Select an Action

The Select an Action page displays only if a match is found during the search and you are allowed to take some action (defined at the template level). If the user is not allowed to take any action, the page will not display and a transaction request for the person is sent to the HR administrator.

Confirmation

The Confirmation page displays if the user has successfully saved the data to the system. There are four different messages displayed on the conformation page based on the template level set up and the security access of the user's operator ID. The confirmation page will display one of the following four messages:

- *Save Confirmation.* The system displays this message if the user has access to save the person to the database and a Person ID is generated.
- *Save for Later Confirmation.* The system displays this message if the person entered is saved in draft status and a Person ID is not generated.
- *Submit Confirmation.* The system displays this message if the user has access to enter the data but not save it to the database. The person in the transaction is submitted to Human Resources for final processing.
- *Further Processing Required.* The system displays this message if errors were encountered while trying to save to the database. The person's transaction information is then sent to human resources to complete the transaction.

When the data has been confirmed it is stored in the staging tables HR_TBH_HDR and HR_TBH_DATA. The HR_TBH_HDR table stores the high-level information, which includes a unique sequence number representing the transaction ID, the template ID, the operator ID of the user who entered the data, the status representing various stages of the transaction, and the transaction date. The HR_TBH_DATA table stores the record name, field name, and value of the Record/Field with the unique transaction ID. This table is a child of the HR_TBH_HDR table.

The status field on the HR_TBH_HDR may have one of the values displayed in the table below:

Status	***Definition***	***Scenario***
DFRT	Draft	The user has begun to enter data but saved to continue later.
SBMT	Submitted	The user entered all required data based on the template configuration.
ACTR	Action Required	The user decided to send the transaction request to the HR administrator to review or complete the rest of the information.
EROR	Error	The user encountered some error while saving the data in to the system.
HIRE	Hired/Added	Once the HR administrator completes the hire process by adding person and job information into the system, the status of the row will change to *Hire/Added.*

Status	***Definition***	***Scenario***
COMP	Completed	Once the row is deleted by the user, the status of the row will change to *Completed.*

Error Transaction

The Error Transaction page is displayed when the template administrator is testing the template and the test is unsuccessful. This page is also available to the HR administrator on the Manage Transaction Details and Manage Hire Details pages. This page will display the template used, the transaction causing the error, the transaction ID, and the start date. It will also give a description of the error found.

Transaction Status

The Transaction Status page displays the persons being processed by the Smart HR transaction process and their status. The list is filtered based on the operator ID of the user. Also, the user has the option of deleting a row.

Note: This page does not show people in draft status. You can only view those individuals currently being processed by the HR department, view those who have been cancelled by the HR department, and those whose transactions have been successfully entered. You can remove people with the transaction status of *Cancelled* and *Processed* .

Prerequisite

Smart HR templates provide a configurable, template-driven approach, where you can define default data for various sections in the transaction process, such as for a hire or to update a persons personal, job, or profile data. You will be able to create templates to meet different user needs by configuring the template to hide or display specific fields. This allows your Human Resources department to decentralize the HR hire or update transaction processes out to line managers or human resource representatives in the field.

Prior to performing a Smart HR transaction, a template administrator must set up the templates. The administrator must be a person who is very familiar with the hiring process. When creating a template, the administrator is responsible for determining:

- Logical groups of fields, which will be the sections to include on the template.
- The sequence of sections and fields within sections.
- Default values for fields.
- Which fields will be hidden, display-only, or enterable.
- Whether data entered by the end user can be directly submitted for processing or will need to be reviewed by a human resource administrator.

Sections and fields used within templates are delivered as system data. These delivered sections can be modified within your templates to suit your organization's needs. These sections are located in the Template Section component **(Set Up HCM > Product Related > Workforce Administration > Smart HR Template > Smart HR Template Section** A list of delivered Smart HR template sections are located in the Setting Up the Administer Workforce Business Process, Setting Up Smart HR Templates topic in this documentation.

The labels of the fields on the template sections typically reflect the actual field labels. However, the template administrator can create a text catalog entry for those fields in which they want to change the label.

When the templates are created, the template administrator will assign a transaction type and category to each template. These are used for row-level security of the template. This security will restrict end user access to the template. Also, PeopleTools permission lists and roles are used for security purposes.

When templates are similar, the template administrator can clone an existing template to eliminate duplicate entry.

See Setting Up Smart HR Templates.

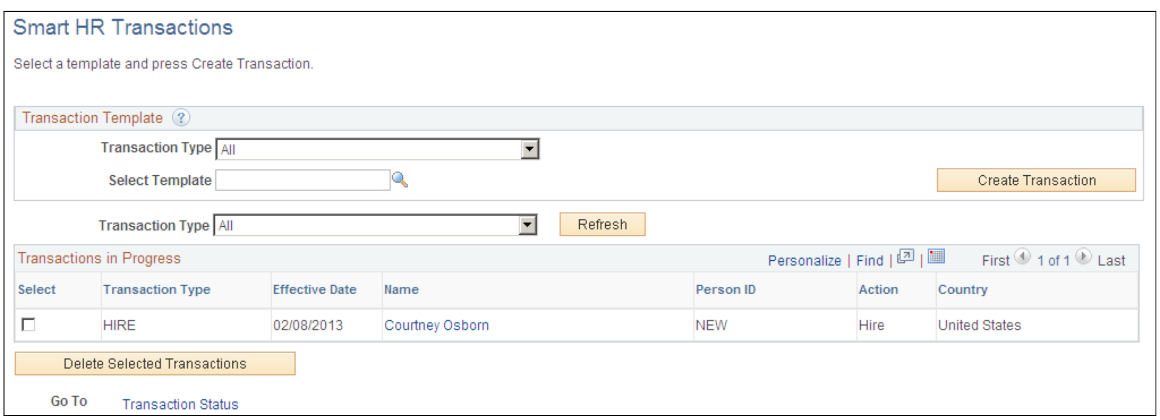
Smart HR Transactions Page

Use the Smart HR Transactions page (HR_TBH_EULIST) to select a template or person to process a Smart HR transaction.

Navigation:

- **Workforce Administration** > **Smart HR Template** > **Smart HR Transactions** > **Smart HR Transactions**
- **Manager Self Service** > **Job and Personal Information** > **Smart HR Template** > **Smart HR for Managers** > **Smart HR Transactions**

This example illustrates the fields and controls on the Smart HR Transactions page. You can find definitions for the fields and controls later on this page.



Start or complete a Smart HR transaction. Click the **Transaction Status** link at the bottom of the page to access the Transaction Status page and view transactions pending HR processing, have been cancelled by HR, or people who have had Smart HR transactions performed in the system.

Transaction Template

Select a template and click the **Create Transaction** button to start a transaction using the Smart HR process. The templates available for selection are those set up by the template administrator. You can narrow the search for a template by selecting a transaction type prior to searching for a template. Transaction types define if a transaction template is for a hire or rehire, a job update, a job and person data update, a profile update, and so on.

Transactions in Progress

Displays the transactions that are in *Draft* status. You can only view those people you have added through the Smart HR Transactions or Smart HR for Managers pages but selected to save for later. The person will remain in *Draft* status until you submit the person, send them to HR for completion, or delete them by selecting the row and clicking the **Delete Selected Transactions** button.

Related Links

Setting Up Smart HR Templates

Enter Transaction Details Page

Use the Enter Transaction Details page (HR_TBH_ADD) to enter transaction details, such as the persons's job effective date, to start the Smart HR transaction process for a person.

Navigation:

- Select a template from the **Select Template** field on the Smart HR Transactions page and click **Create Transaction.**
- Select a name link from the **Name** field on the Smart HR Transactions page.

This example illustrates the fields and controls on the Enter Transaction Details page. You can find definitions for the fields and controls later on this page.

Note: The fields you view or update vary depending on the template set up.

Enter transaction details to start the transaction process. Once the values on this page are entered, click **Continue** to access the Enter Transaction Information page.

Possible fields that may be visible or editable are **Template ID, Organizational Relationship, Country, Category, EmplID, Job Effective Date, Action, Reason, Name Format,** and **Address Format.** See the Smart HR Template Creation - Smart HR Template Creation - Configuration Page, Search Page Configuration (Fields) topic for more information.

Field or Control	***Description***
Employee ID	(Hire/rehire transactions) The value of *NEW* may appear if it has been set as the default value in the template definition. If you are hiring an individual to the organization for the first time and no data resides in the system for the person, accept the default. An employee ID will be assigned when the transaction is submitted successfully and a person record is created. Otherwise, enter or look up the employee ID. For rehire transactions no row-level security exists, and all persons in the system are available for selection. This is also the case for managers using the Smart HR for Managers pages for rehiring a person, as the person may not have previously reported to that manager. (Non-hire transactions) For non-hire transactions, row-level security is implemented for HR administrators. Only the persons to whom the user has security access are available. A valid employee ID must be entered to move forward. For managers using a non-hire transaction, the **Find a Person** link appears instead of the Employee ID lookup field.
Find a Person	(Non-hire transactions) For a manager using the Smart HR Template for a non-hire transaction, a **Find Person** link appears instead of the **Employee ID** field. Clicking the link displays a list of employees who report to that manager. The manager must click the link to select the appropriate employee for the transaction from the list of direct reports. **Note:** Direct Reports UI determines which employees are available. See “Configuring Direct Reports Functionality” (Application Fundamentals). When you select the employee, the Enter Transaction Details page appears with the person’s ID as employee ID, and the **Employee ID** field is display only.

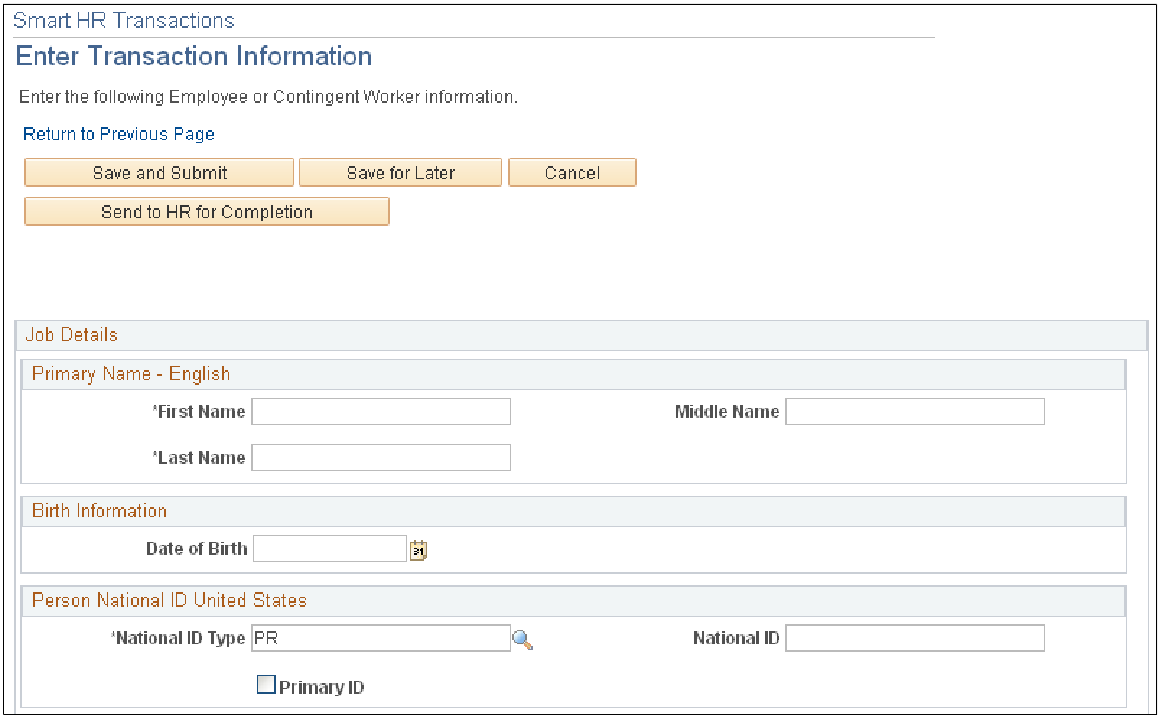
Enter Transaction Information Page

Use the Enter Transaction Information page (HR_TBH_DATA) to enter employee information details for the person’s transaction.

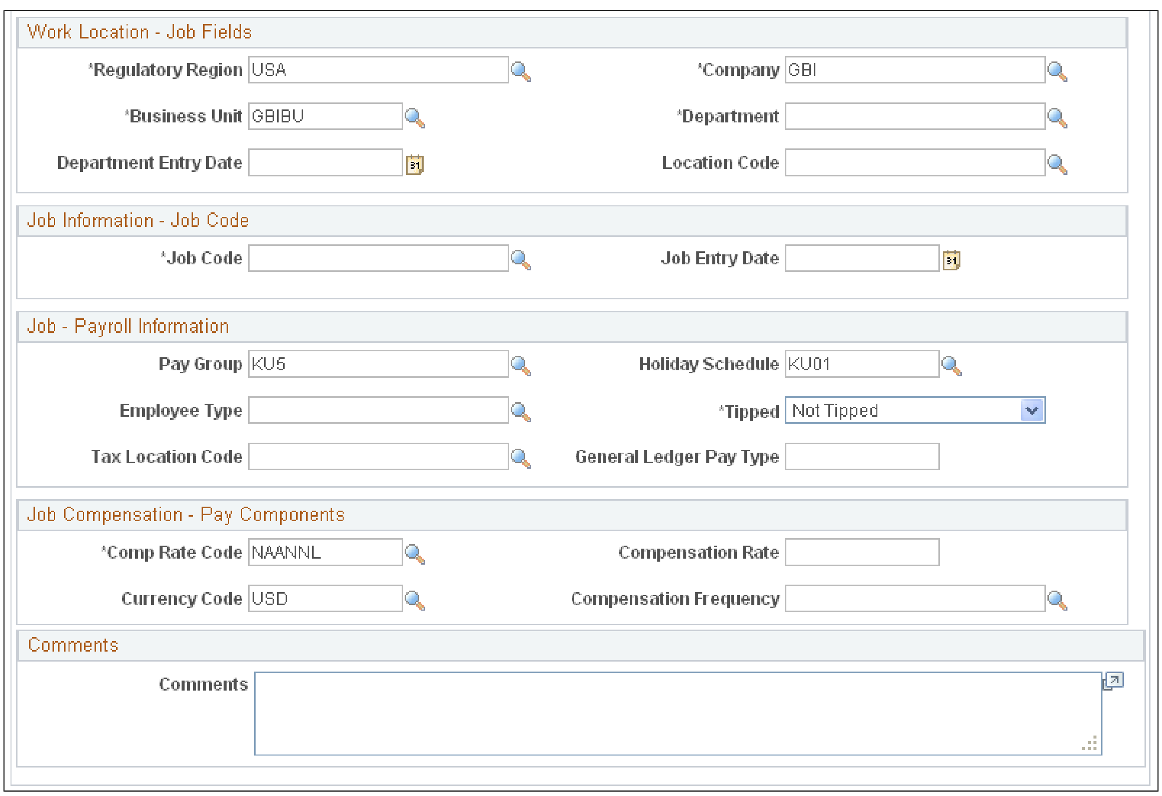
Navigation:

Click **Continue** on the Enter Transaction Details page.

This example illustrates an example of the Enter Transaction Information page (1 of 2). You can find definitions for the fields and controls later on this page, which varies according to the template you select.



This example illustrates an example of the Enter Transaction Information page (2 of 2). You can find definitions for the fields and controls later on this page, which varies according to the template you select.



Fields appear based on the template selected. Job data appears based on the EmplID selected.

Enter the employee's name, and enter or edit other required data. This data will be used complete the transaction.

See Understanding Job Data.

Completing a Smart HR Transaction

Once all data is entered, you may be presented with these options:

- **Save and Submit** – Click this button to save and submit the information for the person to the database.
  - If Search Match is enabled for this template, the system will run the Search/Match process and display the Person Match Found Page if a match is found.

    Note: For templates with a transaction type where the **Person/Job Data Indicator** field value is not equal to *Hire/Rehire,* the person must already be in the system.
    If no match is found, an error message appears stating that the personal information does not match a person in the system and to either edit the transaction details or send to HR for completion.

  - When the **Automatic Database Updates** check box is selected for the template and the transaction is saved successfully, the transaction updates the database and all information entered is updated in the appropriate tables. When ACA eligibility is associated with a hire template, the hire is saved successfully, and the regulatory region associated with the new employee is associated with the country code USA, then the transaction will update the system and HR will raise the *ACAEligibility* event.
  - When the **Automatic Database Updates** and the **Show Update Contracts Link** check boxes are selected on the template and the transaction is saved successfully, the system will display the **Update Contracts** link, which enables users with security permission to the contract pages to enter contract information for a person.
  - If **Automatic Database Updates** is not selected on the template definition (and no matching person was found for a hire or rehire template), the Submit Confirmation page will appear stating that the transaction is being forwarded to HR for further processing.
- **Save for Later** – Click this button to place the transaction in draft status. Depending on the security access granted the end user, he or she can access the person later to complete the transaction, or the transaction can be completed by the HR representative.
- **Submit to HR** for Completion – Click this button to submit the person's information to HR for review, completion, or submission by the HR administrator.
- **Cancel** – Click this button to return to the initial Smart HR Transaction page and no data is saved.

Note: The save options will vary depending on the template setup and the end user's security access. For example, if the end user is not allowed to save and submit data to the database, the template administrator will set up the template so all hires will have to be saved for later or submitted to HR for completion.

(USF) U.S. Federal Specific Considerations

Note: The PeopleSoft application delivers the *U.S. Federal Hire/Rehire* template transaction type for Federal users. Federal customers use the PAR processing components, where the personal data and job data are in the same component and both sets of data will always be updated from the template. Therefore, the application does not deliver a template transaction type for Federal users where the person job data indicator is set to update job only or update person only.

In cases of U.S. Federal implementations, when the end user selects **Save and Submit** for a transaction, the following will occur:

- When **Automatic Database Updates** is selected.

  The employee goes to the first step in the PAR approval process. The data is not sent directly to Personal Data and Job Data.

- When **Automatic Database Updates** is deselected.

  The request will go to the Manage Transactions page to await HR action. When the HR administrator saves the person (in the HR Processing USF component), the data will go to the first step in the PAR approval process, not directly to Personal Data and Job Data.

There are two exceptions to this rule:

1. When Federal customers add contingent workers they do not go through the PAR approval process, instead they go directly to Personal Data and Job Data.
2. If the template administrator defaults the **PAR Status** field to *Processed by Human Resources* when setting up the template, then the data will be sent on to Personal Data and Job Data as part of the processing Federal Hire component interface.

Related Links

Understanding Smart HR Templates

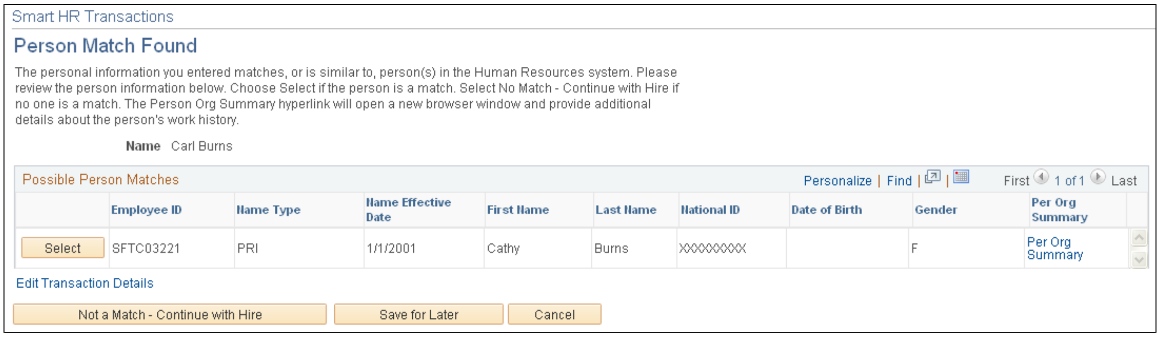
Person Match Found Page

Use the Person Match Found page (HR_TBH_SRMATCH) to complete a transaction when a person match is found. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the transaction.

Navigation:

Click **Save and Submit** on the Enter Transaction Information page.

This example illustrates the fields and controls on the Person Match Found page. You can find definitions for the fields and controls later on this page.



This page appears only if Search Match is enabled for the template and a match is found on the person involved in the transaction.

Field or Control	***Description***
Select	If a match is found, the end user can select one of the existing people to continue with the transaction. The system considers the following scenarios when processing the transaction: • If the matching person selected is currently active in the system, the request is automatically sent to an HR administrator to complete. • If the matching person selected is currently inactive in the system, the Select an Action Page will appear and you will be presented different options on how to proceed, depending upon how the template rules are set up. • When auto-update is enabled for a job data transaction and the person selected has no active job instances or more than one active job instance, the transaction is routed to an HR administrator to complete.
Per Org Summary	Click this link to open the Person Organizational Summary page in a new window to view more details about this person. This can be useful in deciding whether this transaction should be treated as a new hire, if this should be treated as a concurrent job for an existing person, or if this is a rehire or update of someone already in the database.
Not a Match - Continue with Hire	Click this button if none of the search results are a match. **Note:** This button is not available for non-hire or non-rehire transactions. These types of transactions require that a person be in the system.
Save for Later	Click this button to save this person in draft status and come back at a later time to decide whether the person is a match or not.

Field or Control	***Description***
Cancel	Click this button to cancel this process. You will lose all data previously entered and the system will return you to the initial Smart HR Transactions page.
Send to HR for Completion	Click this button to submit this transaction to HR for completion.
Enter Transaction Details	Select to have the system return you to the Enter Transaction Details page of the Smart HR template and view or modify your data.

See Adding and Reviewing Organizational Relationships.

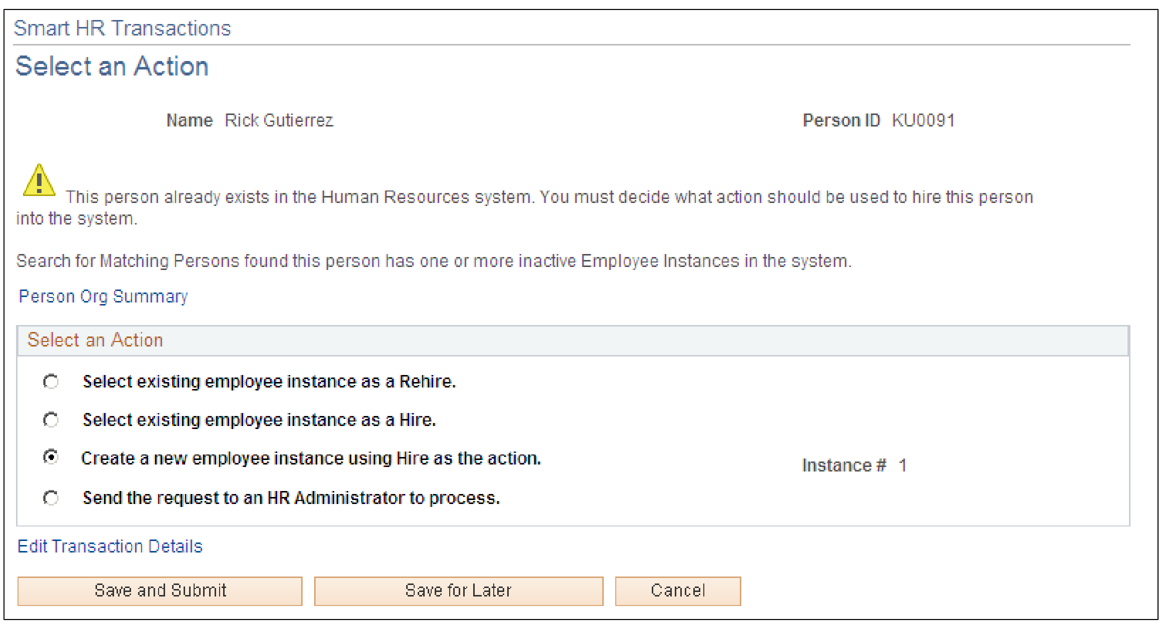
Select an Action Page

Use the Select an Action page (HR_TBH_ACTION) to select an action if a matching person is found in the database.

Navigation:

Click the **Select** button on the Person Match Found page (for a person with an inactive status).

This example illustrates the fields and controls on the Select an Action page. You can find definitions for the fields and controls later on this page.



This page is only available for templates with a transaction type where the **Person/Job Data Indicator** field value is equal to *Hire/Rehire*.

Note: The options on this page vary depending upon how the rules are set up for the template on the Smart HR Template Creation - Person Rules Page.

Search Match for Hire or Rehire Transactions

When no active organizational instance is found and the template administrator has set up the template to enable the end user to decide what action to take, options may include:

- **Select existing employee instance as a Rehire** or **Select existing employee instance as a Hire.**

  The system will default to the lowest employment instance. The end user has the option to select a different employee instance, if applicable. When an employee instance is selected, the system always defaults to the controlling instance employee record number behind the scenes.

- **Create a new employee instance using Hire as the action.**

  The action will always default to *HIR* (Hire) for employee templates and *ADD* (Add Contingent Worker) for contingent worker templates. The employee instance and employee record number is automatically calculated behind the scenes.

- Send the request to an HR Administrator to process.

When the end user does not get to decide what action to take, the template administrator must decide at the template level the options to take.

If only one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator must decide between the following actions:

- **Restart Employment Instance as a Rehire.**
- **Restart Employment Instance as a Hire.**
- **Create a New Employment Instance using Hire as the Action.**
- **Send the Request to an HR Administrator to Process.**

When more than one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator can chose from with of these option to have the system perform:

- **Create a New Employment Instance using Hire as the Action.**
- **Send the request to an HR Administrator to process.**

Note: When an active person is selected from the search results, the hire request will always be sent to HR to complete the process.

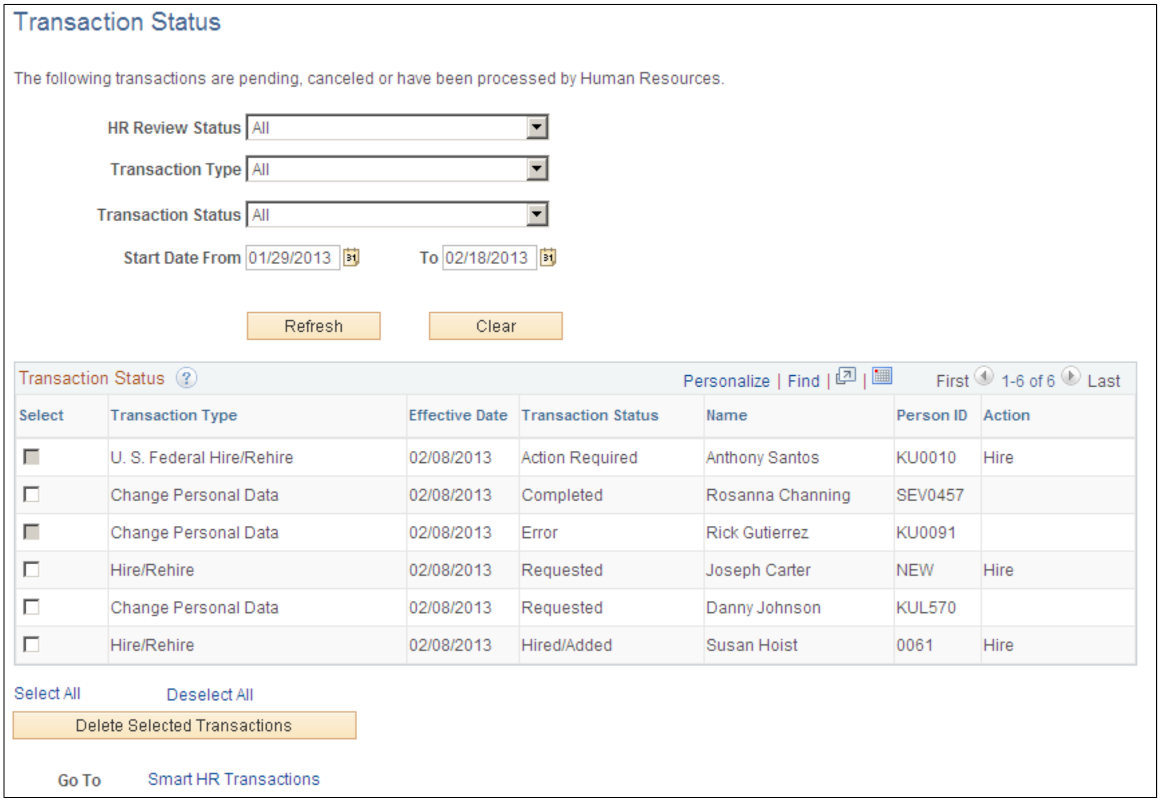
Transaction Status Page

Use the Transaction Status page (HR_TBH_STATUS) to view the status of a Smart HR transaction with a pending, cancelled, or processed HR review status.

Navigation:

- **Workforce Administration** > **Smart HR Template** > **Smart HR Transaction Status** > **Transaction Status**
- Click the **Transaction Status** link on the Smart HR Transactions page.

This example illustrates the fields and controls on the Transaction Status page. You can find definitions for the fields and controls later on this page.



View the status of Smart HR Template transactions. The end user will be able to view only the persons he or she have entered in the system.

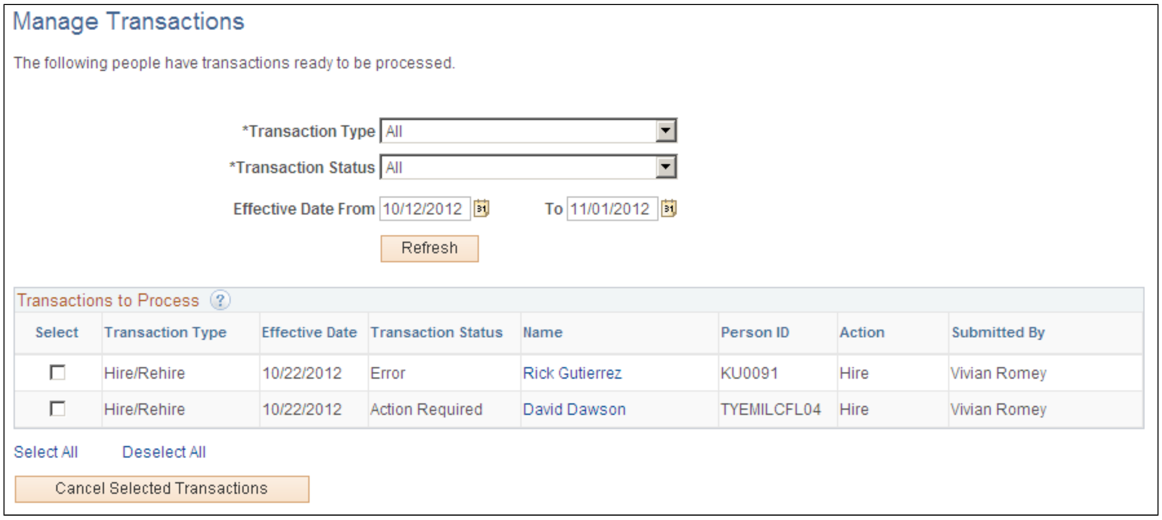
Manage Transactions Page

Use the Manage Transactions page (HR_TBH_MANAGE_TXN) to view the Smart HR transactions that are either in draft status, require HR review prior to committing to the database, encountered errors upon saving and require a HR administrator's review to complete the transaction, or to display a list showing all transactions with these statuses.

Navigation:

Workforce Administration > **Smart HR Template** > **Manage Smart HR Transactions** > **Manage Transactions**

This example illustrates the fields and controls on the Manage Transactions page. You can find definitions for the fields and controls later on this page.



The page will display, by default, all transactions with the previously mentioned statuses with effective dates in the previous 10 days as well as next 10 days. Use the **Transaction Type** and **Effective Date From** and **To** fields to narrow your search for a transaction.

When a Smart HR template for a transaction does not allow automatic database updates by the user, the transactions are available on this page with the status of *Requested*.

To review, update, and save a transaction to the HR system, select a person's name link in the **Transactions to Process** grid. This will open the Manage Transaction Details page to enable you to complete the transaction.

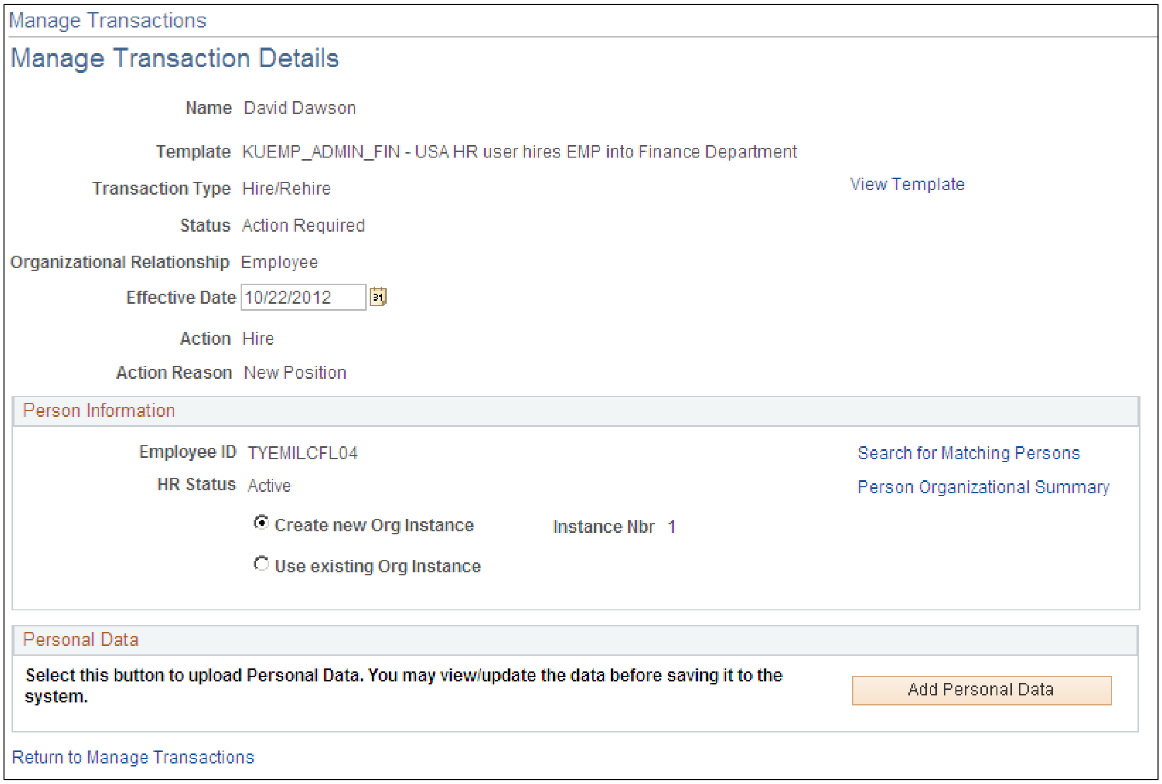
Manage Transaction Details Page

Use the Manage Transaction Details page (HR_TBH_HIREDET) to view details entered during a Smart HR transaction and complete the process.

Navigation:

Click the name link for a person on the Manage Transactions page.

This example illustrates the fields and controls on the Manage Transaction Details page. You can find definitions for the fields and controls later on this page.



Use this page to change the transaction date, perform a search for matching persons, or select the appropriate buttons or links to complete the Smart HR transaction.

This table lists some examples of some of the buttons and links that are available based on status:

Status	***Available Button or Link***	***Description***
Requested	Open Template Add Person (button)	Automatic updates is off. The person has not been added to the system.
Requested	View/Edit Person (link) Add Job (button)	Automatic updates is off. Personal information has been added to Personal Data. The person still needs to be added to Job Data.
Requested	Add Profile (button)	Automatic updates is off. The profile data has not been added to the system.

Status	***Available Button or Link***	***Description***
Draft	View/Edit Job Data (link) Add Profile Data (button)	Job information has been added to Job Data. The profile data still needs to be added to Person Profile.
Action Required	Add Person (button)	Automatic updates is on. This person was submitted to HR for completion.
Action Required	View/Edit Person (link) Add Job (button)	Automatic updates is on. This person was submitted to HR for completion and personal data has been added. The job information has not been added.
Action Required	View/Edit Person (link) View/Edit Job (link) Update Profile Data (button)	Automatic updates is on. Personal data and job data has been updated. The profile information has not been added.
Error	View Errors (link) Add Person (button)	Automatic updates is on. An error occurred when attempting to save the record to Personal Data.
Error	View Errors (link) Add Person (button) Add Job (button)	Automatic updates is on. The person has been added to Personal Data. An error occurred when attempting to save the record to Job.

Note: (USF) When the database is federalized, only the **Add Person/Job** appears, which will update HR Processing USF. Depending on the PAR Status, Personal Data and Job Data may also be automatically updated. For example, if the PAR Status is *Processed* on the template, Personal Data and Job Data will be automatically updated when the **Add Person/Job** button is selected and the information is saved. However, if the PAR Status is *Requested* on the template, only the HR Processing USF page will be updated and the request will need to go through the standard PAR approval process. If applicable, U.S. Federal customers will also see the **View Errors** button on the Manage Transaction Details Page.

Field or Control	Description
View Template	Select this link to view the entire template for this transaction. This link is available when some of the core components have been updated for a transaction and therefore the **Open Template** button is now longer available on the page. This link opens the template transaction in view mode. In order to update a core component, use the other buttons and links located later on the page.
View Errors	Click this link to open the Manage Transaction Details - Transaction Errors Detail page that displays error details and messages.

Person Information

Field or Control	Description
Search for Matching Persons	Select this link to see if there are matching persons in the system.
Person Organizational Summary	Select this link to open the Person Organizational Summary page if a person ID exists.

When the person has all inactive records, determine whether to create a new organizational instance when the record is added to Job or to use an existing organizational instance.

When a person has one or more active records in the system, the system enables you to create a new assignment.

Field or Control	Description
Create new Org Instance (create new organizational instance) and **Instance Nbr** (instance number)	Select to create a new organizational instance for a person. The system provides the next available instance number by default. These fields are available for the *HIR* and *ADD* job actions.
Use existing Org Instance and **Instance Nbr**	Select to specify the organizational instance and number that should be used to add a job for a person in the system. When a person exists in the system and you select to use an existing organizational instance, the page displays the **Use Existing Assignment** and **Create New Assignment** fields. Select from the available values in the **Instance Nbr** field. These fields are available for the *HIR, REH, ADD,* and *RNW* job actions.

When you select to use an existing org instance, you are presented with the following options:

Field or Control	***Description***
Use Existing Assignment, Empl Record, and **Action**	Select to use an employee assignment that already exists in the system. Select from the available employment record numbers and actions. These fields are available for the *HIR, REH, ADD,* and *RNW* job actions.
Create New Assignment and **Empl Record**	Select to have the system create a new assignment for the hire of a person that already has a job record in the system. The system provides the next available employment record number by default. These fields are available for the *HIR* and *ADD* job actions.

Complete Transaction

Field or Control	***Description***
Open Template	Select this button to access the Manage Transaction component and view the template transaction pages in its entirety. This enables you to view, modify, and complete all details and sections of the template. This button is only visible when none of the template data has been saved in any of the transaction's core components. When a portion of the transaction has been completed, such as updates to Personal Data, the **Open Template** button is hidden. Use the other group boxes on the page to access the appropriate core component and add content. When the **Open Template** button is hidden, the **View Template** link appears near the top of the page. You can use this link to view the template in its entirety, but the view is display only.

Additional Group Boxes that May Appear on the Page

The page may display various other group boxes depending on what data is being added or updated in the system. The template transaction type associated with the template defines which components will be updated during the transaction process. Each component will be associated with a different group box on this page. Some group boxes may not appear until after another task has been completed. For example, if you are hiring a person, you must add personal data before adding job data. Therefore the page will display the Add Personal Data button but not the Add Job Data button until after you have completed the personal data content. See Smart HR Transaction Type - Components Page

The group boxes, field labels, buttons, and link text for this section will vary and are defined on the Template Transaction Type - Transaction Component Details Page.

Select the appropriate link to view additional information specific to a component.

Select the appropriate button to open either the Personal Data, Job Data, or Personal Profile pages and view and update the corresponding data.

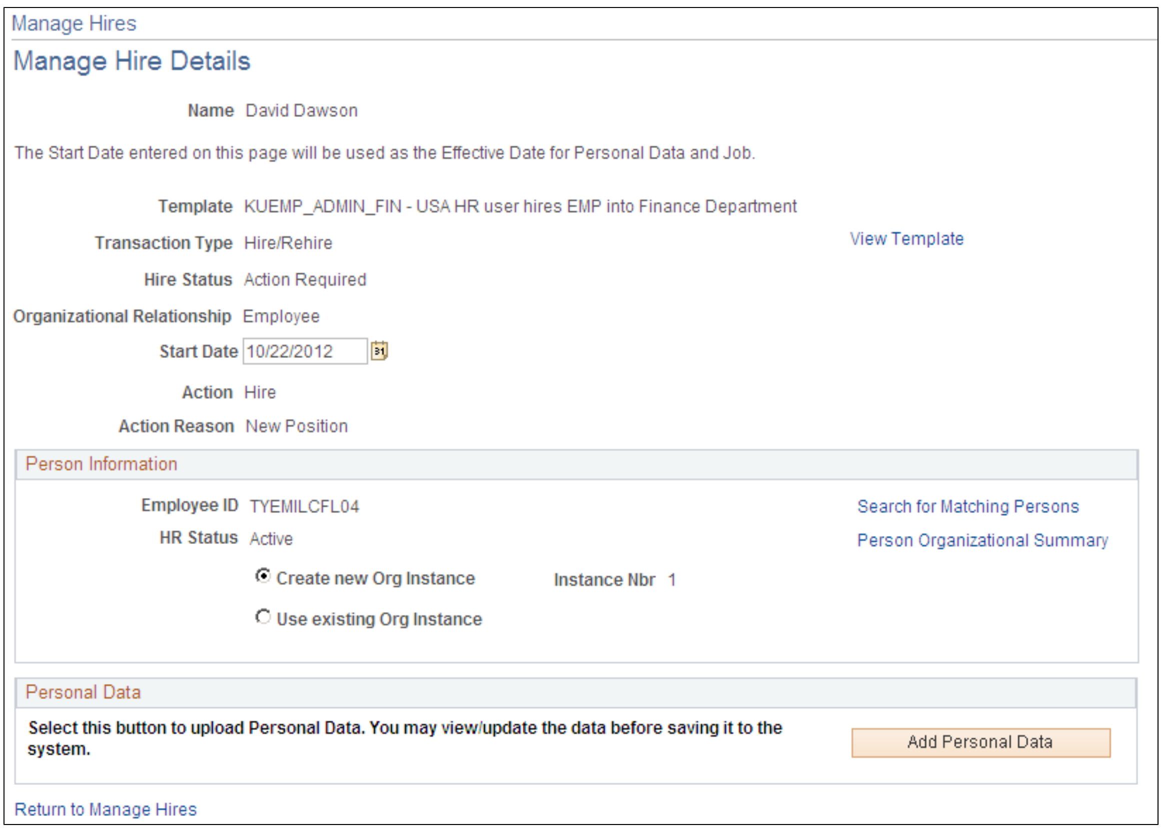
Manage Hire Details Page

Use the Manage Hire Details page (HR_TBH_HIREDET) to view job details entered during a Smart HR hire and complete the hire process.

Navigation:

Click the name link for a person whose **Source** value is *Smart HR Transactions* on the Manage Hires page.

This example illustrates the fields and controls on the Manage Hire Details page. You can find definitions for the fields and controls later on this page.



Use this page to change the start date, perform a search for matching persons, or select the appropriate buttons or links to complete the transaction.

Note: The system displays this page slightly different for *Smart HR Transactions* source type than it does for the *Recruiting* source type. The Manage Hire Details page for a *Smart HR Transactions* hire displays the buttons and links in the various sections that are come upon the Smart HR transaction template. This page works like the Manage Transaction Details Page.

For more information on the fields on this page, see Manage Hires Detail Page.

(BRA) Running Brazil Employment Reports

These topics provide overviews of the CAGED report and employee registration and discuss running the Brazilian employment reports.

Pages Used to Run Brazil Employment Reports

Page Name	***Definition Name***	***Usage***
CAGED File/Report BRA Page	CAGED_RC_BRA	Generate CAGED reports.
Employee Registry Report BRA Page	EMPL_REG_RC_BRA	Generate employee registry reports.

Understanding the CAGED Report

The Cadastro Geral de Empregados e Desempregados – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employees who have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. Keep the flat file as a record.

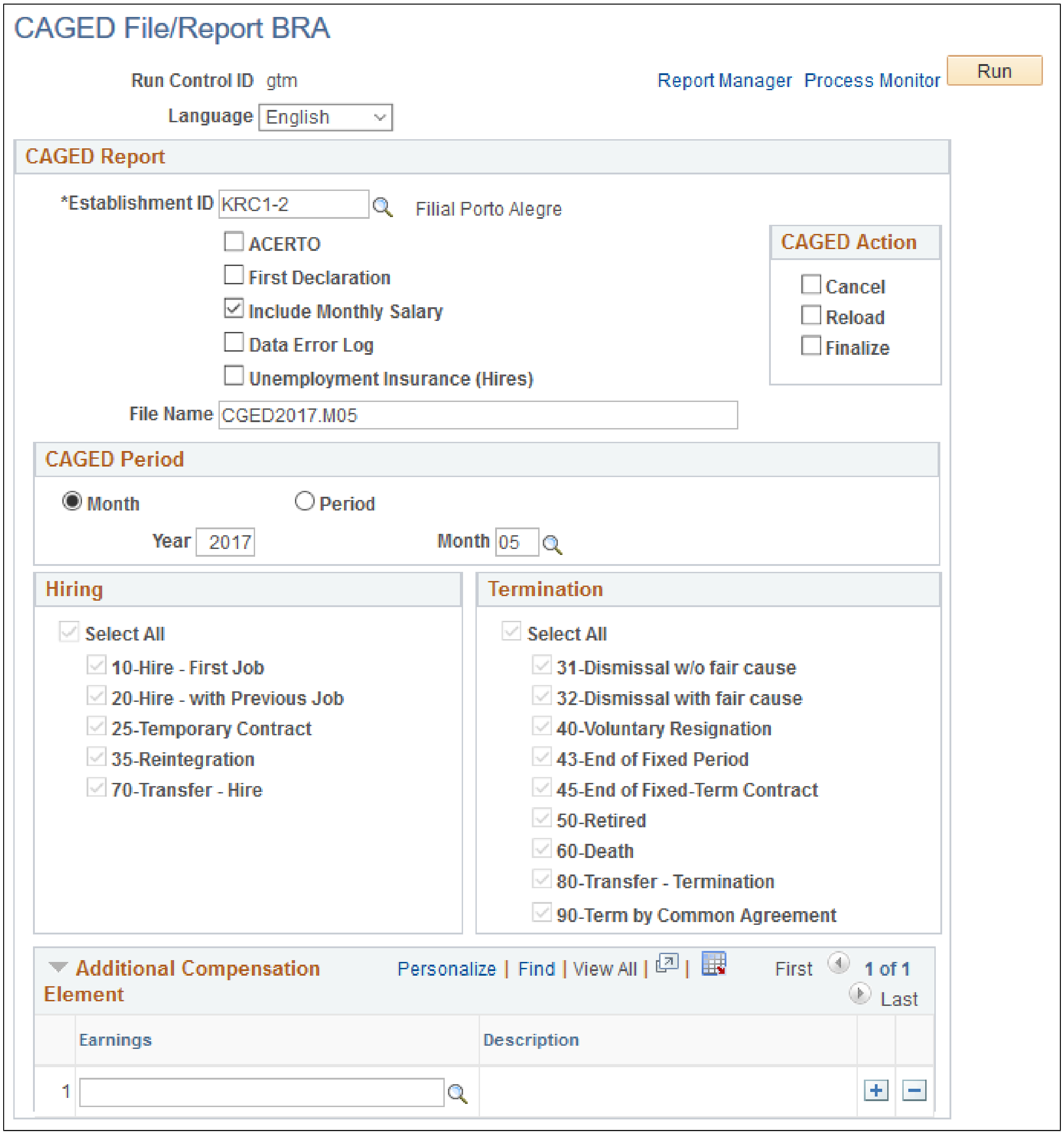
CAGED File/Report BRA Page

Use the CAGED File/Report BRA page (CAGED_RC_BRA) to generate CAGED reports.

Navigation:

Workforce Monitoring > **Meet Regulatory Rqmts BRA** > **CAGED File/Report BRA** > **CAGED File/Report BRA**

This example illustrates the fields and controls on the CAGED File/Report BRA page. You can find definitions for the fields and controls later on this page.



Run the BRCGED01 process to generate the CAGED report.

Field or Control	***Description***
Establishment ID	Specify the establishment for which the report runs.
ACERTO	Select to run the process with this option only if there is a previous regular process from the selected establishment and dates.

Field or Control	*Description*
First Declaration	Select to indicate that this is the first statement that the establishment is sending to CAGED.
Include Monthly Salary	Select to include monthly salary in the report.
Data Error Log	Select to generate an error log for the report if applicable.
Unemployment Insurance (Hires)	Select to include in the report only hiring and rehiring movements of employees who receive unemployment benefits.

CAGED Action

The system supports only one current, running process for each establishment. To run a new process for an establishment, you need to either cancel or finalize the current one first.

Field or Control	*Description*
Cancel	Select to cancel a generated CAGED process of the selected establishment.
Reload	Select to regenerate an existing process.
Finalize	Select to finalize an existing process after the corresponding file has been sent to CAGED. Movements included in a finalized process are not going to be generated in another process.

CAGED Period

Select to run the CAGED report for a given month, or a period within a month.

If *Month* is selected, specify a year and month for the report.

If *Period* is selected, specify the start and end dates for the report. The dates must belong in the same year and month.

Hiring

Select the types (classified by CAGED action reason) of hiring to be included in the report. All of the listed action reasons are selected by default.

The system deselects the *70-Transfer - Hire* action reason if the **Unemployment Insurance (Hires)** option is selected.

Termination

Select the types (classified by CAGED action reason) of terminations to be included in the report. All of the listed action reasons are selected by default.

The system deselects all action reasons if the **Unemployment Insurance (Hires)** option is selected.

Additional Compensation Element

If you use PeopleSoft Global Payroll, enter earning components other than salary to report to CAGED.

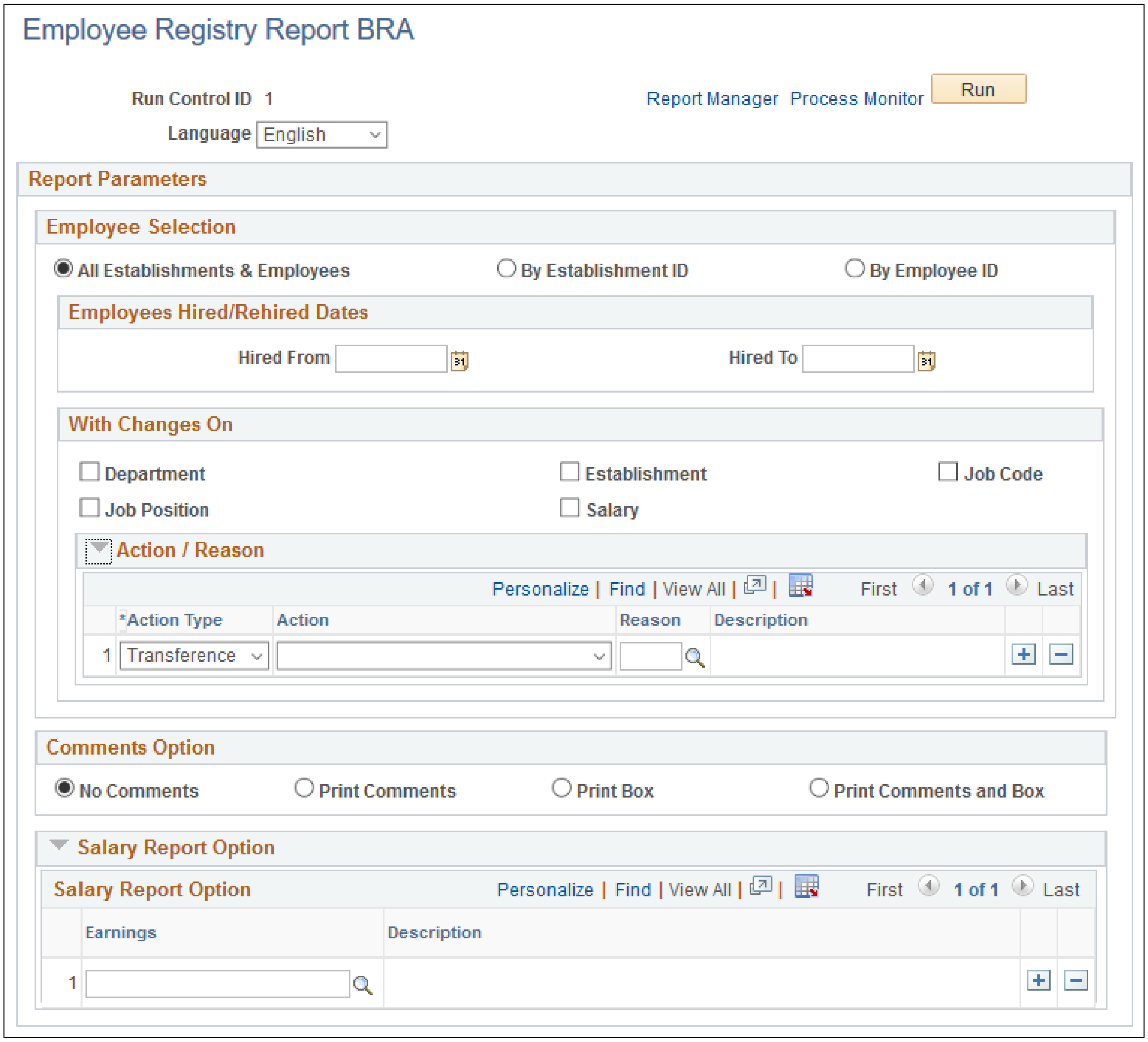
Employee Registry Report BRA Page

Use the Employee Registry Report BRA page (EMPL_REG_RC_BRA) to generate employee registry reports.

Navigation:

Workforce Monitoring > **Meet Regulatory Rqmts BRA** > **Employee Registry Report BRA** > **Employee Registry Report BRA**

This example illustrates the fields and controls on the Employee Registry Report BRA page. You can find definitions for the fields and controls later on this page.



Run the BREREG01 process to generate the Employee Registry report.

Employee Selection

Field or Control	***Description***
Employee Selection	Select whether you want the report to include all employees and establishments or to include only a particular establishment or employee. If you select the **By Establishment ID** option, the **Establishment ID** and **Department** fields appear. If you select the **By Employee ID** option, the **Selected Employees** section appears, which contains the **Empl ID** and **Empl Record** fields.

Field or Control	*Description*
Establishment ID, Department, Empl ID, and **Empl Record**	Use these fields to restrict the number of employees for whom you generate an employee registry report.

Employees Hired/Rehired Dates

Field or Control	*Description*
Hired From and **Hired To**	Select the beginning and ending dates for the period for which you want to generate the Employee Registry report.

With Changes On

This group box appears when you select either the **All Establishments & Employees** or **By Establishment ID** option.

Field or Control	*Description*
Action and **Reason**	Enter an action and reason to generate employee registry reports only for employees with the specified action reason.

Comments Option

Select whether the report should not include comments or if it should print comments, print box, or print comments and box.

Salary Report Option

If you use PeopleSoft Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report.

(CAN) Running the Canadian Hire List Report

This topic lists the page used to run the Canadian Hire List report.

Page Used to Run the Canadian Hire List Report

Page Name	***Definition Name***	***Usage***
Hire Report CAN Page	RUNCTL_FROMTHRU	Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge or payroll numbers that are within the date range that is provided.

(NLD) Running the First Day Notification

These topics discuss how to:

Pages Used to Set Up and Generate First Day Notifications

Page Name	***Definition Name***	***Usage***
Setup First Day Report NLD Page	EDM_TXR_NLD	For each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications.
First Day Notification Page	RUNCTL_EDM_NLD	Use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees. You can also adjust the list of hires and rehires before you run the report.
Notification Results Page	EDM_RSLT_NLD	View details of First Day Notifications that were previously generated using the First Day Notification NLD process.

Understanding First Day Notifications

In the Netherlands, employers send First Day Notifications (Eerstedagsmelding [EDM]) to notify the Tax Authority when they hire or rehire employees.

Administer Workforce provides the First Day Notification NLD Application Engine process (HR_EDM_NLD) to generate the notifications. The run control page for the process enables you to search for employees who have been hired or rehired within a given period. You can review and adjust the list of employees before running the process, which creates XML files for transmission to the Dutch Tax Authority. You can view details of the First Day Notifications that have been generated using the Notification Results page.

Before you create First Day Notifications, use the Setup First Day Report NLD component (HR_SETUP_EDM_NLD) to define information required for each company.

Setup First Day Report NLD Page

Use the Setup First Day Report NLD page (EDM_TXR_NLD) to for each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Setup First Day Report NLD** > **Setup First Day Report NLD**

This example illustrates the fields and controls on the Setup First Day Report NLD page. You can find definitions for the fields and controls later on this page.

Field or Control	*Description*
Federal Employer Tax ID	Displays the company's employer tax ID that is specified on the Company — Default Settings page. See “Default Settings Page” (Application Fundamentals).
Tax Number Suffix	Enter the tax number suffix to use for the first day notification. When you run the first day notification, the system combines the tax number suffix and the federal employer tax ID to create the employer ID that is included in the first day notification. The default suffix is *L01*. If you want to use additional suffixes, name them *L02, L03,* and so on.

Exclude Employee Classes

Use this scroll area to define the classes of employees who are not included in first day notifications. Typically, temporary employees who are employed by an agency (uitzendkrachten) are not included in first day notifications, but your organization may have other classes of employees that are excluded from reporting.

Field or Control	Description
Employee Classification	Select the employee classes that you want to exclude from reporting. Employee classes are defined by setID on the Employee Class page and assigned to employees on the Job Data - Job Information page.

First Day Notification Page

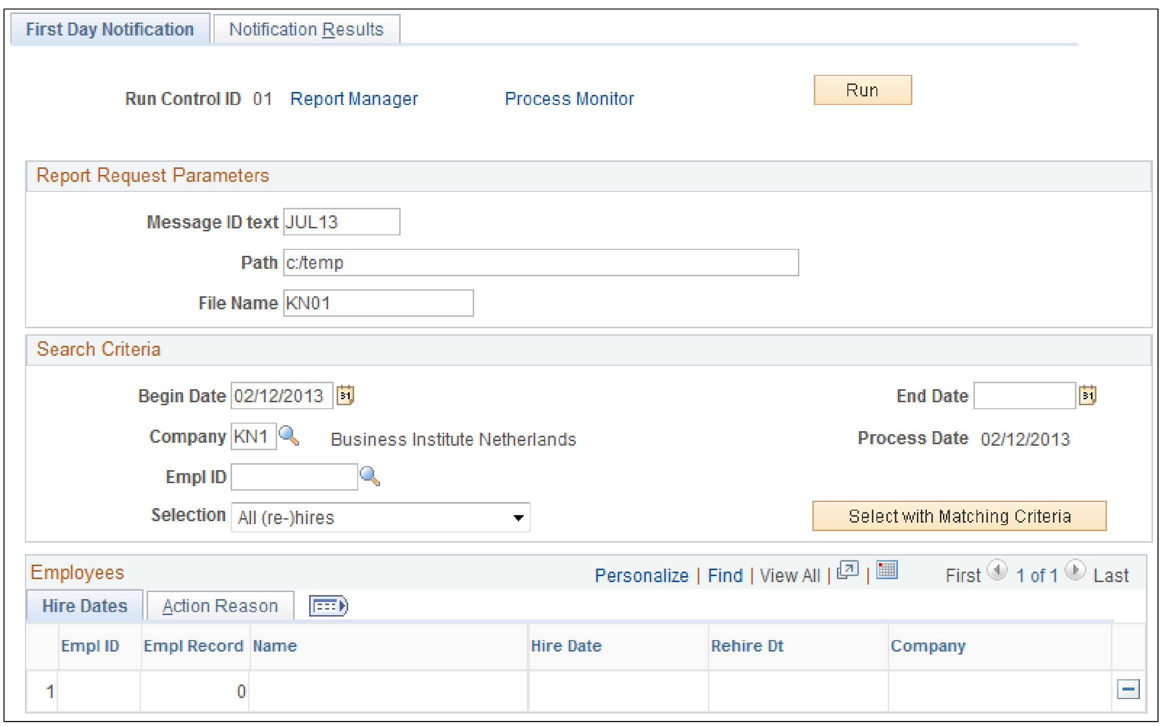
Use the First Day Notification page (RUNCTL_EDM_NLD) to use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees.

You can also adjust the list of hires and rehires before you run the report.

Navigation:

Workforce Administration > **Workforce Reports** > **First Day Notification NLD** > **First Day Notification**

This example illustrates the fields and controls on the First Day Notification page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Message ID text	Enter free format text that is combined with the company's federal employer tax ID and the tax number suffix to form the message ID in the XML file. Use the First Day Report Setup page to define the tax number suffix to use.
Path	Enter the location of the XML file that is created by the First Day Notification NLD process. Enter an absolute path name, such as c:/temp/, or a relative path such as \\machinename \temp.
File Name	Enter the name of the XML file that is created by the First Day Notification NLD process. The process generates files with file names that combine the file name you enter here with the employee ID and employee record number.

Search Criteria

Use this group box to specify the search criteria for the First Day Notification.

Field or Control	*Description*
Begin Date and **End Date**	Enter the dates for the reporting period. The system searches for hires and rehires that occurred within this period.
Company and **Empl ID** (employee ID)	Select a company to search for hires and rehires within that company, or select an employee if you want to run the report for a specific person. Leave this field blank to run the report for all companies.
Selection	Select one of these values: *New (re-)hires:* To include only those hires and rehires that have not been previously reported. *All (re-)hires:* To include all hires and rehires that occurred in the period defined by the begin and end dates. Use this option if you want to rerun the notification for a period. For example if you have changed employee data and you need to recreate the notification, use this option to run the report.
Select with Matching Criteria	Click this button to search for employees who match the criteria you entered in the Search Criteria group box. The system displays matching employees in the Employees scroll area.

Employees

This scroll area lists the employees who matched the search criteria that you specified. Review the employee details and delete any employees you don't want to include in the report. When you click the Run button to run the First Day Notification NLD process, the system generates a notification for the employees that are listed in the scroll area.

Note: The system includes employees whose Regulatory Region is *NLD* only. Employees' regulatory region is defined on the Job Data - Work Location page.

Field or Control	***Description***
Hire Date and **Rehire Dt** (rehire date)	Displays the employee's hire or rehire date.
Action and **Reason Code**	Displays the action and reason code that were used for the hire or rehire. The system includes employees with the HIR (hire) action or REH (rehire) action codes only.
Empl Class (employee class)	Displays the employee class that is assigned to the employee on the Job Data - Job Information page.

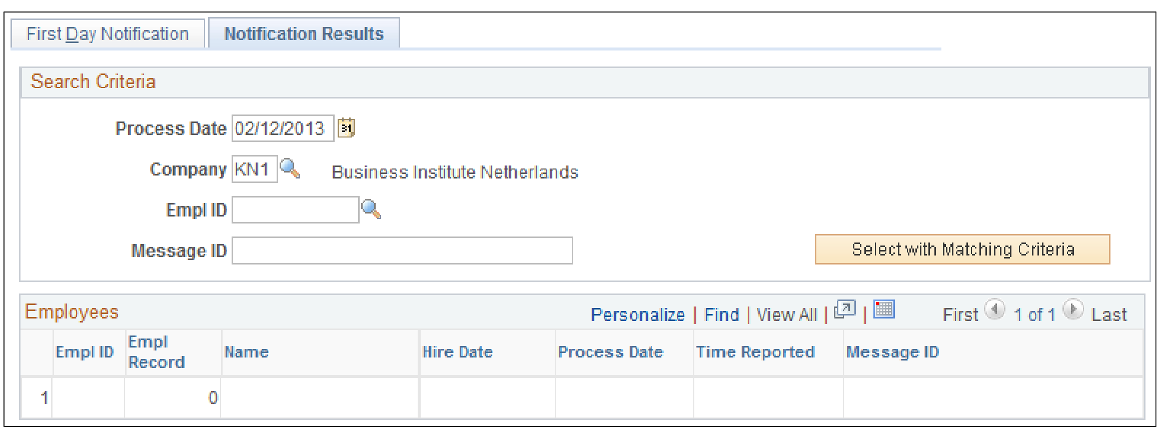
Notification Results Page

Use the Notification Results page (EDM_RSLT_NLD) to view details of First Day Notifications that were previously generated using the First Day Notification NLD process.

Navigation:

Workforce Administration > **Workforce Reports** > **First Day Notification NLD** > **Notification Results**

This example illustrates the fields and controls on the Notification Results page. You can find definitions for the fields and controls later on this page.



Search Criteria

Field or Control	***Description***
Process Date	Enter a process date if you want to view details of the First Day Notifications generated on a given date.
Company	Select a company to view details of the First Day Notifications that have been generated for employees in that company.
Empl ID	Select an employee ID to view details of that person's First Day Notification.
Message ID	Enter a message ID if you want to view the employees who were included in a specific message ID.
Select with Matching Criteria	Click this button to search for employees whose First Day Notifications match the criteria you entered in the Search Criteria group box.

Employees

This scroll area lists the employees whose First Day Notifications match the search criteria.

Field or Control	***Description***
Hire Date	Displays the employee's hire or rehire date.
Time Reported	Displays the time that the notification was generated.
Message ID	Displays the message ID. This is generated by the First Day Notification process by combining the message ID text you specified on the First Day Notification page, the company's employer tax ID, the tax number suffix, and the employee ID.

Chapter 10

Updating Person and Job Information

Understanding the Process of Updating Person and Job Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, enter these changes regularly in PeopleSoft Human Resources.

Updating Job Information When You've Implemented PeopleSoft Payroll for North America

When you modify job data that affects payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating Job Information When You've Implemented PeopleSoft Benefits Administration

When you modify job or employment data that affects benefits, the system sets the flags that control event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Locating Personnel Records

The first time that you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's ID, use the page to search for the correct record by name, partial last name, alternate character name, department, set ID, or employment status. If you prefer, use the Search By National ID page to find a person's record by using a national ID.

Changing Personal Data

To update personal information without changing job information, use the Update Person Detail component (PERSONAL_DATA) in classic and Modify Person Tile and pages (PERSONAL_DATA_FL) in fluid. These contain the same pages that you use to add personal data records with the exception of the Organizational Relationship page you will find the classic pages:

Component	***Pages in the Group***	***Usage***
(Classic) Personal Data • **Workforce Administration** > **Personal Information** > **Modify a Person** • **Workforce Administration** > **Personal Information** > **Biographical** > **Update Person Detail** • **Stock** > **Modify a Person** • **Administer Training** > **Modify a Person**	Biographical Details (PERSONAL_DATA1) Contact Information (PERSONAL_DATA2) Regional (PERSONAL_DATA3)	Update a person's personal information without changing job information using classic.
(Fluid) **Workforce Administrator tile** > **Manage Human Resources tile** > **Modify Person tile** > **Person Data**	Person Data (PERSONAL_DATA_FL)	Update a person's personal information without changing job information using fluid. This page contains sections to update biographical details, contact information, and regional information.

Related Links

Updating Personal Data

(Classic) Adding a Person

(Fluid) Adding a Person

Updating Personal Data

Use the Modify a Person component in classic and Modify Person tile in fluid to update a person's name, address, phone numbers, marital status, education, and other personal information.

These topics provide an overview of types of personal data, using workflow to update person addresses, and discuss how to update personal data.

Related Links

Changing Personal Data

(Classic) Pages Used to Update Personal Data

These contain the same pages that you use to add personal data records with the exception of the Organizational Relationship page in classic.

Note: The Classic Person Data and Job Data components have been replaced by functionality in Fluid. For more information, see (Fluid) Updating Job Data and (Fluid) Pages Used to Update Personal Data.

Page Name	***Definition Name***	***Usage***
Biographical Details Page	PERSONAL_DATA1	Update a person's personal information.
Add a Person or Modify a Person - Contact Information Page	PERSONAL_DATA2	Update a person's name, address, phone, and email information.
Add a Person or Modify a Person - Regional Page	PERSONAL_DATA3	Maintain regionally-required information about a person.
Veteran Status Page	HR_VETERAN_STATUS	Employees use this self-service page to enter and update self-identification veteran information. When the employee submits the Veteran Status page, the system displays the veteran self-identify data in the Veteran group box on the Regional page in the Personal Information – Add a Person or Modify a Person component. Administrators can update the selection on the Regional page.
Emergency Contact - Contact Address/ Phone Page	EMERGENCY_CONTACT	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.

Related Links

(Classic) Adding a Person

(Fluid) Pages Used to Update Personal Data

Use the Modify Person Tile in fluid to make updates to personal data for a person in the system. The Person Data page appears within the context of an Activity Guide Composer process and uses sections to manage certain types of information.

These contain the same pages that you use to add personal data records.

The following videos provide an overview and demonstration of how to use the fluid Person Data modification feature:

Video: Image Highlights, PeopleSoft HCM Update Image 47: Person Data Modernization

Video: Person Data Modernization

See also Understanding the Activity Guide Composer Framework for Person and Organizational Relationship Components in Fluid.

Page and Section Name	***Definition Name***	***Usage***
Modify Person Tile	HC_HR_PERS_MODIFY_FL_GBL (this is the cref for the tile)	Update an existing Person Data record in fluid.
Person Data Page	PERSONAL_DATA_FL	Update personal details, contact information, and regional information about a person in fluid.
Person Data Page - Person Details Section	N/A (See the Person Data page)	Update a person's personal information.
Person Data Page - Contact Information Section	N/A (See the Person Data page)	Update a person's name, address, phone, and email information.
Person Data Page - Regional Section	N/A (See the Person Data page)	Maintain regionally-required information about a person.
Person Data Page - <Drop Zone> Section	N/A (See the Person Data page)	Update information for custom steps that use drop zones embedded in your activity guide process.
Person Data Page - Validation Section	N/A (See the Person Data page)	View error and warning messages related to the Person Data validation process, if any.
Modify Person - Summary Page (See Add Person - Summary Page)	PERSONAL_DATA4_FL	View the proposed information you are updating for a person record.
Person Confirmation Page	PERSON_DATA_SUB_FL	Confirm that a person record was successfully updated. You can also initiate the process to add or modify person data, creating or view organizational relationships, or view or modify job data for an existing person.

Related Links

(Fluid) Adding a Person

Modify Person Tile

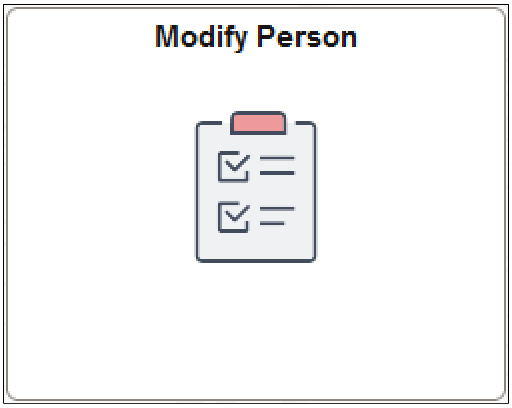
Administrators use the Modify Person tile to update a Person Data record.

Note: The following must be in place to see and access this tile and pages:
--The **Fluid Person and Manage Relationship** check box must be enabled on the Person and Job Installation - Person and Organization Page.
--You must be assigned the *HR Admin Modify Person* role.

Navigation:

The Modify Person tile is delivered as part of the fluid Manage Human Resources Dashboard.

This example illustrates the Add Person tile

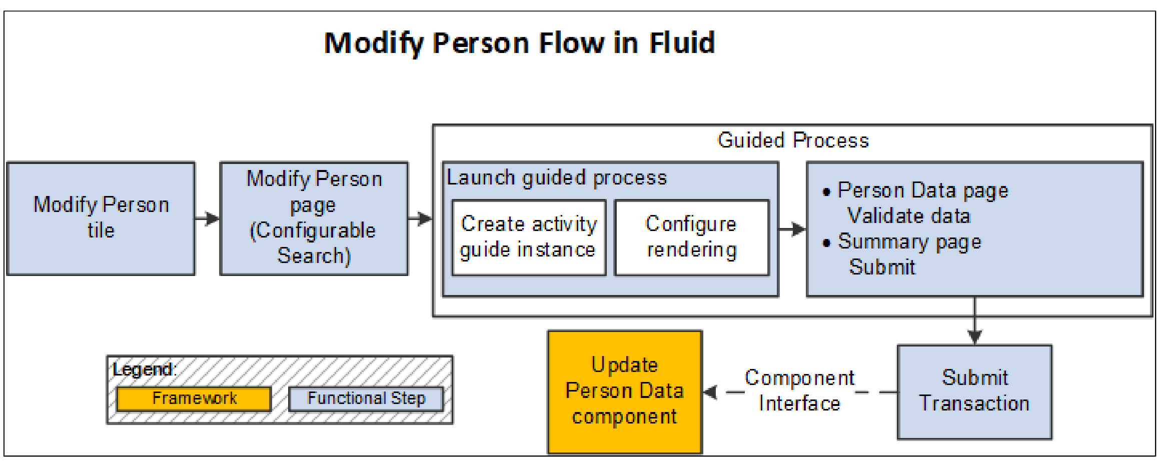


Select this tile to begin the process to modify an existing Person record only using fluid.

Modify Person Flow in Fluid

Use the following steps to perform the fluid-based approach to quickly update a Person record:

This diagram shows the high-level functional pages and steps to modify a person using the fluid pages.



1. Select the Modify Person Tile to begin the process (**Workforce Administrator home page** > **Manage Human Resources tile** > **Create Person of Interest Tile**).

   Note: Users can also access the Add Person and Create <Organizational Relationship> search/match pages and select the Edit button for an existing person in the **Potential duplicates** grid to directly access the Modify Person pages.

2. Use the configurable search page to find a person record (see “Setting Up Search Configuration” (Application Fundamentals)).
3. Select a person to continue to the Modify Person activity guide process.

   There are two steps in this activity guide:

   - The Person Data Page to update person details.
   - The Modify Person - Summary page (see Add Person - Summary Page) to review the data.

   Note: The Modify Person activity guide uses the same pages as the ones for the Add Person activity guide, with the exception of the CheckList section. For page and field definitions, see the (Fluid) Adding a Person documentation.
4. Submit the information to update the Person Data record.

   Note: The Modify Person process does not use Approvals.

See also Fluid Add or Modify Persons, Create Organizational Relationships, and Manage Job Data Architectures.

Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

  Name, address, biographical (such as education, marital status, and language), checklist, and some regional fields are effective-dated. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time.

  Effective-dated biographical data is stored in the Personal Data History record (PERS_DATA_EFFDT). Name information is stored in the NAMES record with its own effective date. Address information is stored in the ADDRESSES record with its own effective date.
- Noneffective-dated data.

  Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This situation means that you can store only current information. The system stores noneffective-dated data in the Personal Data record (PERSON).

Note: PeopleSoft Human Resources also includes a workflow process for updating employee addresses.

Using Workflow to Update Person Addresses

Keeping a person's personal information current can be time-consuming. With workflow, users who do not ordinarily have access to the PeopleSoft Human Resources system can update their address data by using an email program to send the information to your PeopleSoft Human Resources system.

Updating Effective-Dated Personal Information

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the effective-dated locations (for example, for name, biographical information, or addresses).

   Each of these group boxes or sections can use different effective dates. They are not related.

2. Enter the date when the new personal data that you're entering will take effect.

   This date can be current or in the future.

3. Enter the new information.

4. Save the pages.

Related Links

“Effective Dates” (Application Fundamentals)

Updating Emergency Contact Information

The system updates a worker's emergency contact information automatically if you specify that the contact information is the same as the worker's contact information. When the emergency contact information is different from the worker's contact information, you must maintain the emergency contact information manually.

To activate the automatic emergency contact address update:

1. Access the address and phone pages:

   - (Classic) Administrators use the Contact Address/Phone page to update emergency contact information.
   - (Fluid) Employees use the “Emergency Contact (Detail) Page” (PeopleSoft eProfile) to update emergency contact information.

2. Select the following options *before* you update the worker's address:

   - (Classic) The administrator selects the **Same Address as Employee** and **Same Phone as Employee** check boxes on the Contact Address/Phone page.
   - (Fluid) The employee selects the **Same as Mine** and **Same Phone as Mine** check boxes on the “Emergency Contact - Address Page” (PeopleSoft eProfile)and “Emergency Contact - Phone Page” (PeopleSoft eProfile) respectively.

3. Select the type of address and type of phone number that is the same as the emergency contact.

   When you update the address, the system automatically updates the emergency contact address. It also updates the Update Dependent/Beneficiary pages in the Benefits menu and the Payroll Options pages in the Payroll menus.

If the emergency contact address changes and is no longer the same as the worker's, deselect the check boxes mentioned in the previous step. The system makes the address fields on the address and phone pages available, and you can enter a different address. After you deselect the check box, the system no longer updates the emergency contact address automatically.

Even if the emergency contact address is the same as the worker's, you can enter a different phone number.

4. Record additional emergency contact phone numbers for the emergency contact.
   - (Classic) Use the Other Phone Numbers page.
   - (Fluid) Use the "Emergency Contact - Phone Page" (PeopleSoft eProfile) and insert additional rows.

Related Links

Tracking Emergency Contacts

Modifying Addresses

To enter a new address for a worker:

1. Access the Contact Information page of section:
   - (Classic) **Workforce Administration** > **Personal Information** > **Biographical** > **Update Person Detail** > **Contact Information**
   - (Fluid) **Workforce Administrator home page** > **Manage Human Resources tile** > **Modify Person tile** and access the Person Data Page - Contact Information Section.
2. Add a new address row.
   - (Classic) Enter an address type, select the **Add Address Details** link, enter a new effective date for the address, select the **Add Address** link, and enter the worker's new address information.
   - (Fluid) Enter the address type, new effective date, and details on the Add Another Address page.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu when the (Classic) **Same Address as Employee** and **Same Phone as Employee** check boxes or (Fluid) **Same as Mine** and **Same Phone as Mine** check boxes are selected.

Changing Job Data

These topics lists components used to update job data, provide overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discuss how to:

- Update effective-dated job data.
- Enter promotions.
- Enter departmental transfers.
- Enter pay rate changes.
- Track leaves of absence.
- Enter terminations and retirements.
- Enter deaths.
- Enter rehires.
- Assign workers to different positions.
- Pay workers on disability.

Related Links

Understanding Job Data
"Maintaining Position Data" (PeopleSoft Human Resources Manage Positions)
Understanding PARs

Pages Used to Change Job Data

There are various was to update a person's job data.

- (Classic) If you are using the classic pages, use one of the three update components on the Workforce Administration menu to update a person's job data. These components are configured to simplify updating a person's record in different business situations.

  Use the Job Data component when you want to work with a person's historical job data. If you need to work with a person's current job only, use the Current Job component for faster system performance. You can work only with current and future job data on the Current Job pages.

- (Fluid) If you are using fluid pages, use the Manage Job Tile on the Workforce Administration dashboard, which uses the Job Data activity guide process to update a person's job data.

The following table describes each component and its navigational path:

Component	***Pages in the Component***	***Usage***
(Classic) Job Data **Workforce Administration > Job Information > Job Data**	Work Location (JOB_DATA1) Job Information (JOB_DATA_ JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ ERNDIST) Benefit Program Participation (JOB_ DATA_BENPRG)	Work with historical effective-dated rows of the person's job data (work with past, present, and future job data) using the classic pages. **Note:** The Classic Job Data functionality has been replaced by the Job Data functionality in Fluid. For more information, see (Fluid) Updating Job Data.
(Classic) Current Job **Workforce Administration > Job Information > Current Job**	Work Location (JOB_DATA1) Job Information (JOB_DATA_ JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ ERNDIST) Benefit Program Participation (JOB_ DATA_BENPRG)	Update only the person's *current* job record using the classic pages. Doing so improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
(Classic) Pay Rate Change **Workforce Administration > Job Information > Pay Rate Change**	Employee Profile (PAY_RT_ CHANGE1) Salary Plan (PAY_RT_CHG_ SALPLAN) Compensation (PAY_RT_CHANGE2) Job Earnings Distribution (PAY_RT_ CHANGE3)	Change the person's compensation without changing job data using the classic pages.

Component	Pages in the Component	Usage
(Fluid) **Workforce Administrator tile > Manage Human Resources tile > Manage Job tile**	Work Location (HR_JOBDATA_WL_FL) Job Information (HR_JOBDATA_JC_FL) Labor Information (HR_JOBDATA_JL_FL) Salary and Compensation (HR_JOBDATA_SAL_FL) Payroll (HR_JOBDATA_PAY_FL) Employment Data (HR_JOBDATA_EMP_FL) Benefit Program (HR_JOBDATA_BEN_FL)	Work with historical effective-dated rows of the person's job data (work with past, present, and future job data) using the fluid pages.

Note: If you are using position management, you will want to update most job data on the Position Data pages.
(USF) Update job information using the U.S. Federal pages.

Updating Compensation Packages Without Using an Update Component

If you update job record data without using one of the update components, for example when initially loading data or when using your own written processes, the system does not update the calculated fields on the job record. To update the calculated fields, run the Employee Compensation process. If you update job record data by using one of the update components or a component interface built on one of the update components, you do not need to run the Employee Compensation process because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because the system runs all business logic.

See “Refreshing Worker Compensation Packages” (PeopleSoft Human Resources Administer Compensation).

Understanding Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can review historical data from a particular time to analyze position data or employee records. Or you can plan ahead and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables that you see list only data that is valid as of the effective date of the current page. For example, if you create a new department code with an effective date of May 1, 2020 and enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2020, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—thus you do not have to retype any information that stays the same. (Ensure that you position the cursor on the data row that you want to copy before you insert the new row.) The only new information is the effective date, which is set by default to the system date (usually today's date).

Understanding Security for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective-Dated Sequence Numbers

When you transfer people from one department to another by using a data row that contains an effective-dated sequence number, the system currently allows users with security access to the old or new department to have access to all the job data. The system is delivered this way because implementing security in system views that are specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from department 1 to department 2 and give the employee a promotion on the same day, users with access to either department 1 or 2 have access to the employee's data because the transfer data row contains an effective-dated sequence number.

You can prevent this access by changing the security views for the PeopleSoft applications that you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Human Resources enables users to assign people to departments that they cannot access for updates. If you want to prevent a user from transferring a person into a department for which the person does not have access, use the PeopleSoft Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note: If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)
“Understanding PeopleSoft HCM System Data Regulation” (Application Fundamentals)

Understanding Personnel Actions and Human Resources and Payroll Status

When you select an action to change a person's job data, the system may change the person's HR or payroll, or job status. For example, when you select *Retired,* the system changes the HR status from *Active* to *Inactive.*

HR status indicates whether the person is still active in the human resources system. The **Payroll Status** field (for employees) indicates the payroll status or job status of the person. A person can have an active HR record but not be currently receiving pay (employee) or holding a job (contingent worker). Conversely, a person could have an inactive job record but continue to receive pay. For example, if you select retirement with pay, the system changes the HR status to *Inactive* and changes the payroll status from *Active* to *Retired with Pay.* The two status fields enable you to accurately identify the different types of people in your organization.

The statuses are based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in HR status or payroll status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefits Administration, PeopleSoft Payroll processing, and PeopleSoft Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

This table explains how the system sets status:

Personnel Action	***HR Status***	***Payroll Status***	***Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface***
Hire Add contingent worker Add person of interest Rehire (employees only) Return from leave Return from disability Additional job Recall from suspension or layoff Assignment	*Active*	*Active*	Yes
Leave of absence Short-term disability Long-term disability	*Active*	*Leave of Absence*	No
Paid leave of absence Short-term disability with pay Long-term disability with pay	*Active*	*Leave with Pay*	Yes
Retirement with pay (employees only)	*Inactive*	*Retired with Pay*	Yes
Terminated with benefits Terminated with pay	*Inactive*	*Terminated with Pay*	Yes

Personnel Action	***HR Status***	***Payroll Status***	***Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface***
Layoff Suspension Temporary assignment	*Active*	*Suspended*	No
Retirement	*Inactive*	*Retired*	No
Assignment completion Completion (contingent workers only) Termination	*Inactive*	*Terminated*	No
Pay rate change Demotion Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	Varies

Note: If your organization uses PeopleSoft Payroll for North America, the system does not generate payroll paysheets for workers whose status is *Retired* or *Terminated.* If you need to pay workers for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay.*

Related Links

"Understanding Payroll Data" (PeopleSoft Payroll for North America)

Updating Effective-Dated Job Data

Use the Job Data components to update job data, such as position and location information for a person's job, by effective date.

Navigation:

- (Fluid) Click the Manage Job Tile from the Manage Human Resources Dashboard or from any other fluid home page where you have added the tile.
- (Classic) **Workforce Administration** > **Job Information** > **Job Data** > **Work Location**
- (Classic) **Workforce Administration** > **Job Information** > **Current Job** > **Work Location**

To update effective-dated job data:

1. Locate the person whose record you want to change.
   - (Fluid) Start on the Job Actions Summary Page and click the **Create Job Action** button to enter a new effective date.
   - (Classic) Always start on the Work Location page because that's where the **Effective Date** field is.
2. Insert a new data row.
3. In the **Effective Date** field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion.*
5. If applicable, enter a reason code to explain why this action is occurring.
6. You may have to go to other pages to enter more information about the personnel action that you're taking. Change any other data needed to complete the new action on the appropriate pages in the component.

   For example, when you promote an employee, you most likely enter a new job code or a new position number on the Work Location page. You might also select a new salary administration plan, grade, and step, enter a new compensation rate on the salary and compensation-related pages, and enter a new business title and work phone on the employment-related page.
7. Save the transaction.

Entering Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. For the person whose data you're updating, access the:
   - (Fluid) Job Actions Summary page (**Workforce Administration home page** > **Manage Human Resources tile** > **Manage Job tile**).
   - (Classic) Work Location page **(Workforce Administration** > **Job Information** > **Job Data** > **Work Location)**

2. Insert a new data row for the first action.

    - (Fluid) Click the Create Job Action button to access the Create Job Action page.
    - (Classic) Insert a new data row on the Work Location page.

    The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at *0.*

3. Enter any other information that you need to complete the action, either here or in other pages in the component.

4. To enter the second action:

    - (Fluid) Submit the first transaction from the (Fluid) Job Data - Summary Page, then return to the Job Actions Summary page and click the **Create Job Action** button to insert another row.
    - (Classic) Return to the Work Location page and insert another data row.

5. Enter the same effective date as the first action, but enter an effective date sequence number of *1*.

6. Select the appropriate personnel action and enter any other information required to implement the action, either here or on other pages.

Entering Promotions

A promotion usually involves a change of salary grade and new job code. This table lists the pages and fields that you typically update when you enter a promotion (you may need to update additional pages and fields):

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action Code:** *Promotion* **Reason Code** (if applicable)	Entries on the pages could change when you enter a promotion, depending on the data for the former job and the new job.
(Fluid and Classic) Work Location	Position Number	If you're organizing part or all of PeopleSoft Human Resources by position, review PeopleSoft HR: Manage Positions.

Affected Pages	***Affected Fields***	***Comments***
(Fluid and Classic) Job Information	**Job Code** **Regular/Temporary** **Full/Part** **Standard Hours** **Work Period** **FTE** **Shift** **Shift Rate** **Contract Number** Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Human Resources by position, review *PeopleSoft HR: Manage Positions*.
(Fluid) Salary and Compensation (Classic) Salary Plan (Classic) Compensation	**Salary Administration Plan/Grade/ Step** **Compensation Rate**	(Classic) Update Salary Plan/Grade/ Step on the Salary Plan page. Update compensation information on the Compensation page. (Fluid) Update salary and compensation data on one page.
(Fluid) Employment Data (Classic) Employment Information	**Business Title** **Work Phone**	Update these fields as needed.

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the worker's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Human Resources by position, use the transfer action to move a worker from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

This table lists the pages and fields that you typically update when you enter a transfer (you may need to update additional pages and fields):

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action Code:** *Transfer* **Reason Code** (if applicable)	

Affected Pages	***Affected Fields***	***Comments***
(Fluid and Classic) Work Location	Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit that you're using.
(Fluid) Employment Data (Classic) Employment Information	**Business Title** **Work Phone**	Update these fields as needed.

Related Links

"Understanding Positions" (PeopleSoft Human Resources Manage Positions)

"Understanding PeopleSoft HCM System Data Regulation" (Application Fundamentals)

Entering Pay Rate Changes

This table lists the pages and fields that you typically change when you enter a pay rate change. You may need to update additional pages and fields, as well.

Note: If you do not need to modify any job-related information, you can use the Pay Rate Change component.

See Updating Salary Information.

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action Code:** *Pay Rt Chg* (pay rate change) **Reason Code** (if applicable)	Enter *Pay Rate Change* to enter a salary change that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Salary and Compensation (Classic) Salary Plan	**Salary Administration Plan/Grade/ Step**	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because if the pay rate resulted from a change in salary grade, you enter the rate change as part of a promotion or other action. If you selected the **Multi-Step/Grade** check box on the Installation Table page and you enter a new step on this page, click the **Default Pay Components** button on the page if you want the system to supply default values for that step. Doing so is necessary unless you have distributed the worker's earnings by amount on the Earnings Distribution section. For job earnings distributions, manually update the distribution for the new rate.

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Salary and Compensation (Classic) Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this worker. If you selected the **Multi-currency** check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The system calculates the compa-ratio (or percent through range calculation) based on the salary plan and grade and in the base currency that your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where a worker falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of 26,000 USD in a range of 25-30,000 USD for the salary grade, the percent through range is 20 percent.
(Fluid) Payroll (Classic) Job Earnings Distribution	Job Earnings Distribution	Update as needed to distribute the worker's compensation hours or earnings.

Note: Modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period on the appropriate pages.

Tracking Leaves of Absence

Many workers take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks workers' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

This table lists the pages and fields that you typically change when you enter a leave of absence (you may need to update additional pages and fields, as well):

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Leave of Absence, Leave of Absence with Pay,* or *Paid Leave of Absence* **Reason Code** (if applicable)	None
(Fluid) Work Location (Classic) Employment Information	**Expected Return Date**	Enter the date when you expect the worker to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the worker returns from leave, the system deselects this field.

Tracking Multiple Types of Leave for One Worker

You might encounter situations in which you need to enter multiple types of leave for the same worker. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then you access the appropriate page to make any other changes pertaining to that leave, such as compensation changes.

Entering Returns from Leave

Most workers eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time workers begin their leaves when they plan to return to work. Enter the return from leave information at the same time that you enter the leave of absence, or as soon as you have a confirmed return date.

This table lists the pages and fields that you typically change when you enter a return from leave (you may need to update additional pages and fields, as well):

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Return from Leave* **Reason Code** (if applicable)	None

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Work Location (Classic) Employment Information	**Expected Return Date**	When you save the pages, the system deselects this field.

Entering Terminations and Retirements

When a worker retires or leaves your organization for some other reason, you enter the termination into the person's record.

This table lists the pages and fields that you typically change when you enter a termination or retirement (you may need to update additional pages and fields, as well):

Affected Pages	***Affected Fields***	***Comments***
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Terminated, Terminated with Pay, Terminated with Benefits, Retirement,* or *Retirement with Pay* **Reason Code,** if applicable	The system treats the effective date that you enter as the day the termination starts and the first day the worker is no longer paid. For example, if the worker's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the worker isn't paid for the last day of work.
(Fluid) Work Location (Classic) Employment Information	**Termination Date**	The system displays the day *before* the effective date as the termination date and last date worked. If you rehire the worker, the system deselects both these fields. When a worker returns from leave, the system deselects only the **Date Last Worked** field.

Inactivating a Person's Job Profiles Upon Termination

The Event Manager event AssignmentTerminated is raised when an employee's status is changed to inactive on the job record. The Event Manager also raises the *HJPM_EM_EVENTS:Handlers:InactivatePersonProfile* event to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then the person profiles in the Manage Profiles application for that employee ID are also inactivated.

See “Person Profile Page” (PeopleSoft Human Resources Manage Profiles) and “PeopleSoft Events and Notifications Framework Overview” (Events and Notifications Framework).

Entering Deaths

This table lists the pages and fields that you typically change when you enter a termination due to death:

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Terminated* **Reason Code:** *Death*	The system treats the effective date that you enter as the day the termination starts and the first day that the worker is no longer paid.
(Classic) Modify a Person - Biographical Details	**Date of Death**	Record the date that the worker died.
(Fluid) Work Location (Classic) Employment Information	Various dates	The system displays the termination effective date as the termination date, and the day before the termination date as the date last worked. The system uses these dates and the effective date in payroll processing and reporting.

Entering Rehires

You may want to rehire a person who worked for your company in the past. Information on a rehired worker is probably already in PeopleSoft Human Resources, unless the worker data was deleted or archived. Before you rehire workers, you may want to make sure that the personal, employment, and job data is current. If a rehired worker doesn't have a record in the system, do not use the update pages. Instead, add a new employment or contingent worker instance.

See Understanding Job Data.

See Defining Personnel Actions and Reasons.

Because you probably rehire a worker whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

This table lists the pages and fields that you typically change when you enter a rehire (you may need to update additional pages and fields):

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Rehire* **Reason Code,** if applicable	You can rehire only workers whose payroll or job status is *Terminated, Terminated with Pay, Retired,* or *Retired with Pay.*
(Fluid and Classic) Work Location	Last Start Date	When you save the pages, the system automatically completes the last start date.

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Employment Data (Classic) Employment Information	**Company Seniority Date** **Benefits Service Date, Years, Months, and Days** **Seniority Pay Calc Date, Years, Months, and Days**	You may want to change the company seniority date and other assignment dates. The company seniority date can serve as the basis for the worker's seniority, or you can use it for other tracking and reporting purposes. The benefits service date is the date on which the worker's service ranking is based and is used for benefit-related matters. The seniority pay calculation date is the date that the system uses to calculate seniority-based pay. When you save the pages, the system automatically recalculates the corresponding years, months, and days.

Related Links

Understanding Job Data

"Understanding PeopleSoft Security" (Application Fundamentals)

Assigning Workers to Different Positions

If you're organizing part or all of PeopleSoft Human Resources by position, you often move workers from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and worker data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table lists the pages and fields that you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an assignment, the system also updates the Position Data - Work Location page. It automatically calculates and displays the new head count and shows the appropriate indicator in the **Open/Filled** field.

Affected Pages	*Affected Fields*	*Comments*
(Fluid) Create Job Action (Classic) Work Location	**Effective Date** **Action:** *Position Change, Transfer, Promotion,* or *Rehire* **Reason Code,** if applicable	

Affected Pages	Affected Fields	Comments
(Fluid and Classic) Work Location	Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the (fluid) **Override Details** yes/no switch or (classic) **Override Position Data** button, which makes the previously unavailable fields available for entry, such as the Location and Department fields on this page, or the Job Code field on the Job Information page. You can then enter exceptions in these fields. The Position Management Record field is display-only. The system uses this value to indicate that it has automatically inserted a data row on the Job Data pages due to changes that you made to fields on the Position Data pages. **Note:** If you override the defaults, you must maintain the job data manually—the system does not update position data automatically again until you deselect the override option. The system issues a warning message if you assign a worker to a position that has already been filled by another worker and if a new appointment exceeds the maximum head count for that position.

Related Links

“Understanding Positions” (PeopleSoft Human Resources Manage Positions)

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note: This feature works only for hourly employees, not for salaried employees.

When you enter an action of *STD* (short-term disability with pay) or *LTD* (long-term disability with pay), the system changes the employee's status to *Leave With Pay.*

To send 100 percent of the employee's pay to the disability plan earnings code, access the (fluid) Payroll or (classic) Job Earnings Distribution page, select the *By Percent* option, enter the appropriate disability earnings code, and enter a percent of *100*.

Note: When you put an employee on disability, don't forget to check additional pay records and make any necessary changes.

(Classic) Updating Job Data

Use the Job Data component when you want to work with a person's historical job data using the classic pages.

Note: The Classic Job Data component has been replaced by the Job Data functionality in Fluid. For more information, see (Fluid) Updating Job Data.

Related Links

Changing Job Data

Pages Used to Update Job Data Using Classic

Classic Page Name	***Definition Name***	***Usage***
Work Location Page	JOB_DATA1	Update position and location information for a person's job.
Job Information Page	JOB_DATA_JOBCODE	Update information about a person's job.
Job Labor Page	JOB_LABOR	Update national labor agreement data.
Payroll Page	JOB_DATA2	Update payroll processing data.
Job Earnings Distribution Page	JOB_DATA_ERNDIST	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types.
Job Data - Salary Plan Page	JOB_DATA_SALPLAN	Update a person's salary plan information.
Compensation Page	JOB_DATA3	Update a person's compensation information.
Employment Information Page	EMPLOYMENT_DTA1	Update optional employment information.

Classic Page Name	Definition Name	Usage
Benefit Program Participation Page	JOB_DATA_BENPRG	Update a person's benefit enrollment information.

(Fluid) Updating Job Data

Access the Manage Job Tile to use the Job Data activity guide process when you want add new job rows or update a person's job data using the fluid pages.

This topic provides an overview of the Manage Job - Search Criteria Page, Job Actions Summary statuses and approvals, and discusses using PeopleSoft Fluid User Interface to manage Job Data transactions.

For general information on updating job records, see the Changing Job Data topic, which provides overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discuss different types of job updates.

Related Links

Changing Job Data
Understanding Fluid Person and Job Data
“Understanding Page and Field Configurator” (Enterprise Components)
“Understanding the Activity Guide Composer” (Enterprise Components)
“Approval Framework Overview” (Approval Framework)

Pages Used to Update Job Data Using Fluid

Page Name	Definition Name	Usage
Manage Job Tile	HC_HR_JOB_DATA_SUM_FL_GBL (this is the cref for the tile)	Update and manage job data for your workforce using fluid pages.
Job Actions Summary Page	HR_JOBDATA_SUM_FL	View job data rows and initiate the process to create, delete, edit, or view a job data row (based on your user access).

Page Name	***Definition Name***	***Usage***
Create Job Action Page Correct Job Data Page	JOB_REQ_ADD_SCF	Add a new effective data job data row and identify the action and reason for the job change. **Note:** When updating an existing job data row, the page title will display Correct Job Data. The field values entered on this page act as input parameters for the guided process. Meaning, the administrator can use any of these fields to configure the steps and fields in the guided process. In addition to **Action** and **Action Reason**, your organization may want to use fields such as **Regulatory Region** and the **Business Unit** of employees to configure the guided steps and page fields that the Page and Field Configurator displays. **Regulatory Region** and **Business Unit** fields are disabled by default, but you can enable them based on your organization requirements.
Review Details Page	JOB_REQ_RETRO_SCF	Identify potentially impacted rows due to the addition of new or updated job data rows.
The Activity Guide Composer Framework for the Manage Job Component	N/A	The Manage Job component pages in Fluid appear within the context of an Activity Guide Composer process. The PeopleSoft HCM application delivers the *Job Data* (JOBDATA) template for this component.
(Fluid) Work Location Page	HR_JOBDATA_WL_FL	Update position and location information for a person's job, including the regulatory region, company, department, and location.
(Fluid) Job Information Page	HR_JOBDATA_JC_FL	Update information about a person's job, including status, employee class, shift, or standard hours.
(Fluid) Labor Information Page	HR_JOBDATA_JL_FL	Update National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
(Fluid) Salary and Compensation Page	HR_JOBDATA_SAL_FL	Update information about a person's salary plan and compensation information.

Page Name	***Definition Name***	***Usage***
(Fluid) Payroll Page	HR_JOBDATA_PAY_FL	Update payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Salary and Compensation page. Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
(Fluid) Employment Data Page	HR_JOBDATA_EMP_FL	Update optional employment data, such as a worker's business title.
(Fluid) Benefit Program Page	HR_JOBDATA_BEN_FL	Update the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.
(Fluid) <Drop Zone> Pages	HR_JOBDATA_DZ1_FL HR_JOBDATA_DZ2_FL HR_JOBDATA_DZ3_FL HR_JOBDATA_DZ4_FL	Update custom steps that use drop zones embedded in your activity guide process.
(Fluid) Job Data - Attachments Page	HR_JOBDATA_ATT_FL	Add or view attachments for a job data row.
(Fluid) Validate Page	HR_JOBDATA_VAL_FL	Verify the details you have entered during the course of the transaction.
(Fluid) Job Data - Summary Page	HR_JOBDATA_TS_FL	Review a summary of the job row changes prior to submitting the transaction.
(Fluid) Job Data - Comments Page	HR_JOB_COM_SCF	Add comments and finalize the submitting process for a Job Data change.
(Fluid) Job Data - Submit Confirmation Page	HR_JB_SUB_CNF_FL	Confirm that your job data updates have been submitted
Job Details Page	HR_JOBDATA_VW_FL	View a complete summary of the job data rows for a person by effective date

Page Name	***Definition Name***	***Usage***
Request History Page	HR_REQ_HIST_SCF	View all the comments related to a job data row.

Note: The Job Search (HC_HR_JOB_DATA) search index supports real time indexing (RTI) with PeopleTools version 8.59.07 or higher. When enabled, RTI allows real-time updates to the indexed data to provide job search using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, "Administering Real Time Indexing."

Understanding the Manage Job - Search Criteria Page

Fluid Job Data uses the Configurable Search functionality, which gives organizations the ability to define how the search page will perform and the search field layout. Your organization has control over which fields should appear as criteria, as well as their field order, on the Fluid Manage Job - Search Criteria page. This allows you to search for an employee using other means, such as location, department, HR status, or job code.

For information on setting up search page configurations, see "Setting Up Search Configuration" (Application Fundamentals) documentation for more information.

These videos provide an overview of the Configurable Search feature:

Video: Image Highlights, PeopleSoft HCM Update Image 36: Configurable Search

Video: Image Highlights, PeopleSoft HCM Update Image 38: Fluid Job Data Search Enhancements

Delivered Manage Job Search Record

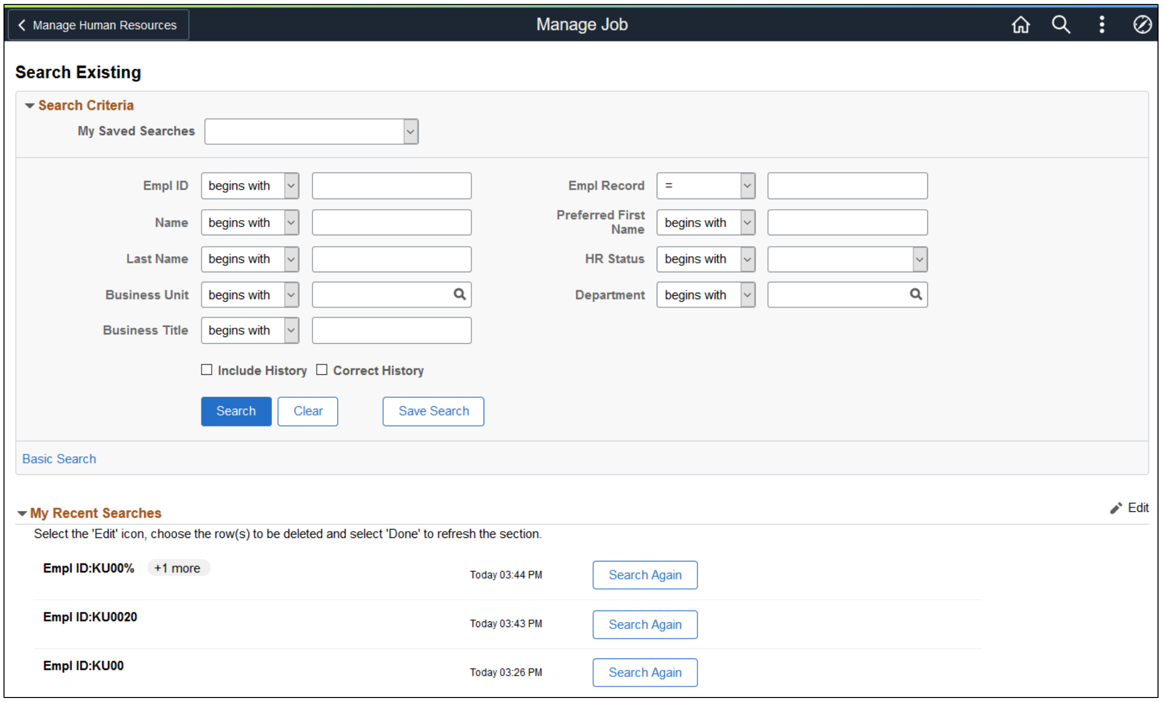
The PeopleSoft Job Data Modernization feature delivers the fluid *Manage Job* search page. This search uses the standard search record *EMP_SRCH_COR_FL*. Using this search record, administrators can configure the page to use search criteria such as preferred name, pay group, full or part-time status, HR status, and more.

Manage Job - Search Criteria Page

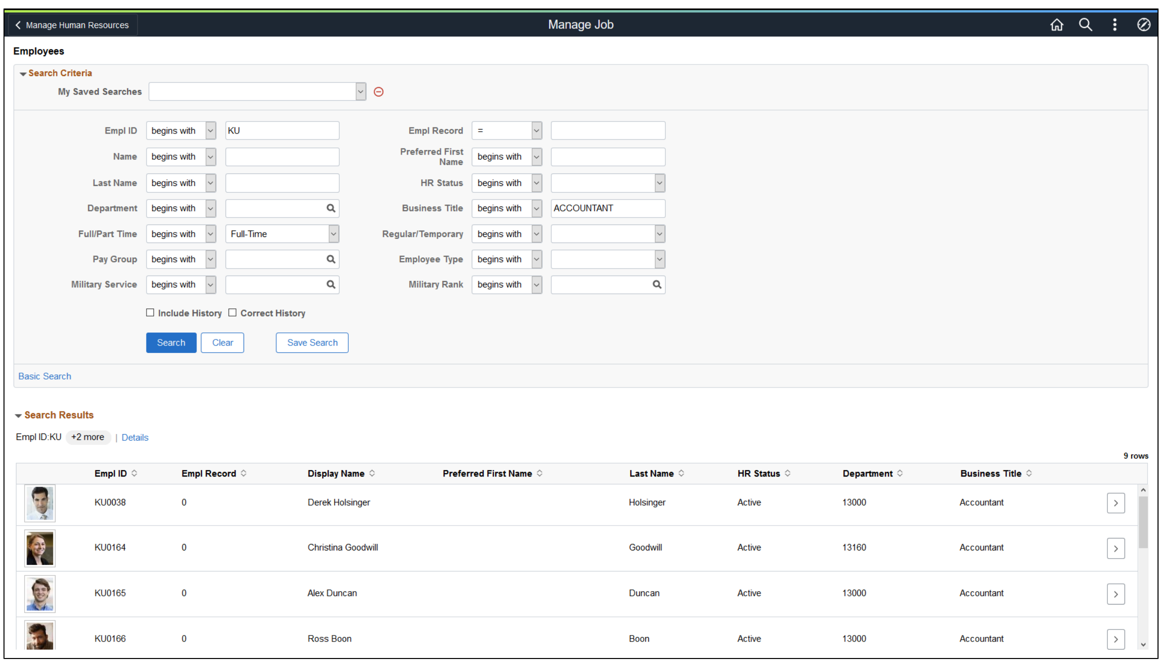
When you select the Manage Job tile, the system displays the configurable Manage Job - Search Criteria page (EOSF_SRCH_FL) to search for job records using fluid.

The page first appears in the Advanced Search mode, where you can use multiple search fields and save your searches, or you can switch to the Basic Search, where you can use the **Search By** field to retrieve data. Administrators responsible for creating search configurations can modify these options according to the needs of your organization.

This example illustrates the Manage Job - Search Criteria page and recent searches.



This example illustrates the Manage Job - Search Criteria page showing search results.



For an explanation of additional fields and controls on this page, see the Setting Up Search Configuration, “<Transaction Search or Add> Page” (Application Fundamentals) documentation.

Term	*Definition*
Include History	Select to retrieve all rows for this person. Although you can view all the rows, you cannot make corrections to historical rows in this mode.
Correct History	Select to retrieve all rows for this person. In this mode you can make corrections to historical rows. You many need to select this option to performs reviews when the review process is enabled on the Person and Job Installation - Job Data Page.

Note: Update/Display is the default mode that gets applied if Include History or Correct History is not selected. You can add a new top row in this mode but you cannot view historical rows. Availability to access modes are based on your security access and modes may not be available for all users.

Understanding Job Actions Summary Statuses and the Approval Process

The Job Actions Summary page lists the status for the various job rows. When approvals is enabled, the status of the transaction will vary based on where the transaction is in the approval process.

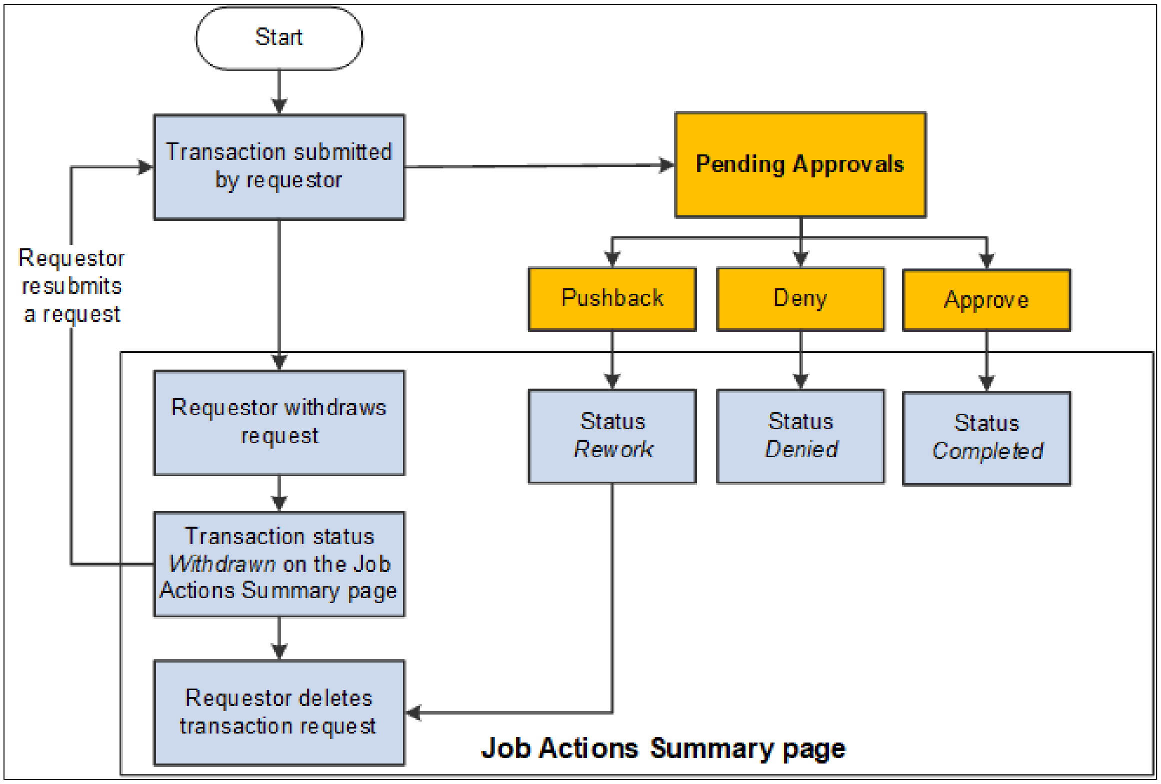
Submitting a New Transaction Request

When a user submits a new transaction request, the status of the job row is changed to *In-Progress* and submitted to the approvers. While the request still has an *In-Progress* status and the approval request is still pending, the user can opt to withdraw the request by clicking the Actions icon on the Job Actions Summary page and selecting Withdraw. When a row has the status of *Withdrawn*, the user can resubmit the request for approval or delete the job data row by clicking the Actions icon for the row and selecting the Delete option.

When the approver receives the request, he or she can perform one of the following actions:

- Pushback: Changes the status to *Rework* and the requestor can delete the transaction request.
- Deny: Changes the status to *Denied* or *Correction Denied*.
- Approve: Changes the status to **Completed**.

This diagram illustrates how the status of a job transaction for a new row is updated when an approver responds to a job data request.



Submitting a Corrected Transaction Request

When approvals is enabled for correction and a corrected row is sent for approval, the status of the row set to *Correction In-Progress*.

When the *Correction In-Progress* row is approved, the status becomes *Completed*.

When a *Correction In-Progress* row is denied, the status changes to *Correction Denied*. Once denied, the Job Actions Summary page will display two rows: one with a status of *Completed* and another row with the status of *Correction Denied*. The original row that held the *Completed* status before the correction appears to ensure that the user can see the original details.

Note: Status values are delivered based on the delivered functionality and approval flow capabilities. The status values are not configurable.

Correcting Key Fields

When you correct a row and the update involves a key field change (such as, effective date or sequence) the Job Actions Summary page will show two rows: a parent row and the *In-Progress* row with the key field changes.

Note: In these cases, the parent row controls (**Edit** and **View Job Details** chevron buttons) will be disabled until the row with key correction changes is completed.

Related Links

Job Actions Summary Page

Manage Job Tile

Administrators use the Manage Job tile to update and manage job data for your workforce using fluid pages.

Note: You must be assigned the *HR Administrator Fluid* role to access this tile and pages.

Navigation:

The Manage Job tile is delivered as part of the fluid Manage Human Resources Dashboard, or from any other fluid home page where you have added the tile.

You can add the Manage Job tile or Manage Human Resources Tile, which accesses the Manage Human Resources dashboard, to any home page through personalizations. From the Personalize Homepage page, click **Add Tile**. Enter the tile name or navigate to **Workforce Administrator** > **Manage Human Resources**, select the tile, then save.

This example illustrates the Manage Job tile.

Click this tile to access the Manage Job - Search Criteria page and search for workers.

Job Actions Summary Page

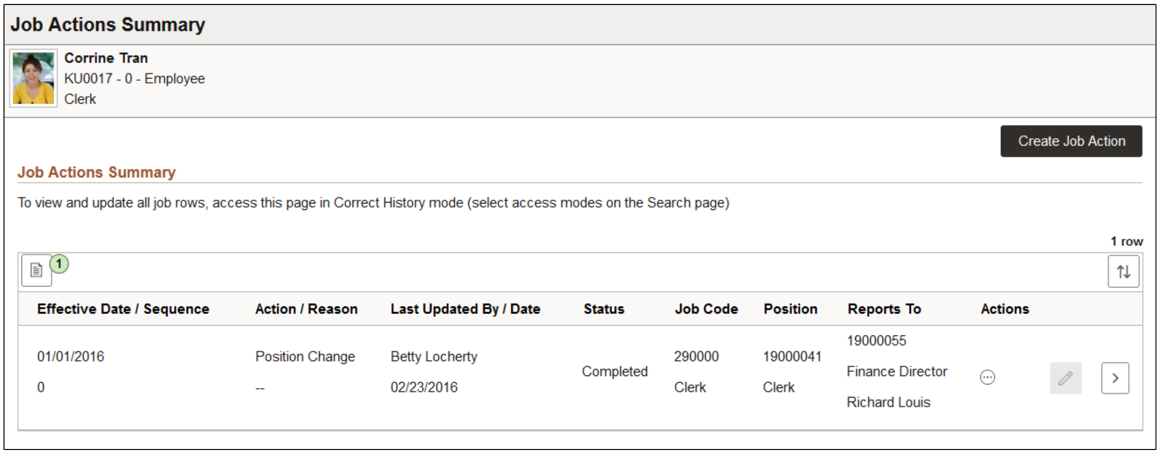
Use the Job Actions Summary page (HR_JOBDATA_SUM_FL) to view job data rows and initiate the process to create, delete, edit, or view a job data row (based on your user access).

Navigation:

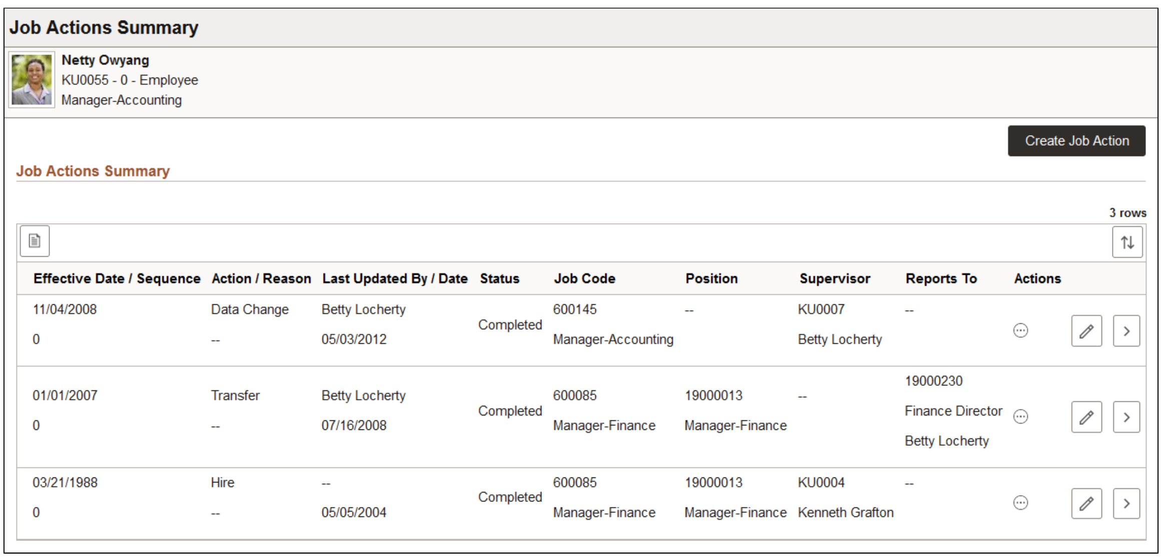
Click the **Continue** arrow (>) button for a worker row on the Manage Job - Search Criteria page.

Note: When only one person matches the search criteria, the system will automatically direct you to this page. If you need to access the person's job record using **Include History** or **Correct History** mode, use the Search Results button in the banner to return to the search page and select the appropriate mode.

This example illustrates the fields and controls on the Job Actions Summary page in Update/Display mode.



This example illustrates the fields and controls on the Job Actions Summary page when accessed in Correct History mode.



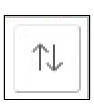
This page shows a quick summary of an employee's job data. The default mode for accessing this page is Update/Display and typically shows only the most current row, although there may be other rows, such as future-dated or in-progress rows. To see all job data rows for an employee, access this page by selecting either the **Include History** or **Correct History** option from the Search Criteria page, if available with your user privileges.

The fields on the page are determined by the Page and Field Configurator. HCM provides configurations for all PeopleSoft actions delivered by PeopleSoft.

Important! You can enable or disable columns for the Job Actions Summary page using Page and Field Configurator. If you modify the HR_JOB_DATA_SUM_FL (Action and Reason Modal) component, consider displaying only those field columns that are of most importance for an employee's job data summary to avoid the need of horizontal scrolling. If you make changes to the component in the Page and Field Configurator, you will need to click the **Apply Configurations** button on the Map Configuration page. See also the Job Actions Summary configurable grid technical brief on My Oracle Support for more information on updating this page.

Note: You should not disable fields that are required for an action. For example, for the action *POS* (Position Change), the **Position Number** field on Job Information page must be enabled.

For more information on setting up this information, see the "Understanding Page and Field Configurator" (Enterprise Components) documentation.

Field or Control	***Description***
Create Job Action button	Select this button to enter a new effective dated row. **Note:** You cannot add a new row after an *In-Progress* row.
 (Notes button)	Select this icon button to open the Job Data Notepad page where you can enter or search for notes for this person's job data. **Note:** When setting up the HR Notepad Configuration - "HR Notepad Configuration - Configure Keys Page" (Application Fundamentals), if you have included the **Effective Date** and **Effective Sequence** for fields for the *JOB* sub-ID, Oracle recommends that you deselect the **Enterable** and **Required for Query** check boxes in the configuration. If the **Effective Date** and **Effective Sequence** check boxes are selected in the configuration, the Notes icon and Related Actions - Notes link will have the following behaviors: 1) When you select the Notes icon from this page, the Job Data Notepad page will show all the notes available for the employee and employee record combination. 2) When you select the Notes icon from this page, you will not be able to add a new note if the **Required** check box is selected in the configuration for the **Effective Date** or **Effective Sequence** field rows in the configuration. 3) The **Actions** - **Notes** link will show the notes available for the particular effective date and effective sequence only. The Notes Icon with a number badge indicates the total number of notes available for this person's job data. If there are no notes available for the job, the number badge is not shown.
	Select to sort the rows by user prefernce.

Field or Control	Description
Status	Displays the status of the job row. **Note:** You can only have two *In-Progress* rows at a time. If one *In-Progress* row exists, you cannot add a new row. You can however, correct another row or add a retroactive row, but you cannot exceed more than two *In-Progress* rows. We recommend that to add a new transaction row, complete the approval process for an *In-Progress* request first. You cannot add a row on top of rows with a *Withdrawn* or *Rework* status. For more information up status and how they are updated by the Approval process, see Understanding Job Actions Summary Statuses and the Approval Process.

Field or Control	Description
Actions Related Actions icon button	Select this icon to open the Related Actions popup menu and select from a list of additional action items. Although options may vary, items may include: • *ACA Eligibility Details*: Opens the "ACA Employee Eligibility Page" (PeopleSoft Human Resources Manage Base Benefits) in a new window where you can provide details about the employee ACA eligibility. This option is available when the country associated with the regulatory region for this person is *USA* and the company is associated with an ACA Common ID from the ACA Company Table. The logged in user must also be authorized to access the ACA_ELIGIBILITY component. If it does not meet these requirements, the item will be hidden. • *Approval Chain*: Opens the View Approval Chain page, where you can review information about all approvers and their approval status. This option is available when a job transaction uses the Approval process. • *Attachments*: Opens the View and Download Attachment page to view any attachments associated with this row. This option is available when attachments have been associated with the job data row from this component. Note that it will not appear for attachments you added using another business process, such as the Guided Self Service pages. • *Delete*: Opens the Delete Job Action page where you can review or remove a job data row. This option is available when a job row status is Withdrawn or Rework and you want to remove the row from the summary list. It is also available for users assigned the HR Review Administrator role. • *Notes*: Opens the Job Data Notepad page where you can enter or view notes for the job row. • *Time Reporter Data*: Opens the "Create Time Reporter Data Page" (PeopleSoft Time and Labor) in a new tab window where you can enroll a time reporter into the Time and Labor system. When time reporter data exists, it opens the "Maintain Time Reporter Data Page" (PeopleSoft Time and Labor) in a new tab window. • *Withdraw*: This option is available when a job row status is *In Progress* and you wish to remove the job data transaction request. After a request is withdrawn, the status changes to *Withdrawn*. At this point, you can either rework the request or delete it.

Field or Control	Description
	Note: The menu will display a related action only if the logged in user is authorized to access a component.
(Edit) button	This button is available for selection when in Correct History mode or for future rows. Click to access the row and make corrections to the job data. When you select an existing row to make updates, the system will open the Correct Job Data page (see also Create Job Action Page) using the existing date and job action for that row. Click Continue to move to the Job Data activity guide pages. When the system is set up to use the Review Process, and you are correcting a row that predates higher rows, the system will open the Review Details Page. To further understand this process, see the (Fluid) Working with the Job Data Review Process topic.
(View Job Details) button	This button is available in all modes. Click this button to open the Job Details Page in a new tab window and view job details.

Note: When the same job data transaction row has been added from the Guided Self Service (GSS) pages, you will need to delete the *In Progress* row you created from this page to display the completed GSS row. See "Performing Guided Self-Service Transactions in Manager Self-Service" (PeopleSoft eProfile Manager Desktop).

Related Links

"Configuring and Working with the HR Notepad" (Application Fundamentals)

Create Job Action Page

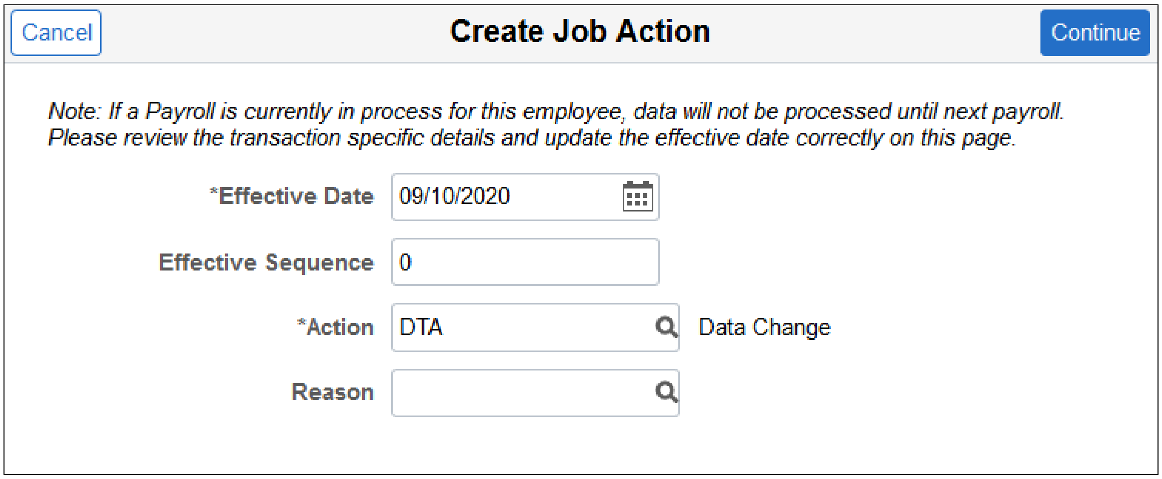
Use the Create Job Action page (JOB_REQ_ADD_SCF) to add a new effective data job data row and identify the action and reason for the job change.

Note: When updating an existing job data row, the page title will display Correct Job Data.

Navigation:

- Click the **Create Job Action** button on the Job Actions Summary Page.
- Click the **Edit** button for an existing job data row.

This example illustrates the fields and controls on the Create Job Action page.



The field values entered on this page act as input parameters for the guided process. Meaning, the administrator can use any of these fields to configure the steps and fields in the guided process. In addition to **Action** and **Action Reason**, the your organization may want to use fields such as **Regulatory Region** and the **Business Unit** of employees to configure the guided steps and page fields that the Page and Field Configurator displays. **Regulatory Region** and **Business Unit** fields are disabled by default, but the administrator can enable them based on your organization requirements.

Field or Control	***Description***
Effective Date	Enter the effective date.
Effective Sequence	Enter a number to track multiple administrative actions that occur on the same day. The default value is *0,* the correct number for new instances.
Action and **Reason**	Select the action requiring you to create or modify this record. The system displays a default value when you create a new employment, contingent worker, or POI instance. Reason codes are associated with the action you select. **Note:** The action and reason you select here may impact the steps and fields that are available for the Job Data activity guide process. For more information about configuring the pages and fields by Action, see the "Understanding Page and Field Configurator" (Enterprise Components) documentation. This video provides an overview of the Page and Field Configurator: Video: PeopleSoft Page and Field Configurator

Enter the pertinent information for the new row and click the **Continue** button to access the Job Data activity guide process.

Review Details Page

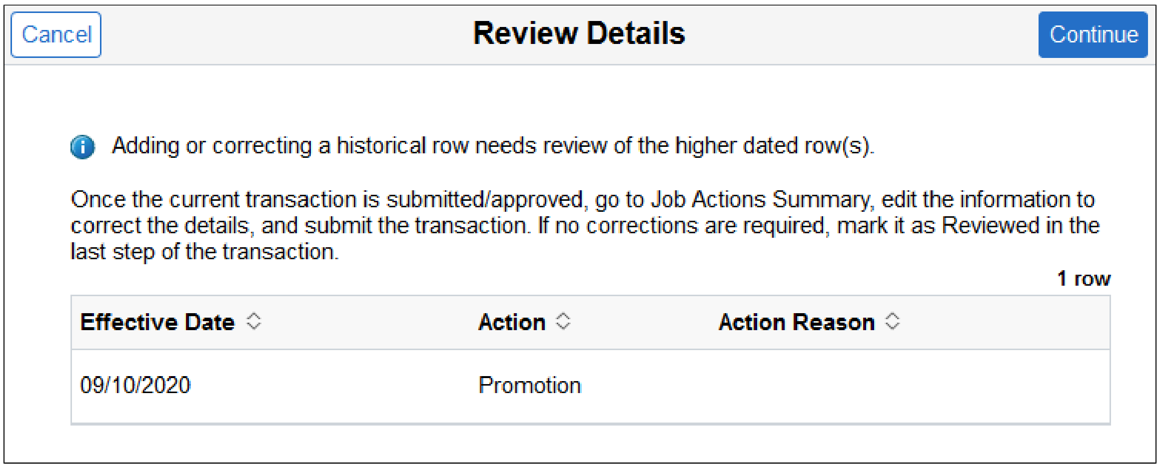
Use the Review Details page (JOB_REQ_RETRO_SCF) to identify potentially impacted rows due to the addition of new or updated job data rows.

Note: The Review Process must be enabled on the Person and Job Installation - Job Data Page.

Navigation:

Click the **Edit** button for a job data row that predates other rows or click the **Create Job Action** button to insert a retroactive row from the Job Actions Summary Page.

This example illustrates the Review Details page.



This page will display all the rows with a higher effective dated row than the one your are updating or adding. Click the **Continue** button to move to the Job Data activity guide process.

For more information on using the review process, see the (Fluid) Working with the Job Data Review Process topic.

The Activity Guide Composer Framework for the Manage Job Component

The Manage Job component pages in Fluid appear within the context of the Activity Guide Composer process. The PeopleSoft HCM application delivers the *Job Data (JOBDATA)* template for this component.

The Manage Job component uses a vertical non-sequential activity guide template to render the guided process. The activity guide shows a list of Job Data pages (or steps) in the left panel and the page that corresponds to the current selected page step in the right panel. The activity guide also provides navigation buttons in the page sub-banner (gray area) and users can click the **Next** and **Previous** buttons to navigate between the steps, or they can simply click on any of the steps in the guided process.

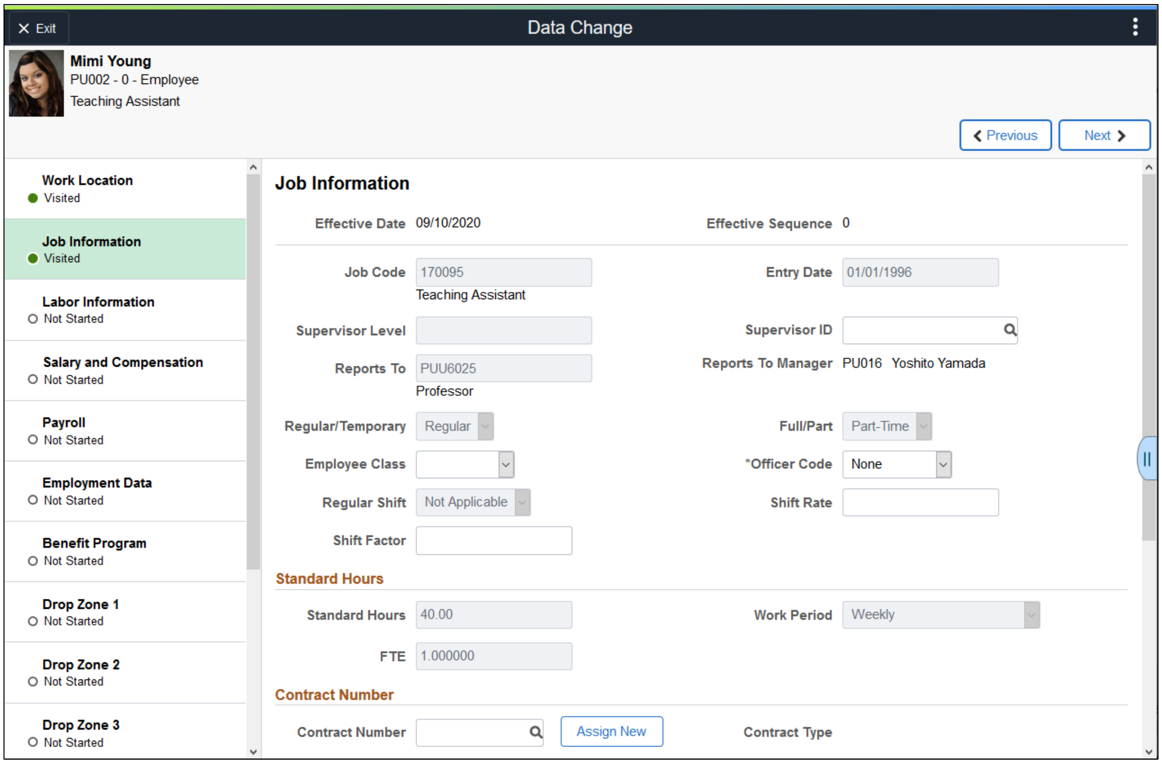
To understand or set up templates using the Activity Guide Composer, see the “Understanding the Activity Guide Composer” (Enterprise Components) documentation.

Note: You must be assigned the *Job Data AG Administrator* role to add or modify **Job Data** activity guide templates.

The following video provides an overview and demonstration of the Activity Guide Composer:

Video: PeopleSoft Activity Guide Composer

This example illustrates the layout for the Manage Job pages in Fluid.



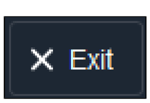
Note: Throughout this topic, the page illustrations show sections of the Job Data process without the context of the left panel activity guide step list. Even though the framework is not illustrated, remember that all steps appear within that framework.

Page Banner

The top of PeopleSoft pages is called the page banner.

When adding or updating an existing job data row, the banner will display the action - action reason you are performing. For example, when you are entering a promotion for outstanding performance, the page banner title will display *Promotion - Outstanding Performance*. This will be displayed as <Action> – <Reason> throughout this documentation.

In PeopleSoft applications, the banner displays several standard icon buttons. These standard set of banner icon buttons include:

Field or Control	***Description***
 Exit button	Click this button to exit the Manage Job data pages and return to the Job Actions Summary page without saving your data. The page will display a warning message confirming that you want to exit the page.

Job Data Header (Sub-Banner)

A gray area under the main page banner displays contextual information that is specific to the person, including the person's name, employee ID, job title, and photo.

Field or Control	***Description***
 Previous button	Click this button to navigate to the previous page. Navigating to another page does not save your data. The button is not visible on the first step in the request.
 Next button	Click this button to navigate to the next page. Navigating to another page does not save your data. The Review and Submit page does not display the **Next** button. Instead it displays a **Submit** button.
 Submit button	This button appears on the Summary page only. Click this button to save and submit the job data transaction. **Important!** Your job data will not be saved to the system until you click the **Submit** button. When approvals are required for updating or creating job data, the request will be sent to the approving managers, where they will use the Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page to take action on a job data request.

Left Panel Navigation

The page framework includes a left panel that lists the page tabs in the Manage Job Data process. Each step displays a status, which is either *Not Started* or *Visited*. Users can navigate to steps by clicking the page tab or using the navigation buttons in the header (sub-banner).

Note: The activity guide uses the Page and Field Configurator framework to hide or show page steps and fields based on the Action and Action Reason selected for this job data transaction. For more information on how to configure the pages, see the "Understanding Page and Field Configurator" (Enterprise Components) documentation.

Pages

The main panel displays the page for the current step in the transaction.

Note: For the discussion of the transaction page topics that follow, the page illustrations show the individual Job Data pages in Fluid without the context of the activity guide step list, although the system will display the left panel step navigation.

Field or Control	***Description***
<Title Text>	Displays a page title that includes the step name.

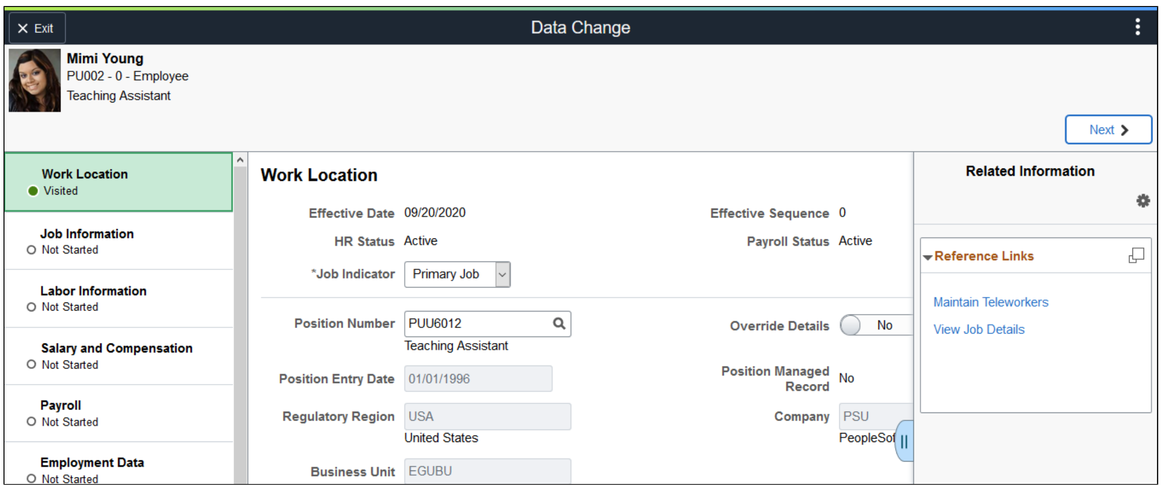
Supplementary Panel for the Manage Job Data Pages

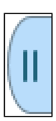
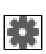
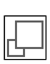
The Manage Job Data pages include a supplementary panel that provides access to related information.

Navigation:

Click the Supplementary Panel tab on any of the Manage Job Data pages.

This example illustrates the supplementary panel options for the Manage Job Data pages.



Field or Control	***Description***
 (Supplementary Panel) tab	Click this tab to open the Related Information panel and view related content.
 [Personalize RC (Related Content) icon]	This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.
 (Display <Related Content Item> in Modal Window icon)	This icon appears at the top of each individual related content item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the content.

Field or Control	*Description*
Related Information	For fluid Job Data, this supplementary pane includes the following links: • **Maintain Teleworkers** Click this link to open the Tracking Teleworkers pages in a new browser tab to track telecommuting information. • **View Job Details** Click this link to open the Job Details Page in a new browser window tab and view each job data rows from one page. This allows you to reference job data details while entering data for a new action. You can add additional links as needed.

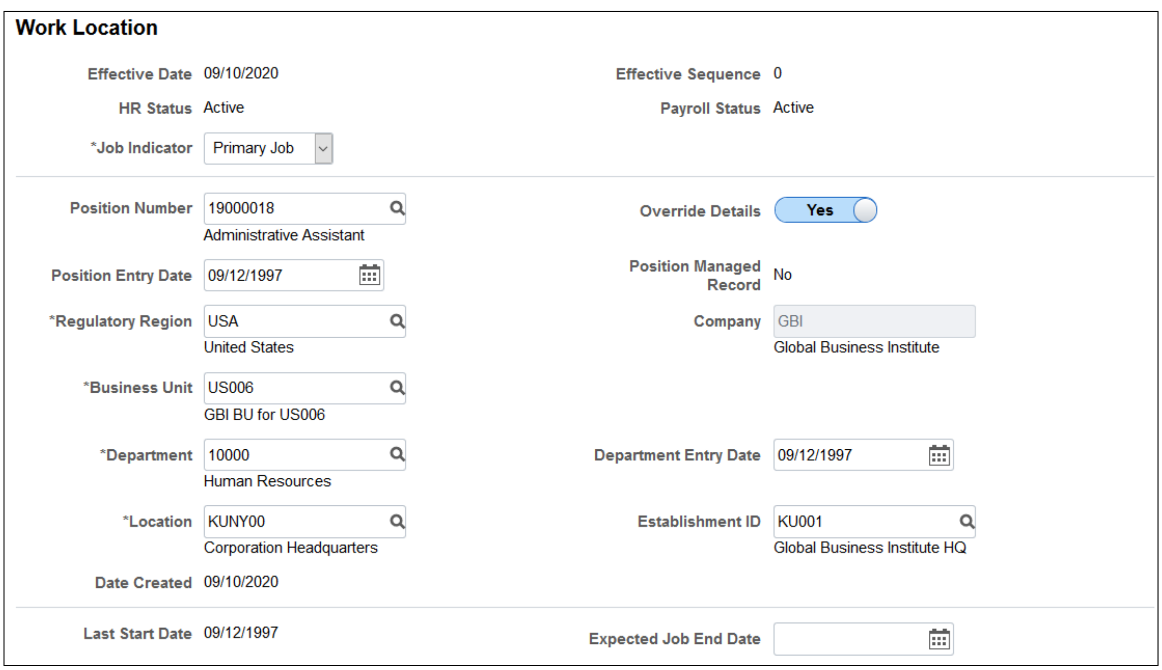
(Fluid) Work Location Page

Use the Work Location page in Fluid (HR_JOBDATA_WL_FL) to update position and location information for a person's job, including the regulatory region, company, department, and location.

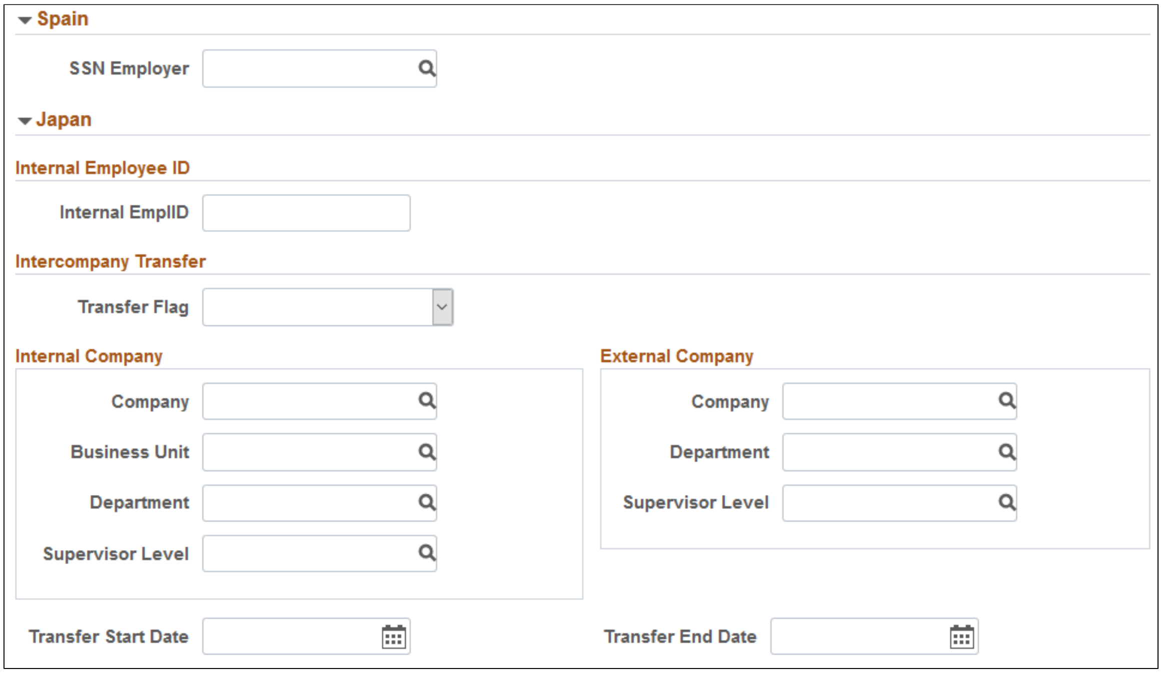
Navigation:

Select to add or edit a job row from the Job Actions Summary Page or select the appropriate tab from the left panel navigation steps.

This example illustrates the fields and controls on the Work Location page (1 of 2).



This example illustrates the fields and controls on the Work Location page (2 of 2).



The effective date, effective sequence, and <Action> – <Reason> (shown in the activity guide banner title) are entered on the Create Job Action Page.

For a list of field descriptions, see the Job Data Page - Work Location Section documentation.

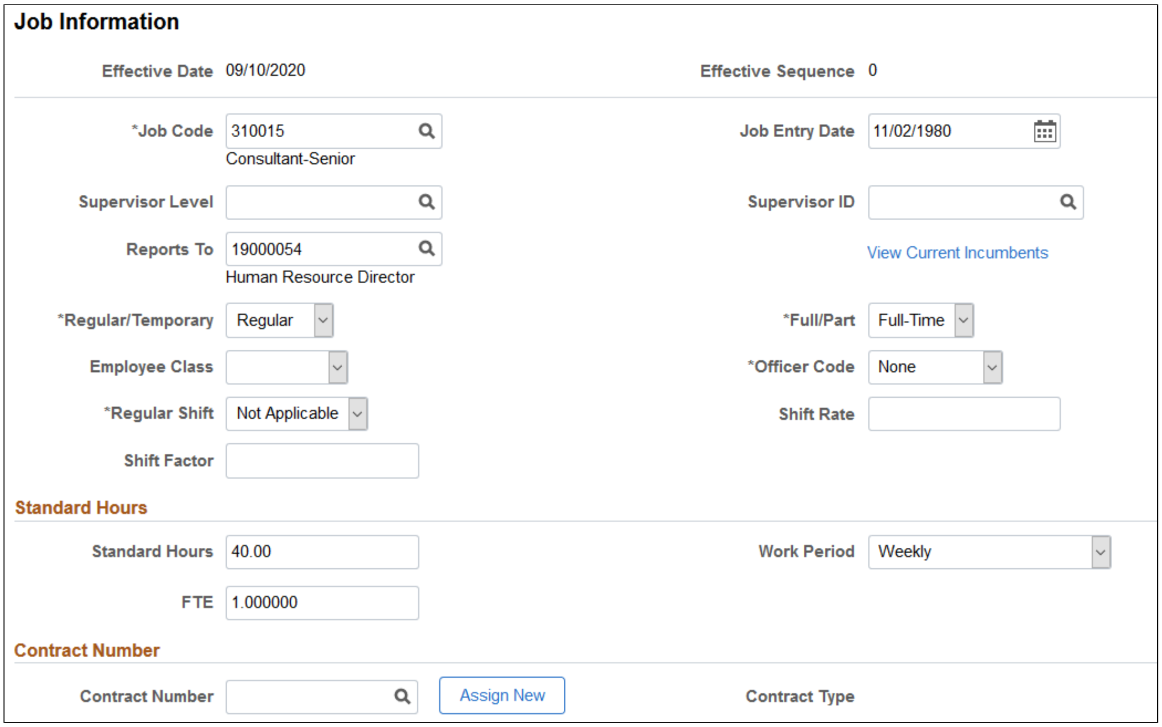
(Fluid) Job Information Page

Use the Job Information page in Fluid (HR_JOBDATA_JC_FL) to update information about a person's job, including status, employee class, shift, or standard hours.

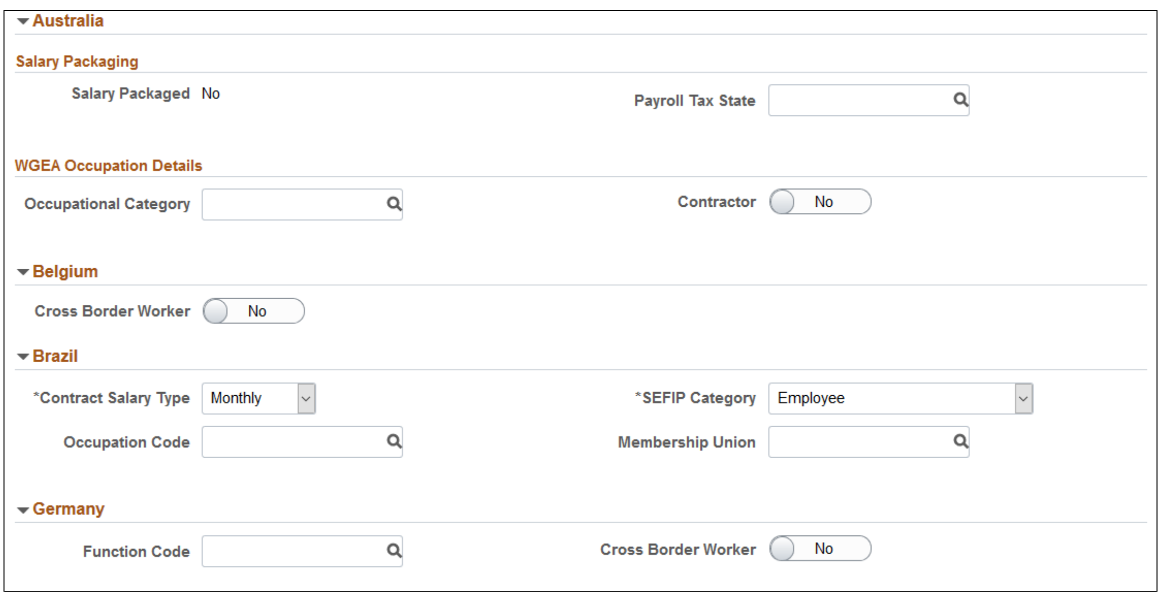
Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

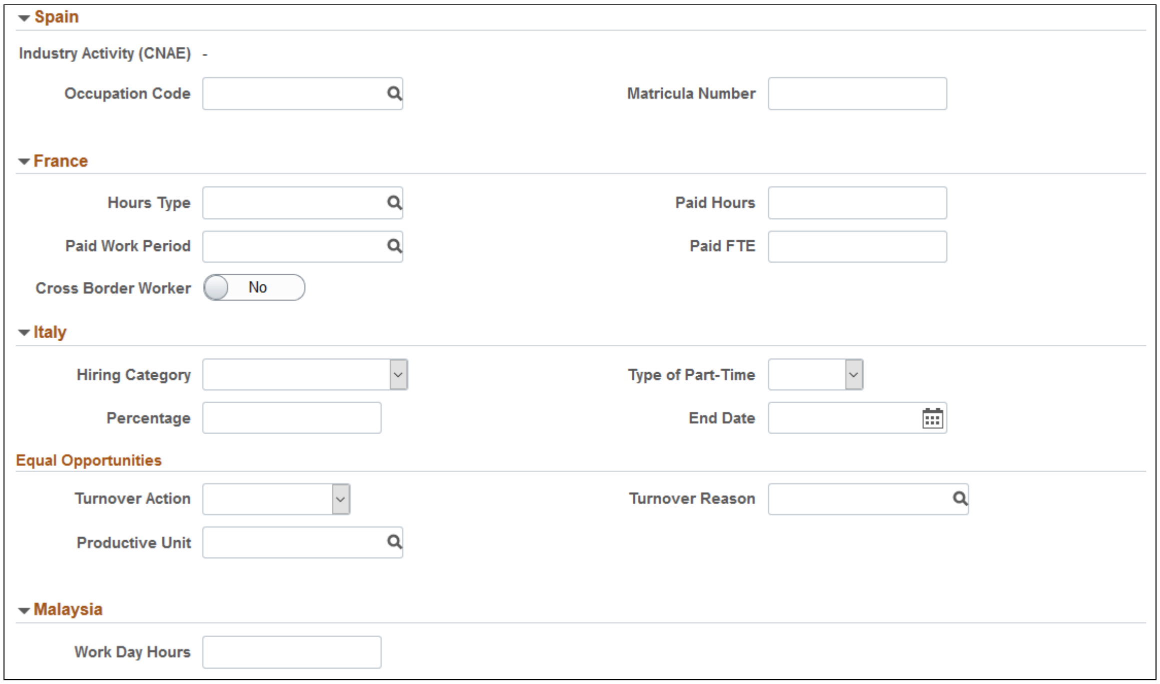
This example illustrates the fields and controls on the Job Information page (1 of 4).



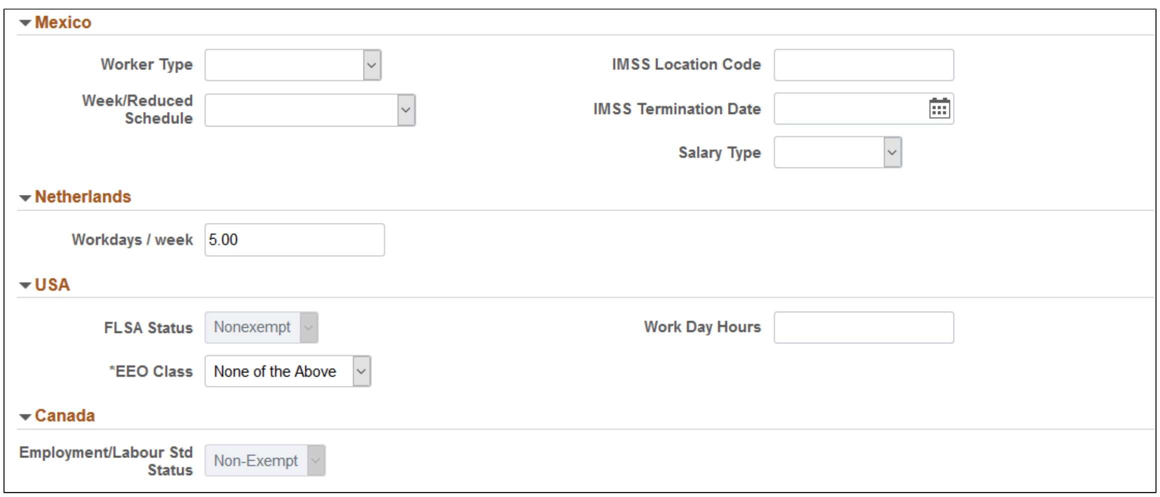
This example illustrates the fields and controls on the Job Information page (2 of 4).



This example illustrates the fields and controls on the Job Information page (3 of 4).



This example illustrates the fields and controls on the Job Information page (4 of 4).



For a list of field descriptions, see the Job Data Page - Job Information Section documentation.

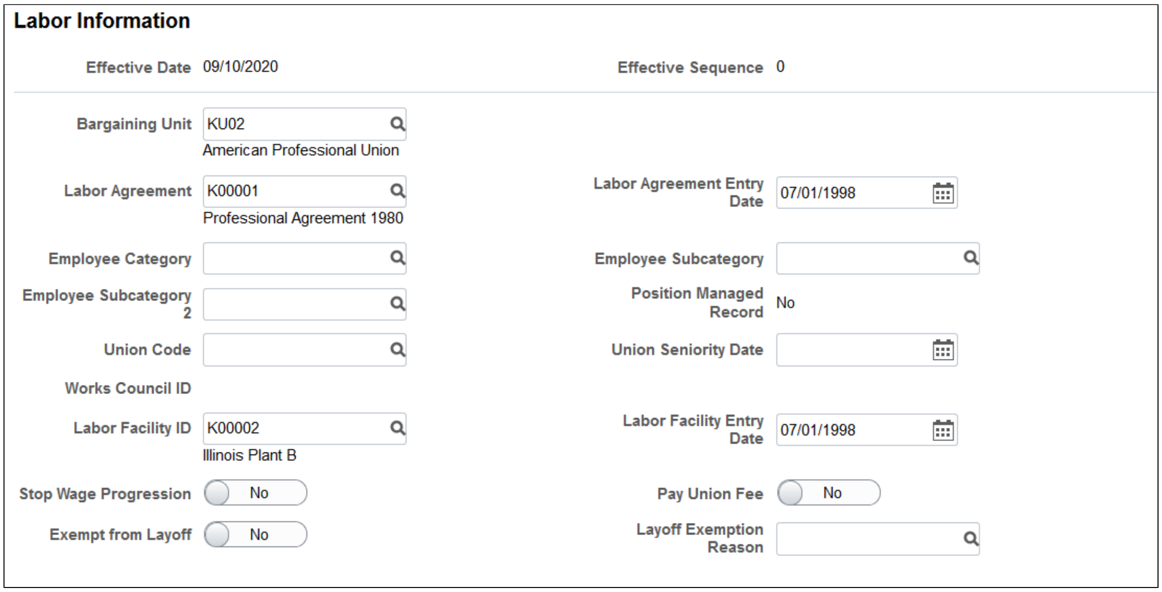
(Fluid) Labor Information Page

Use the Labor Information page in Fluid (HR_JOBDATA_JL_FL) to update National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.

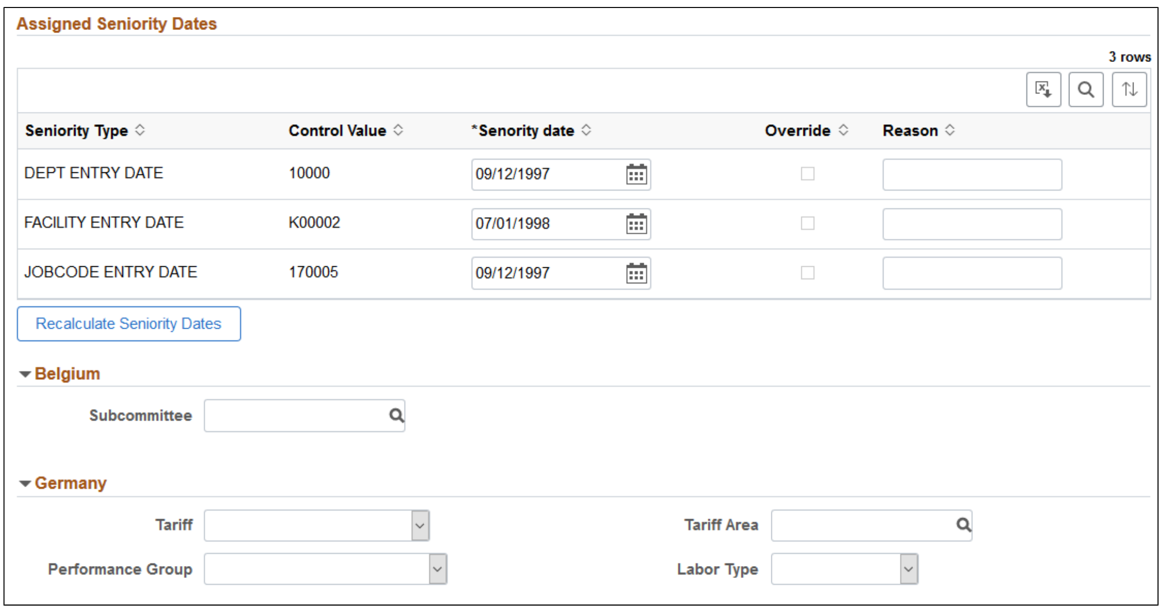
Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

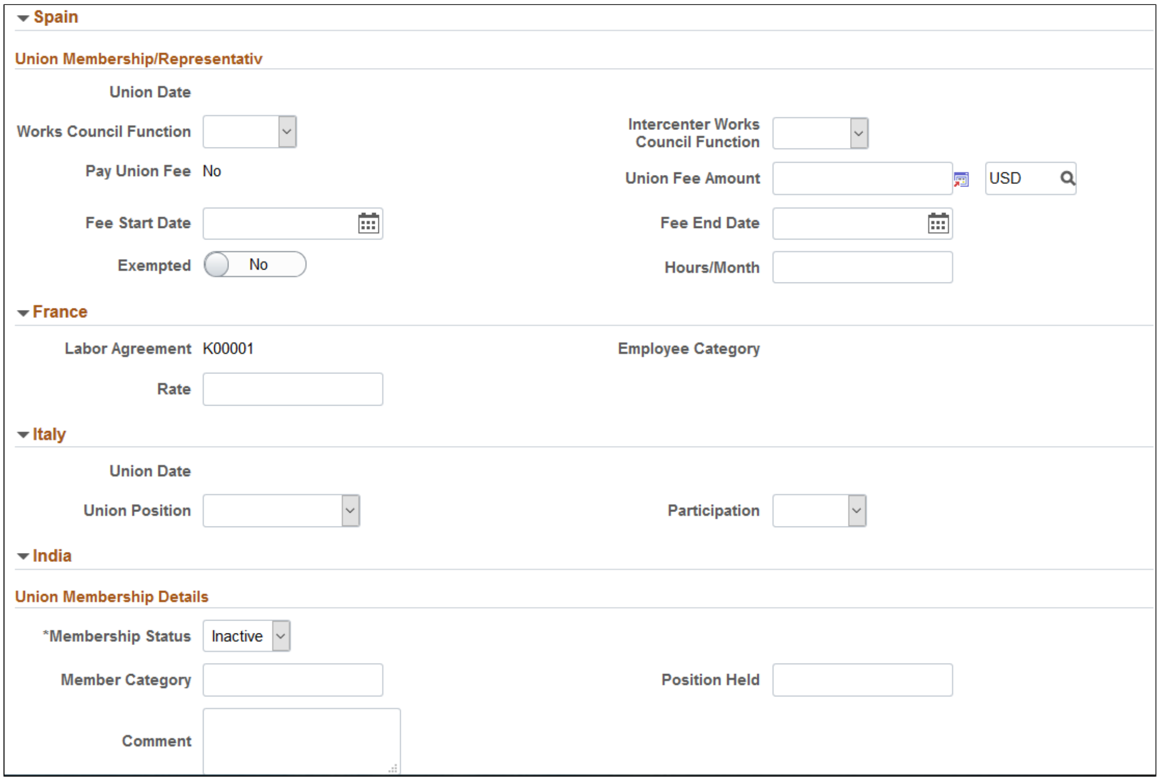
This example illustrates the fields and controls on the Job Labor page (1 of 3).



This example illustrates the fields and controls on the Job Labor page (2 of 3).



This example illustrates the fields and controls on the Job Labor page (3 of 3).



For a list of field descriptions, see the Job Data Page - Labor Information Section documentation.

Related Links

"Understanding Positions" (PeopleSoft Human Resources Manage Positions)

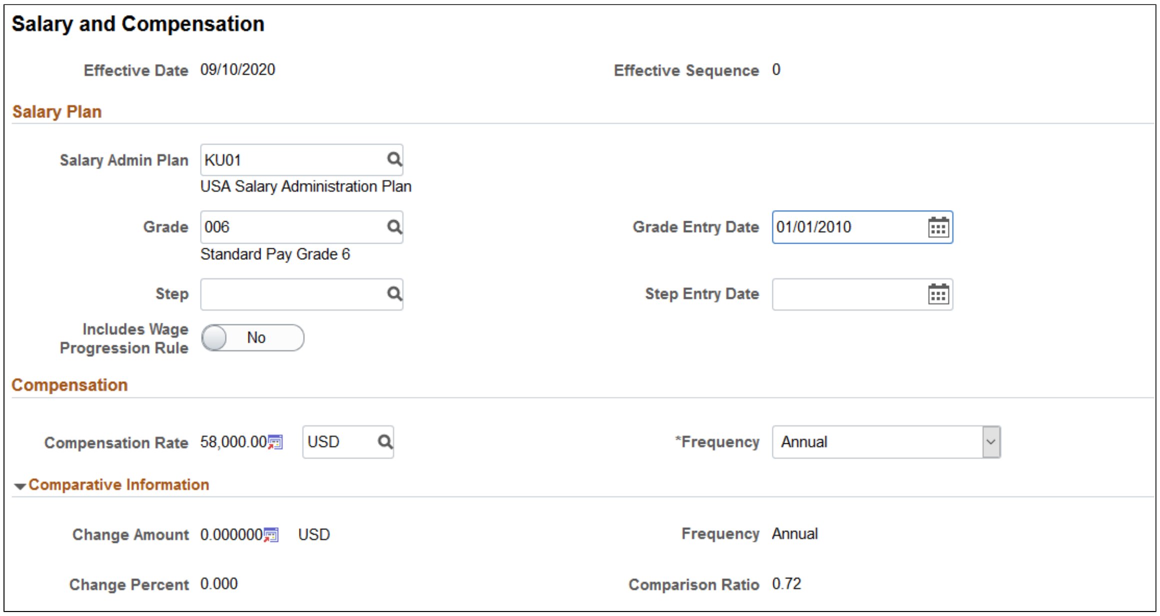
(Fluid) Salary and Compensation Page

Use the Salary and Compensation page in Fluid (HR_JOBDATA_SAL_FL) to update information about a person's salary plan and compensation information.

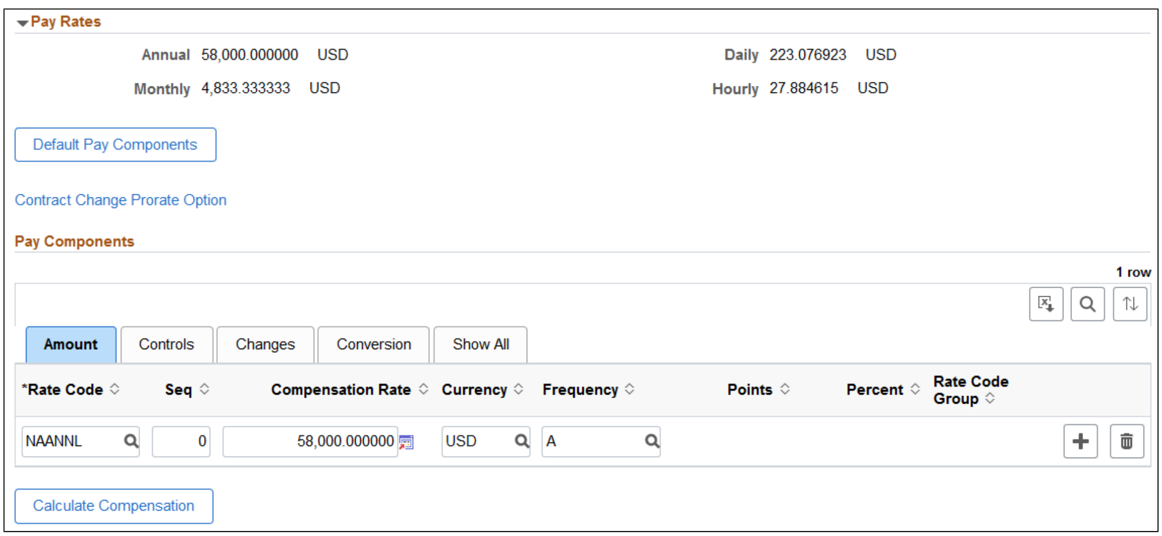
Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

This example illustrates the fields and controls on the Salary Plan page (1 of 2).



This example illustrates the fields and controls on the Salary Plan page (2 of 2).



For a list of field descriptions, see the Job Data Page - Salary and Compensation Section documentation.

(Fluid) Payroll Page

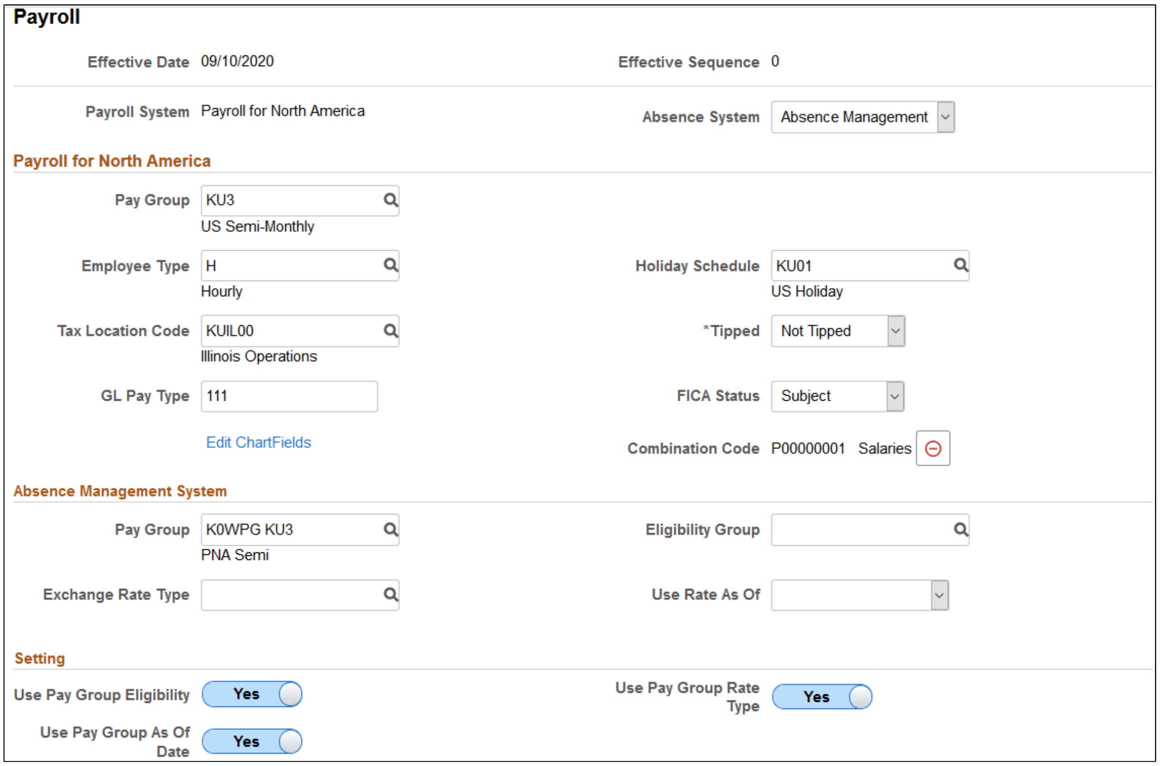
Use the Payroll page in Fluid (HR_JOBDATA_PAY_FL) to update payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Salary and Compensation page.

Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

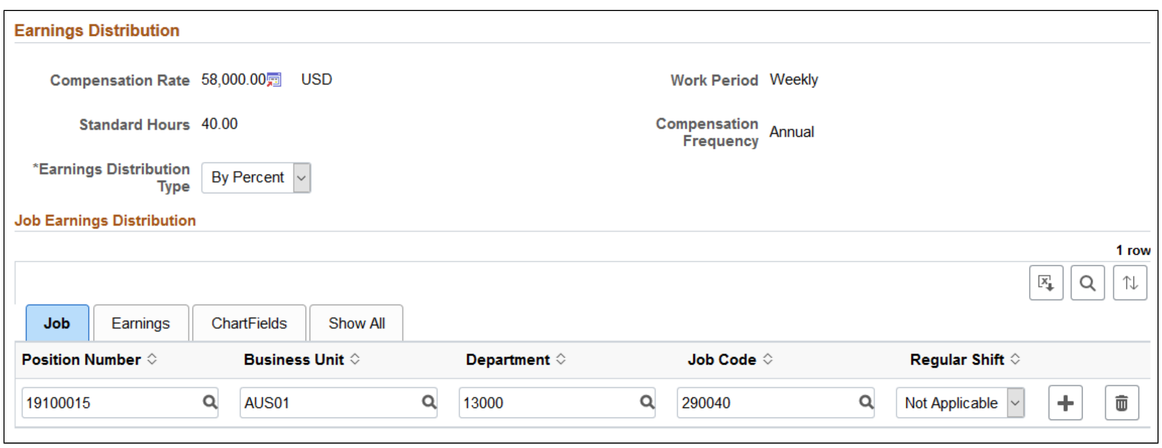
Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

This example illustrates the fields and controls on the Payroll page (1 of 2).



This example illustrates the fields and controls on the Payroll page (2 of 2).



For a list of field descriptions, see the Job Data Page - Payroll Section documentation.

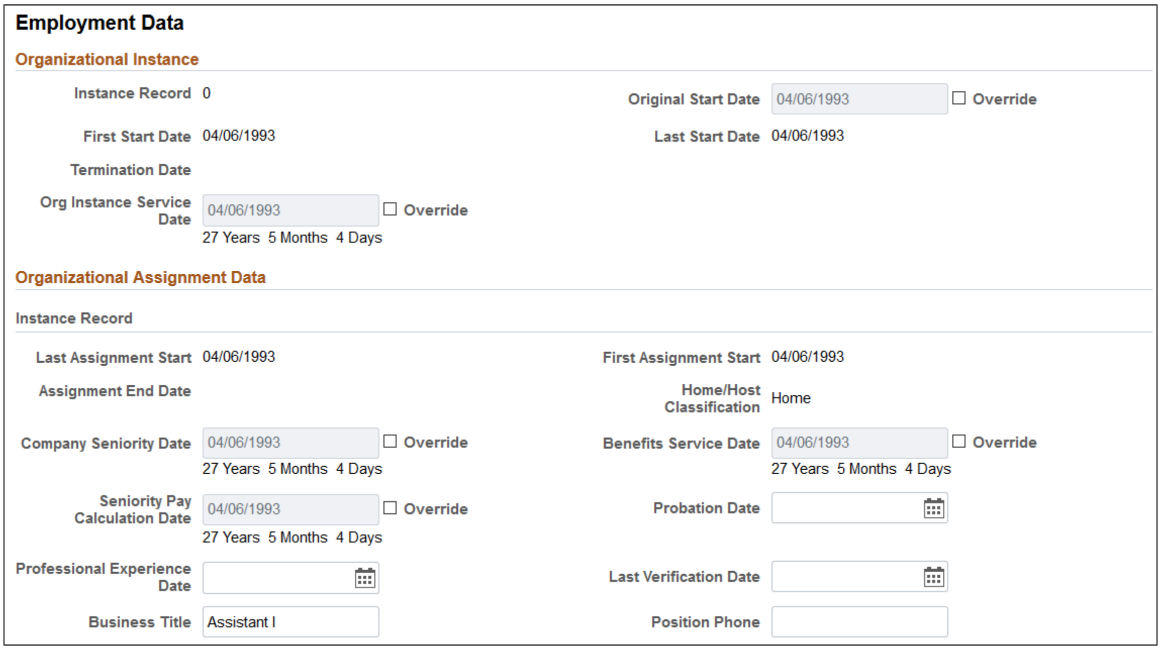
(Fluid) Employment Data Page

Use the Employment Data page (HR_JOBDATA_EMP_FL) to update optional employment data, such as a worker's business title.

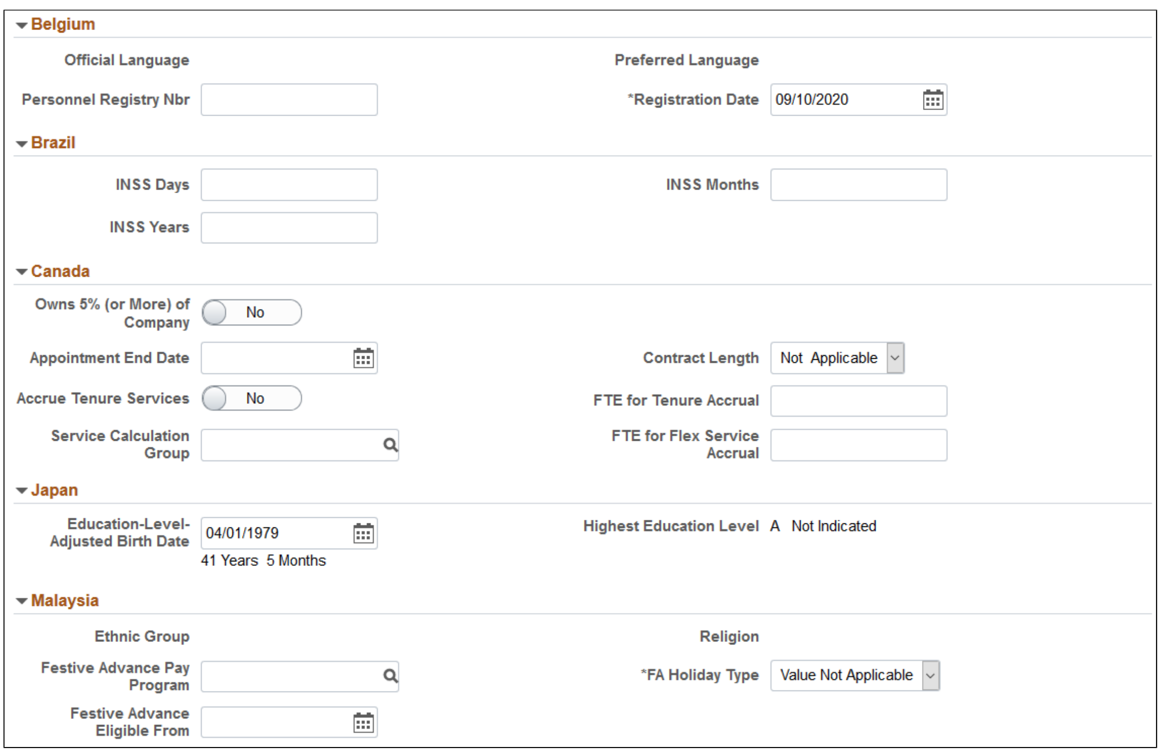
Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

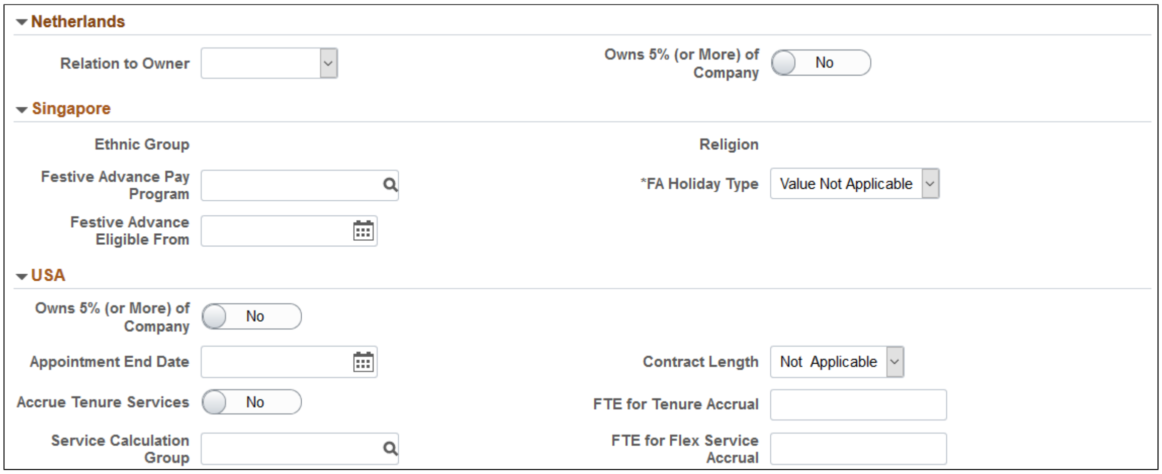
This example illustrates the fields and controls on the Employment Information page (1 of 3).



This example illustrates the fields and controls on the Employment Information page (2 of 3).



This example illustrates the fields and controls on the Employment Information page (3 of 3).



For a list of field descriptions, see the Job Data Page - Employment Data Section documentation.

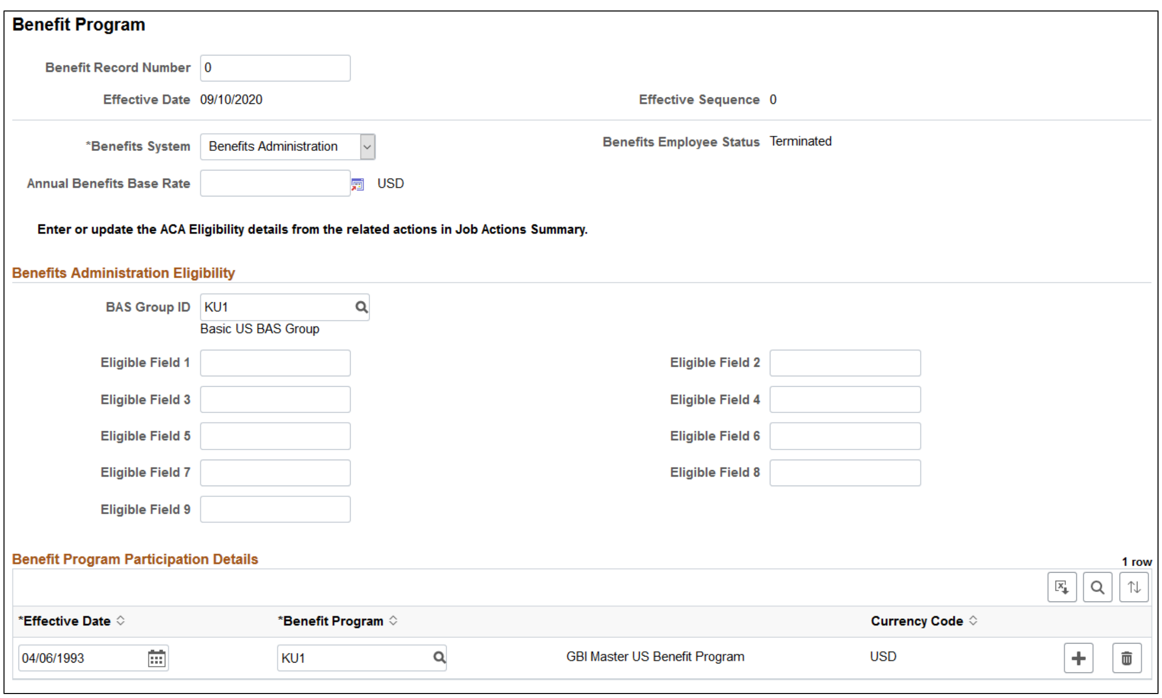
(Fluid) Benefit Program Page

Use the Benefit Program Participation page (HR_JOBDATA_BEN_FL) to update the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.

Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

This example illustrates the fields and controls on the Benefit Program Participation page.



For a list of field descriptions, see the Job Data Page - Benefit Program Section documentation.

Related Links

"Understanding the Core Tables for PeopleSoft Manage Base Benefits" (PeopleSoft Human Resources Manage Base Benefits)

(Fluid) <Drop Zone> Pages

Use the <Drop Zone> pages (HR_JOBDATA_DZ1_FL, HR_JOBDATA_DZ2_FL, HR_JOBDATA_DZ3_FL, HR_JOBDATA_DZ4_FL) to update custom steps that use drop zones embedded in your activity guide process.

Note: The HCM system delivers four Drop Zone pages that you can configure to add steps that are specific to your organization. Use the Activity Guide Composer to rename a page. To rename a Drop Zone field, you need to use the Drop Zone configuration setup. See "Understanding the Activity Guide Composer" (Enterprise Components) and "Understanding Drop Zones" (Application Fundamentals).
If you do not want to use the delivered Drop Zone steps in the activity guide, turn it off using Page and Field Configurator ("Understanding Page and Field Configurator" (Enterprise Components)).

Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

This video provides an overview of Drop Zones:

Video: PeopleSoft Drop Zones on Fluid and Classic Plus Pages

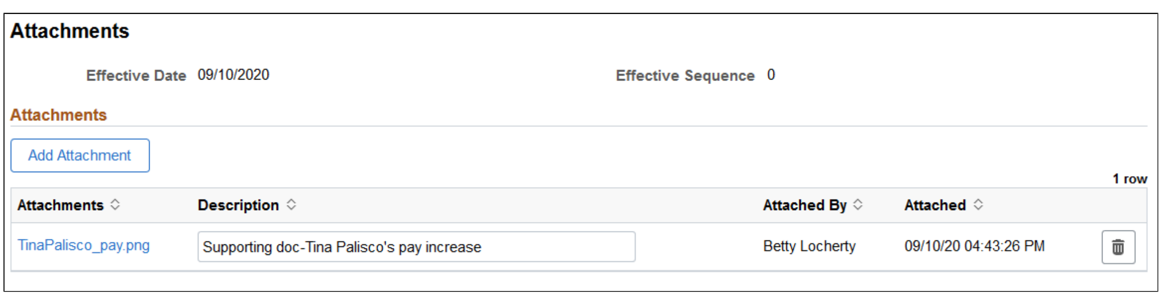
(Fluid) Job Data - Attachments Page

Use the Job Data - Attachments page (HR_JOBDATA_ATT_FL) to add or view attachments for a job data row.

Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the Attachments tab from the left panel navigation steps.

This example illustrates the fields and controls on the Attachments page.



For a list of field descriptions, see the Job Data Page - Attachments Section documentation.

Related Links

"Configuring Attachments in Fluid Framework" (Application Fundamentals)

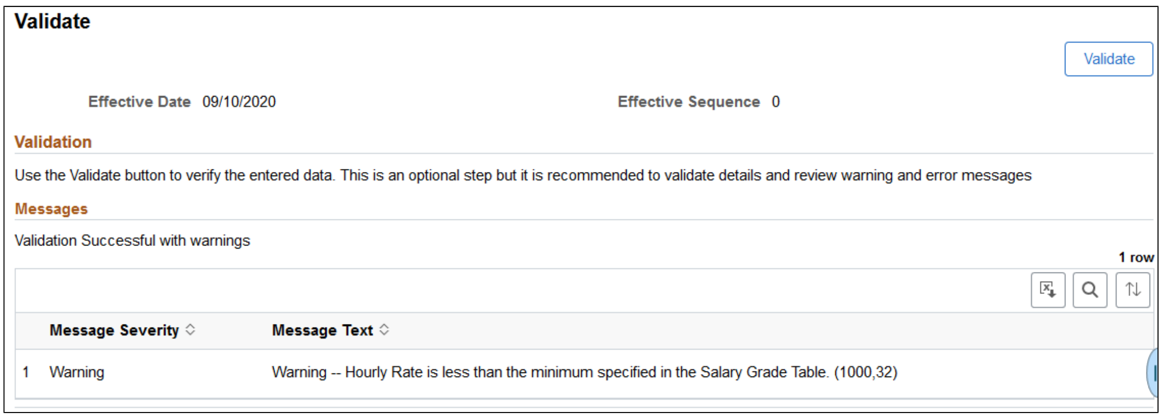
(Fluid) Validate Page

Use the Validate page in Fluid (HR_JOBDATA_VAL_FL) to verify the details you have entered during the course of the transaction.

Navigation:

After accessing the Manage Job component, click the **Previous** or **Next** button or select the appropriate tab from the left panel navigation steps.

This example illustrates the fields and controls on the Validate page when you are updating job data information.



Note: Although this step is not required before moving to the Summary step in the guided process, we recommend that you perform the validation to ensure cleaner data entry.

Field or Control	***Description***
Validate button	Select this button to displays errors or warnings, if any. This allows you to go back and fix information prior to submitting a transaction. Prior to selecting the **Validate** button, the Messages section displays that there are currently no exceptions to be displayed. When you click the button, the process triggers a test CI to pre-validate the data against the core Job validations and displays the errors. The Messages section is then updated to indicate if the process ran successfully and lists messages and their severity, if any.

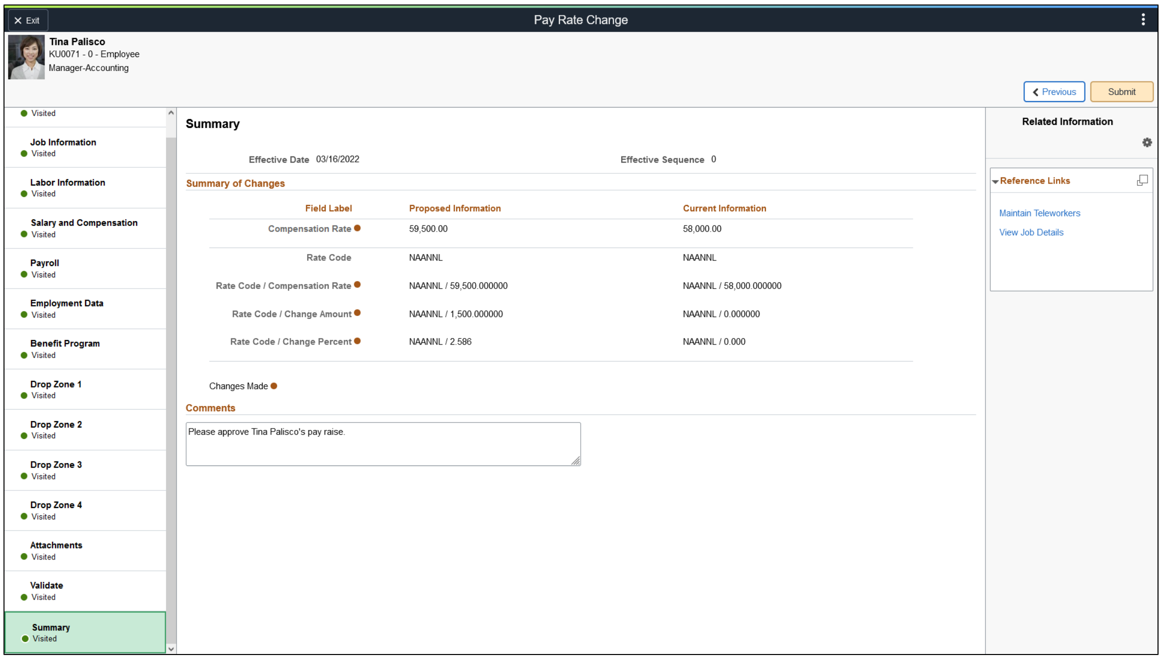
(Fluid) Job Data - Summary Page

Use the Job Data - Summary page in Fluid (HR_JOBDATA_TS_FL) to review a summary of the job row changes prior to submitting the transaction.

Navigation:

After accessing the Job Data component, click the **Next** button or select the Summary tab from the left panel navigation steps.

This example illustrates the fields and controls on the Job Data - Summary page when you are updating job data information.



Summary Of Changes

Use this section to review changes you have made to the job data. The page will display the proposed value side-by-side with the current value for the changed fields followed by an indicator.

PeopleSoft HCM delivers the Manage Job - Summary page with a pre-seeded configuration. Administrators can configure this page to hide or show fields, even those that were not changed using the Transaction Summary functionality. For more information on setting up this information, see the "Configuring Transaction Summary" (Application Fundamentals) documentation.

Comments

Enter comments related to this transaction row.

If approvals are enabled, the approver will be able to see the comments when reviewing the approval request on the Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page.

Comments are stored with the job row and are available to view by selecting the **Request History** option under the Summary section of the Job Details Page in fluid.

This video provides an overview of tracking comments:

Video: Image Highlights, PeopleSoft HCM Update Image 42: Track Requestor Comments with Job Data Modernization

Submitting a Transaction

Field or Control	***Description***
Submit button	The **Submit** button appears on this page only. Select this button to initiate the process to save and submit job data information you just entered. ***Warning!*** Your job data changes will not be saved until you submit the transaction. If you exit out of the Manage Job activity guide without submitting your changes, your data will be discarded. Click **Submit** to access the (Fluid) Job Data - Comments Page, where you will confirm you want to submit and complete the save and submission process.

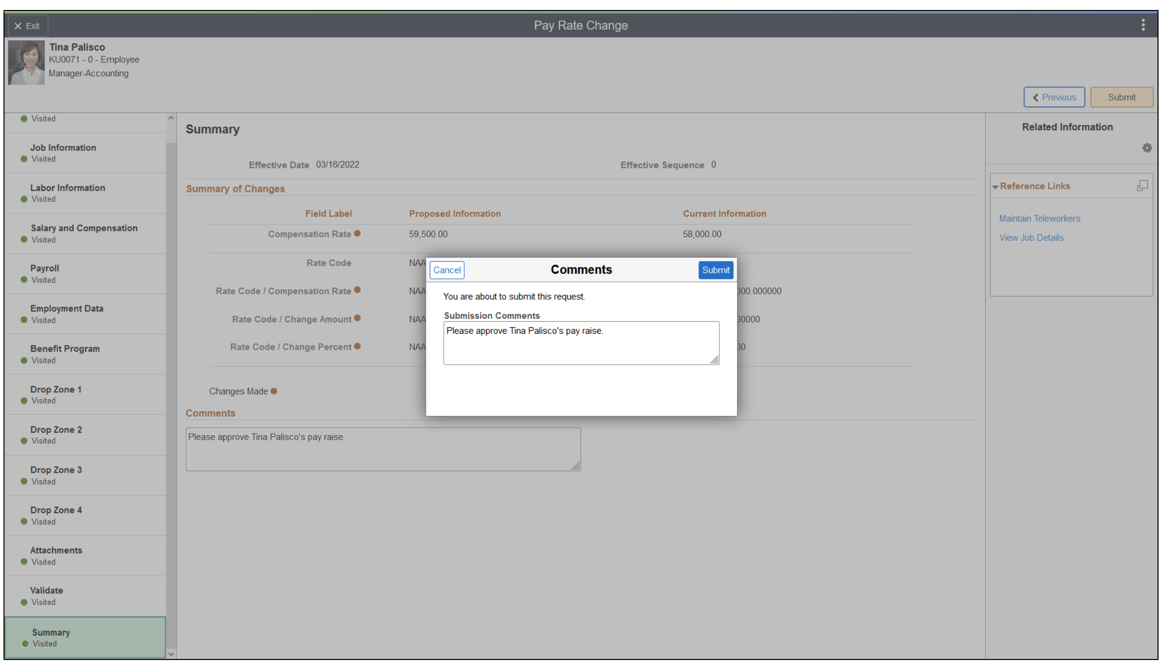
(Fluid) Job Data - Comments Page

Use the (Fluid) Job Data - Comments page (HR_JOB_COM_SCF) to add comments and finalize the submitting process for a Job Data change.

Navigation:

Click the **Submit** button on the (Fluid) Job Data - Summary Page.

This example illustrates the fields and controls on the Job Data - Comments page.



This final step in the fluid job data transaction process also includes the comments box to ensure remarks are not missed prior to submitting the job data change.

Field or Control	*Description*
Submission Comments	Enter comments about this job transaction row, if any. If you entered comments on the Summary page, they are carried forward to this page. If approvals are enabled, the approver will be able to see the comments when reviewing the approval request on the Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page. Comments are stored with the job row and are available to view by selecting the **Request History** option under the **Summary** section of the Job Details Page in fluid. This video provides an overview of tracking comments: Video: Image Highlights, PeopleSoft HCM Update Image 42: Track Requestor Comments with Job Data Modernization
Submit button	Select the **Submit** button to complete the submission process. If approvals are not enabled, the data will be saved to the HR system. When approvals are required for updating or creating a job row (see Person and Job Installation - Job Data Page), the request will be sent to the approving managers, where they will use the Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page to take action on a Mange Job data request. ***Warning!*** Your job data changes will not be saved until you click the **Submit** button. If you exit out of the Manage Job activity guide without submitting your changes, your data will be discarded. When a job data transaction has been successfully submitted, the system will display the (Fluid) Job Data - Submit Confirmation Page.

On the submission of a job data transaction requiring approvals, the approval chain will appear on the following pages:

- (Fluid) Job Data - Submit Confirmation Page.
- Job Actions Summary Page, under the related Actions column.

  Status values on the Job Actions Summary page reflect the statuses as applicable for approvals.
- Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page.

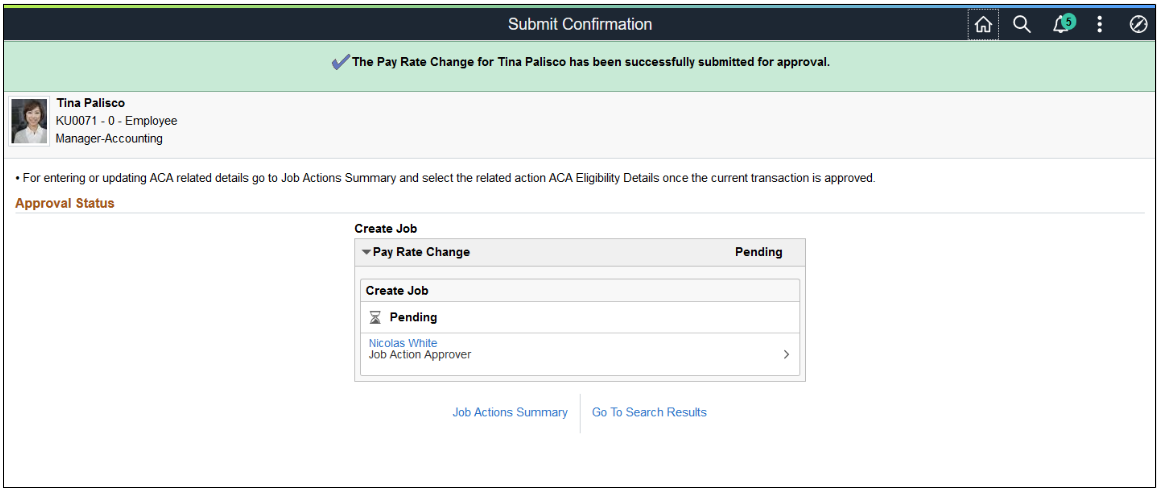
(Fluid) Job Data - Submit Confirmation Page

Use the Job Data - Submit Confirmation page (HR_JB_SUB_CNF_FL) to confirm that your job data updates have been submitted.

Navigation:

Click the **Submit** button on the (Fluid) Job Data - Comments Page.

This example illustrates the fields and controls on the Job Data - Submit Confirmation page.



When approvals are enabled, the message at the top of the page will indicate that it was submit for approvals and the approval status fields will show the approval status and approval chain of the request.

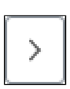
Field or Control	***Description***
Job Actions Summary link	Click this button to go to the Job Actions Summary Page for this person. You will see your newly created or update job transaction and it's status in the list.
Go to Search Results link	Click this button to return to Manage Job - Search Criteria page and search for other people (See Understanding the Manage Job - Search Criteria Page).

For job transactions that involve the Review Process, see the (Fluid) Working with the Job Data Review Process topic.

Job Details Page

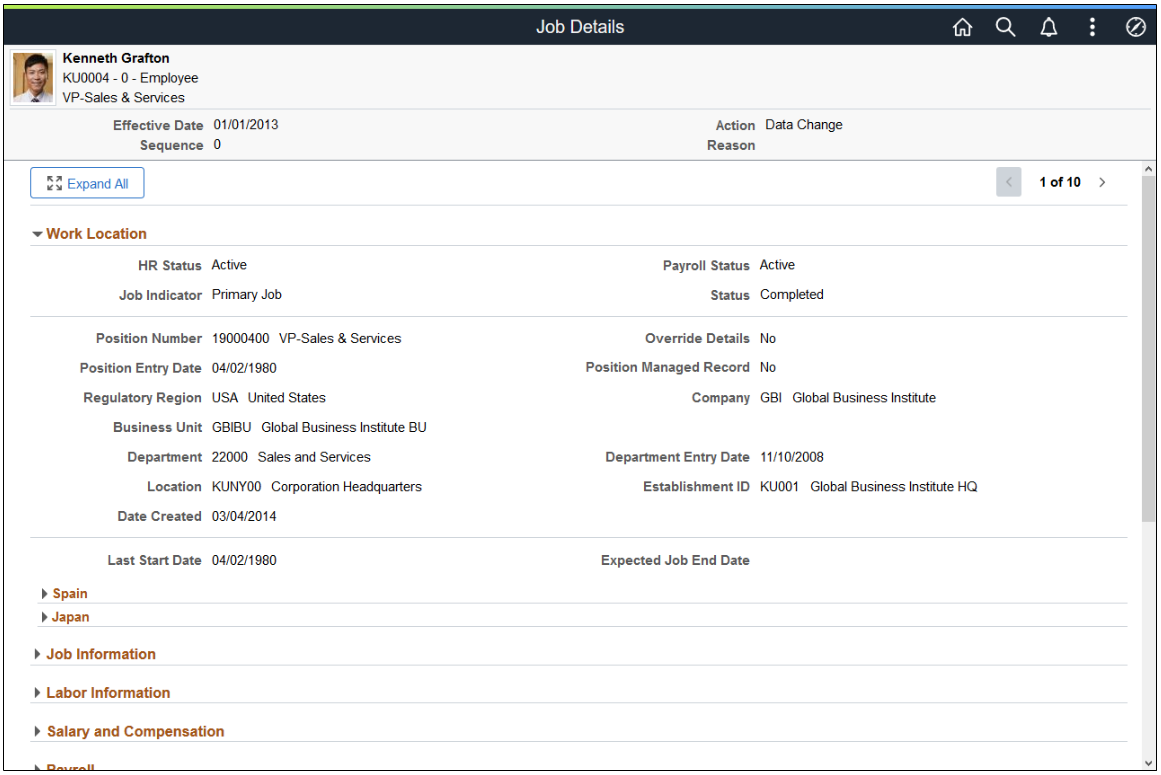
Use the Job Details page (HR_JOBDATA_VW_FL) to view a complete summary of the job data rows for a person by effective date.

Navigation:

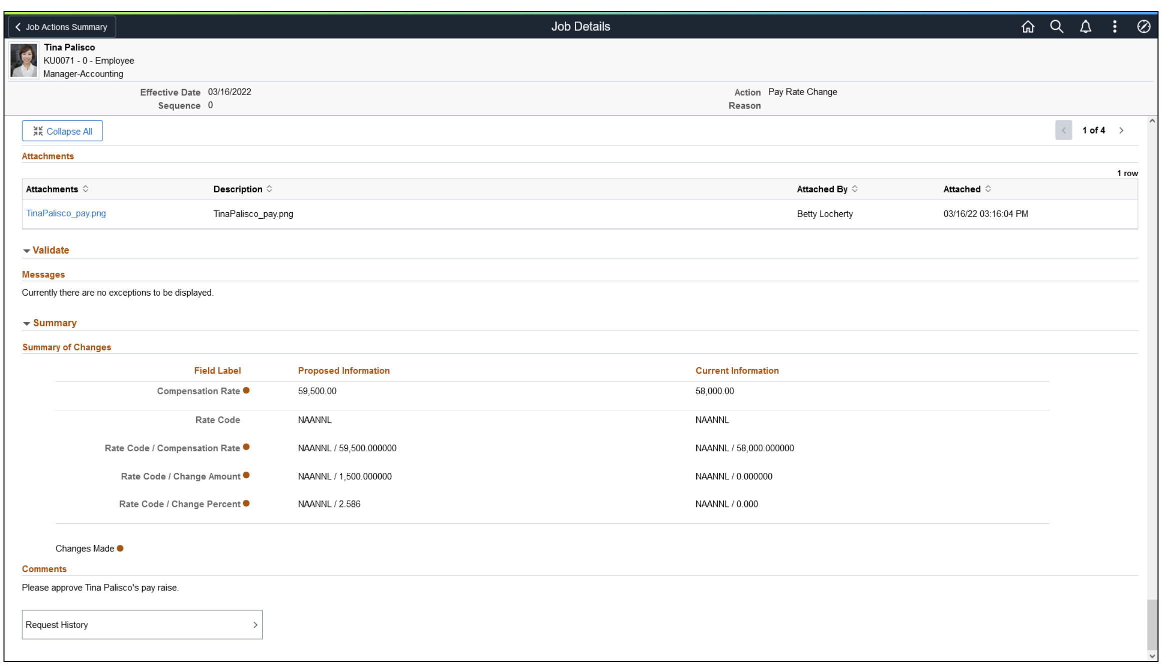
- Select the  (View Job Details) button from the Job Actions Summary Page.
- Select the **View Job Details** link from supplementary panel on any of the fluid Manage Job Data pages.

- Click the **View Job Details** link from the Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page.

This example illustrates the Job Details page.



This example illustrates the Job Details page, Summary section showing the Request History option



The Job Details header displays information about the employee, including the job data transaction row you are viewing. Use the previous and next scroll arrows to view other rows.

The page also shows all the sections and fields of the Manage Job Data pages, with the Work Location section expanded by default when you first access the page. Expand each section individually, or use the **Expand All** and **Collapse All** buttons, to view additional information.

Note: The Page and Field Configurator, which you can use to hide information in the guided process, does not change the visibility of sections and fields on this page. If needed, you can configure this page using the Page and Field Configurator to display information based on actions. See the Technical Brief for this feature for more information.

Field or Control	*Description*
Expand All or Collapse All sections buttons	Select these buttons to expand or collapse all the sections on this page.
< (previous) and > (next) buttons and row count	Use these buttons to scroll through all the effective dated rows for this person. A job data transaction summary of the row you are viewing will appear at the top of the page below the header.

Attachments section

If attachments are included with a row, select the Attachments link to view the attachment.

Summary section

The section will display the latest comment, if any, under the **Comments** subheading for the given job details row.

Field or Control	*Description*
Request History	Select this option to access the Request History Page and view all the comments for a job data row.

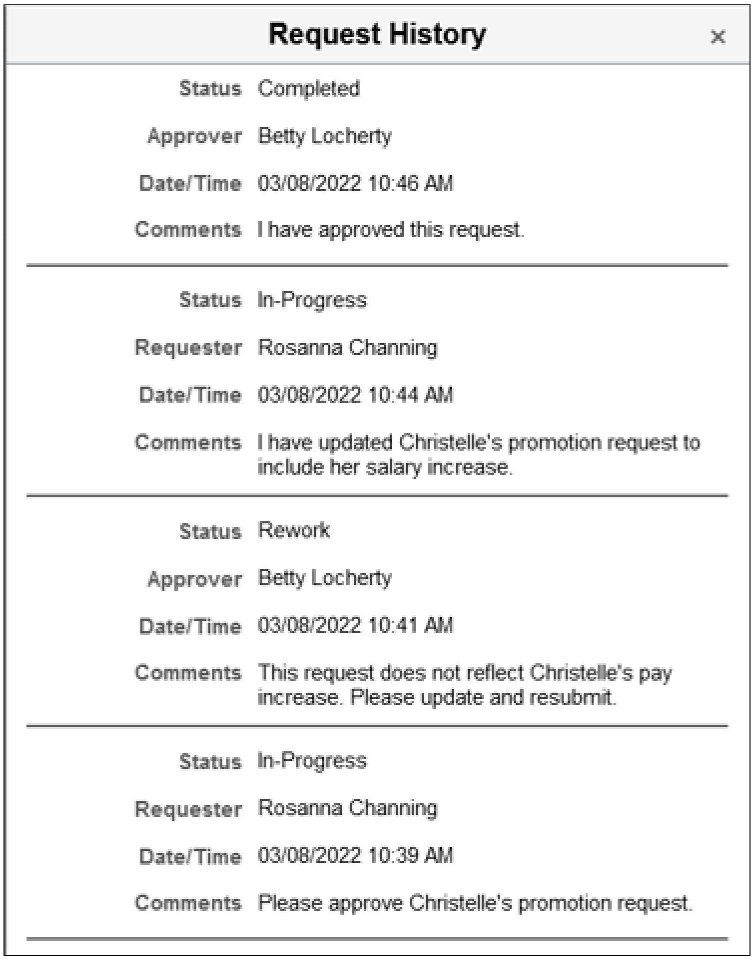
Request History Page

Use the Request History page (HR_REQ_HIST_SCF) to view all the comments related to a job data row.

Navigation:

Click the **Request History** option from the (Fluid) Job Data - Comments Page.

This example illustrates the Request History page.



Request history allows you to view all the comments pertaining to this job transaction request. Multiple comments may happen when the approver has pushed back a request and it has been resubmitted.

This video provides an overview of tracking comments:

Video: Image Highlights, PeopleSoft HCM Update Image 42: Track Requestor Comments with Job Data Modernization

(Fluid) Working with the Job Data Review Process

Fluid Job Data enables the HR administrator to activate the Review Process functionality. When this functionality is enabled, the review process warns the user that the changes made to older rows in a person’s job data may affect newer job data rows. For example, when a user makes corrections to an older job data row, or when the user adds a retroactive row.

Related Links

Person and Job Installation - Job Data Page

Submitting a Retroactive or Corrective Job Data Transaction Using the Review Process

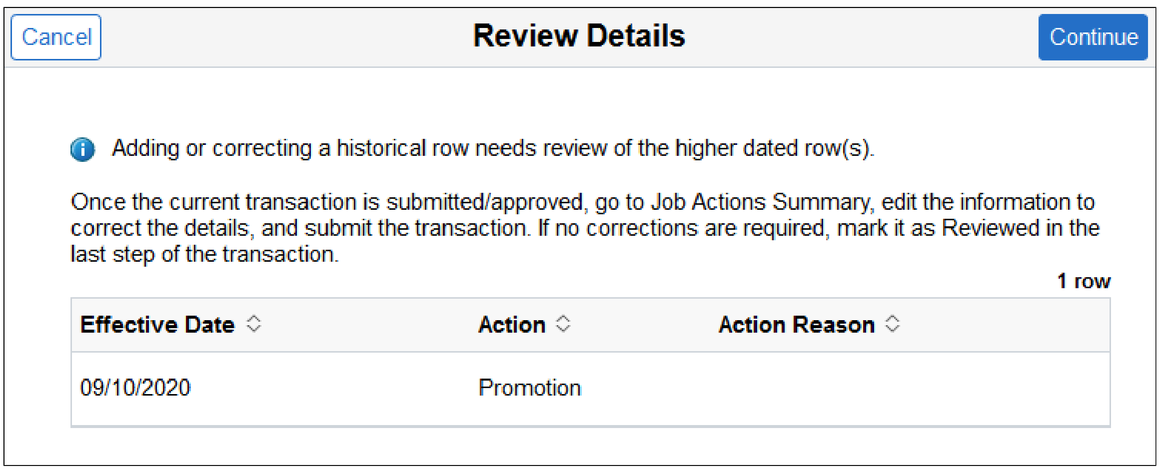
With the Review Process enabled, the system goes through the following series of steps to notify you to review all transaction rows that may be impacted by any job data change.

1. When you first create a retroactive row or correct any row that predates another row on the Job Actions Summary page, the system will present the Review Details page.

   Use the Review Details page (JOB_REQ_RETRO_SCF) to identify potentially impacted rows due to the addition of new or updated job data rows.

   Note: The **Review Process (Corrective and Retroactive)** must be selected on the Job Data Installation table for this page to appear.

   This example illustrates the fields on the Review Details page.

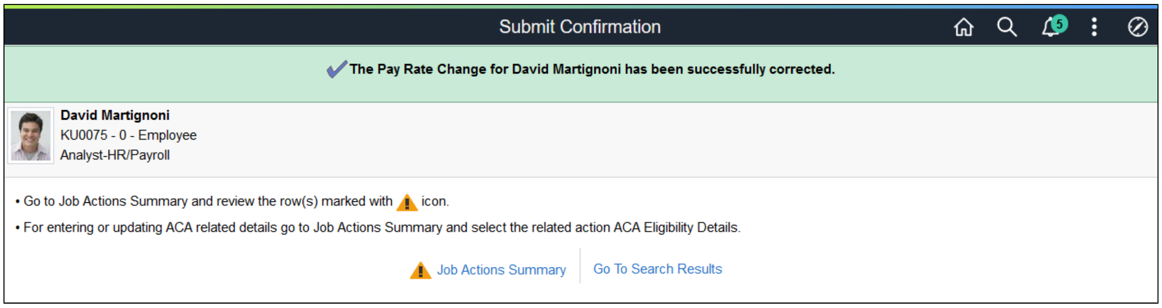
   

   The page will list all higher dated rows that may be impacted by changes to an older row or from a new row that predates these rows.

   Click **Continue** to move to the fluid Manage Job Data activity guide process.

2. After you enter the data in the Manage Job Data pages and submit the transaction, the Submit Confirmation page appears. When the review process is enabled and you have rows that need to be reviewed, the system will display an indicator on this page next to the Job Actions Summary link, indicating that you need to review higher effective dated rows.

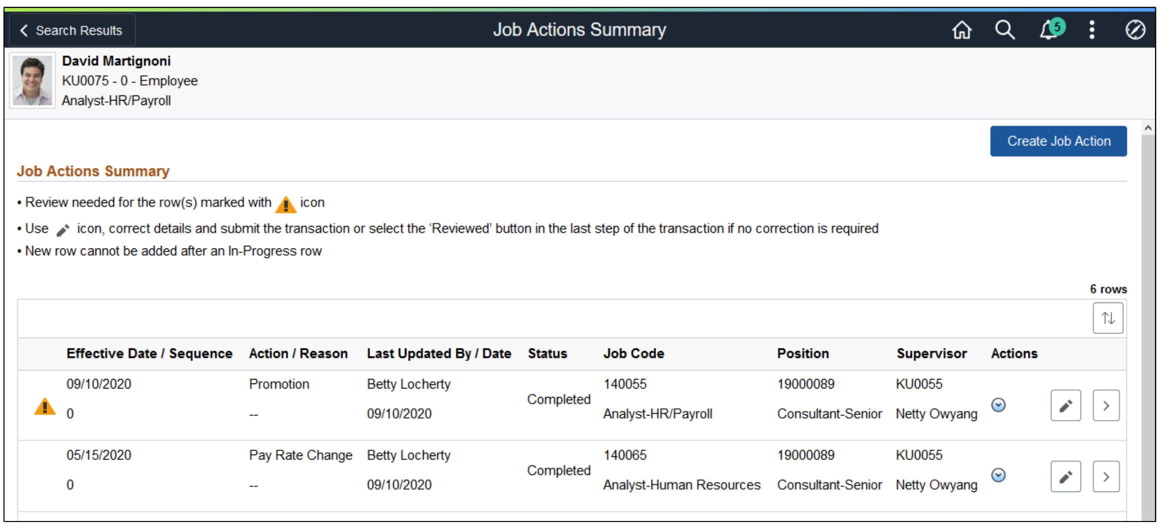
This example illustrates the Submit Confirmation page when you corrected a row and higher effective dated rows exist that need to be reviewed. In this screen shot example, approvals were not required.



3. Access the Job Actions Summary page to view effected job data rows. The page will display a warning indicator next to all potentially affected rows that are higher than the row being edited (correction) or added (retroactive).

Note: These indicators will remain until the review process is complete.

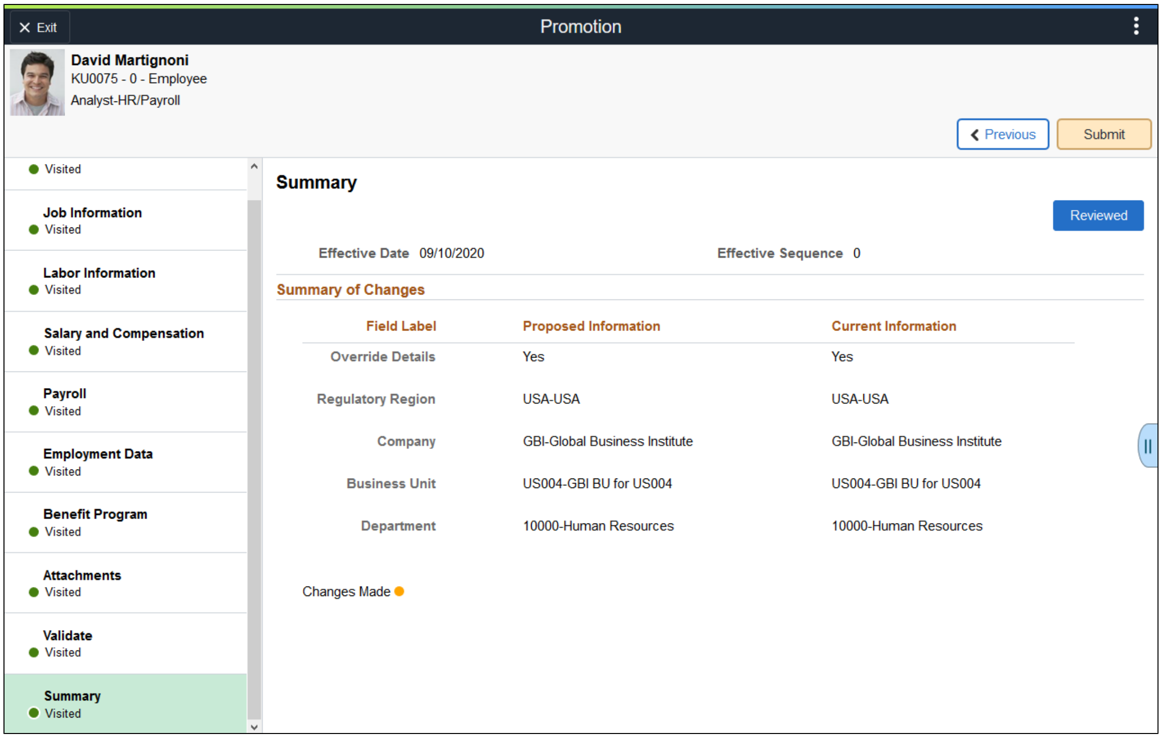
This example illustrates the Job Actions Summary page when you have higher effective dated rows that need to be reviewed.



4. To complete the review process, you must access each job data row (for historical rows, you will need to use Correct History mode) to update each of the potentially affected rows. Make any changes to the higher rows to bring your rows into sync, and click the **Submit** button.

   If no changes are required, click the **Reviewed** button on the last step to indicate that the transaction has been reviewed and does not need any changes. After you click the **Reviewed** button, you can successfully exit from the activity guide process. You will be returned to the Job Actions Summary page and the warning icon for that job data row will be cleared.

This example illustrates the Job Actions Summary page when you have higher effective dated rows that need to be reviewed.



5. Repeat the process to review or update all rows that display a warning icon.

Related Links

Job Actions Summary Page

(Fluid) Job Data - Summary Page

(Fluid) Using Fluid Approvals to Manage Job Data Requests

This topic describes how to approve Manage Job data requests using Fluid Approvals.

Fluid Approvals supports the following *Manage Job* approval transaction types:

- *Create Job*: When a user has created a new job record for a person.
- *Correct Job*: When a user has corrected an existing job record for a person.

For using the common Pending Approvals and Approvals History pages, see also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

This video provides an overview of Fluid Approvals:

Video: PeopleSoft HCM Fluid Approvals

Related Links

Understanding Fluid Person and Job Data

Pages Used to Approve Job Data Requests Using Fluid Approvals

Page Name	***Definition Name***	***Usage***
Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page	EOAWMA_TXNHDTL_FL	Review and take action on Manage Job data requests.
Job Details Page	HR_JOBDATA_VW_FL	View a complete summary of the job data rows for a person by effective date.
View Exception(s) Page	HR_JOB_CIEXCEPT_FL	View component interface errors or warnings for this job data request.
Attachments Page	HR_JOBDATA_ATT_SCF	View attachments linked to a job data request.
Request History Page	HR_REQ_HIST_SCF	View all the comments related to a job data row.

Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page

Use the Pending Approvals - Create Job or Pending Approvals - Correct Job page (EOAWMA_TXNHDTL_FL) to review and take action on Manage Job data requests.

Note: You must be assigned the *HR Admin Approver Fluid* or *HR Admin Correction Apvr Fluid* role to access this transaction.

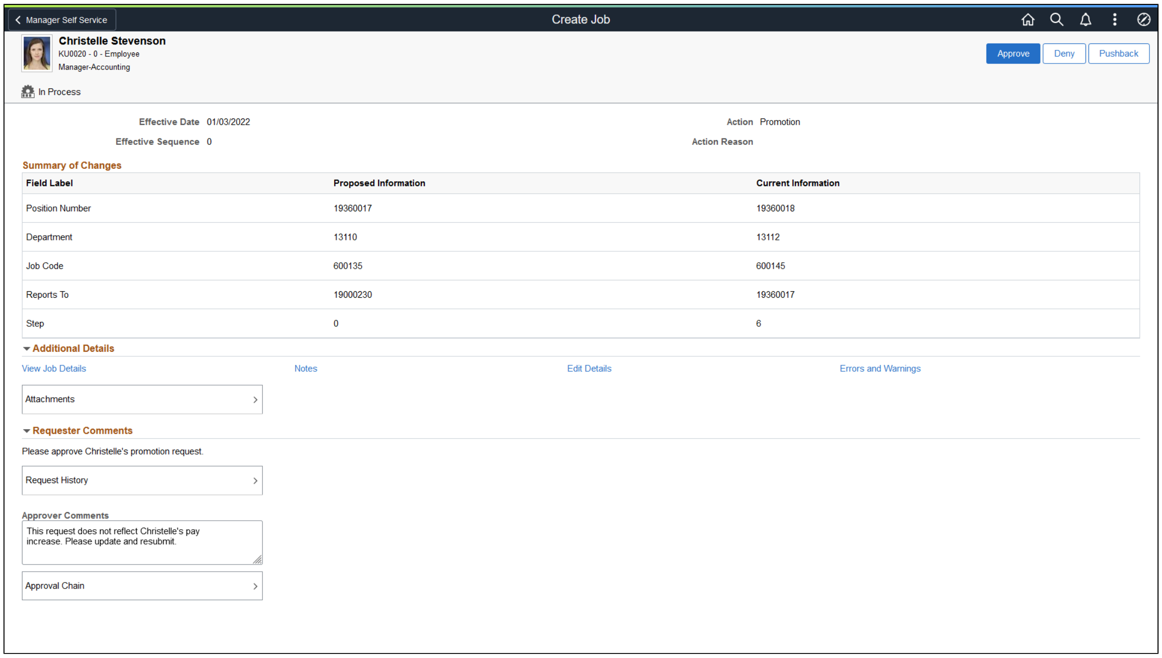
Navigation:

- Click the Approvals tile on the Manager Self Service home page to access the Pending Approvals page. Then click either a *Create Job* or *Correct Job* transaction row on the Pending Approvals page.

Note: These job transactions are listed under the *Manage Job* view by type.

- Click the Notifications button in the banner or view the Notifications side panel and select the appropriate approval notification.

This example illustrates the fields and controls on the Pending Approvals - Create Job page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

Field or Control	*Description*
Approve , **Deny**, and **Pushback**	Use these buttons to take action on the requested approval. The following happens when you selected one of these approval options: • *Approve*: When those in the approval chain have approved the request, the status will be changed to *Completed* on the Job Actions Summary page. The user can create a future dated row and send for approval. • *Deny*: The request will be terminated and the status on the Job Actions Summary will be changed to *Denied* or *Correct-Denied*. A new request will need to be created to submit a job change. • *Pushback*: The request will be sent back to the submitter and the status on the Job Actions Summary page will be changed to *Rework*. The requestor can make changes to the job row and resubmit the request for approval. The user cannot create a future dated row. Although entering a future dated row may be dependent upon the status or action taken on a current job request, the user can insert historical rows into the person's job record regardless of the action taken on this request. See also Understanding Job Actions Summary Statuses and the Approval Process for an understanding of how the approval response impacts the job status.

Summary of Changes

This section is available when field changes have been made to the person's job record or configured to display through the Transaction Summary pages (see "Configuring Transaction Summary" (Application Fundamentals)).

Use this section to view summary information identifying the fields that were updated in the transaction that you are being asked to approve. The section will show proposed changes requested for the person's job record next to the person's current values.

Additional Details

Field or Control	***Description***
View Job Details link	Click this link to open a new browser window tab to access the Job Details Page, where you can review details about the person's job rows from one page. **Note:** The approver must have access to the Job Details page to review this information.
Notes link	Click this link to open a new browser window tab and access the Job Data Notepad page where you can view or update notes for this job transaction.
Edit Details link	This link is available for the final approver in the approval chain when given the *HR Admin Correction Apvr Fluid* or *HR Admin Approver Fluid* role. It is also recommended that you assign this user the *Job Data AG Administrator* role. Click this link to access the fluid Manage Data component in fluid (see (Fluid) Updating Job Data), where you can make updates to the job record, if needed. Note that you will have access to all the steps in the Job Data activity guide process to ensure all necessary edits and errors are corrected. You will be returned to the approval pages where you will see your changes. You will need to approve the request for these changes to take place. This video provides an overview of edit capabilities: Video: Image Highlights, PeopleSoft HCM Update Image 48: Fluid Person Data Edit Capabilities for Approver
Errors and Warnings link	Click this link to access the View Exception(s) Page to review CI exceptions. When CI exceptions exist, you will be directed to the Job Data pages to review the information. When there are no exceptions, the page will produce a message notifying you that no exceptions exist.
Attachments	Click this item to open the Attachments Page where you can review the attachments associated with this job transaction.

Requester Comments

The section will display the latest comment associated with this request, if any, under the **Comments** subheading. Previous comments can be viewed by selecting the **Request History** item.

Field or Control	***Description***
Request History	Select this option to access the Request History Page and view all the comments pertaining to this transaction request. Multiple comments may happen when the approver has pushed back a request and it has been resubmitted.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

This video provides an overview of tracking comments:

Video: Image Highlights, PeopleSoft HCM Update Image 42: Track Requestor Comments with Job Data Modernization

Related Links

Job Actions Summary Page

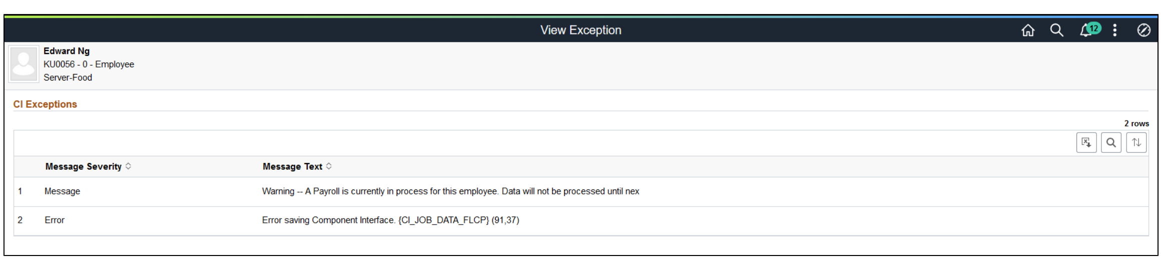
View Exception(s) Page

Use the View Exception page (HR_JOB_CIEXCEPT_FL) to view component interface errors or warnings for this job data request.

Navigation:

Click the **Errors and Warnings** link on the Pending Approvals page.

This example illustrates the View Exception page.



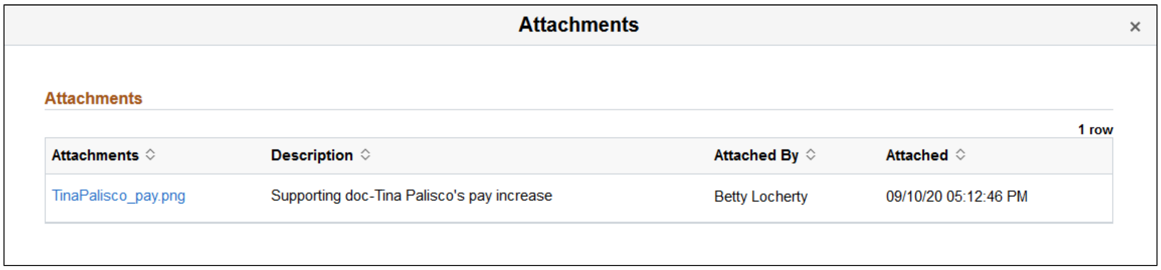
Attachments Page

Use the Attachments page (HR_JOBDATA_ATT_SCF) to view attachments linked to a job data request.

Navigation:

Click the Attachments item row on the Pending Approvals - Create Job page or Pending Approvals - Correct Job page.

This example illustrates the Attachments page.



Click the Attachments link to download and view an attachment using fluid. Note that attachments are not accessible from the classic pages.

The following video provides an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

Changing and Deleting IDs

These topics provide an overview of ID modification and discuss how to change and delete IDs.

This video demonstrates the data privacy enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 25: Data Privacy Enhancements

Pages Used to Change and Delete Employee IDs

Page Name	***Definition Name***	***Usage***
Person ID Change Page	RUNCTL_ID_CHANGE	Modify person IDs.
Person ID Delete Page	RUNCTL_ID_CHANGÈ	Identify person IDs to be removed from the system and run the process.
Person ID Change/Delete Log Page	HR_PER502_LOG	View a log that lists which rows of data were affected when you changed or deleted an ID.

Understanding ID Modification

IDs are the means by which you identify employees, contingent workers, and people of interest throughout PeopleSoft Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your data.

To help you keep accurate records, you can change or delete IDs. Though you rarely need to do this, it is necessary in cases where you entered a person ID in error or where you no longer need an ID.

Important! The Person ID modification process changes the ID in every record where PeopleSoft Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, it is recommended that you delegate this responsibility to your system administrator.

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

“Restricting the Deletion of IDs” (Application Fundamentals)

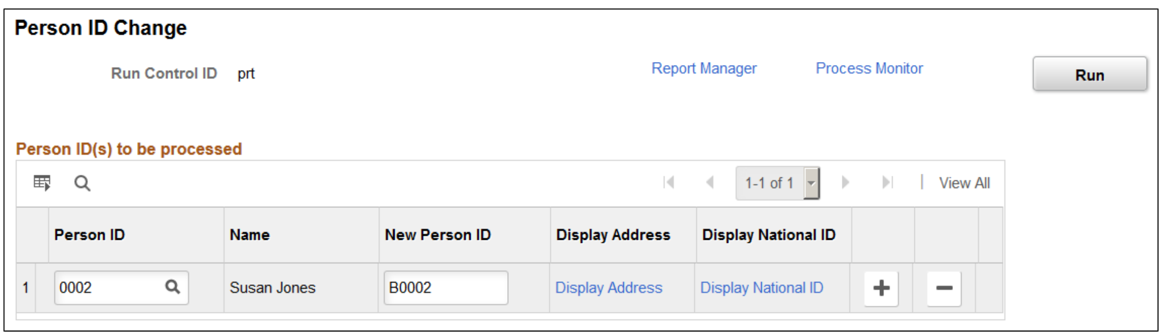
Person ID Change Page

Use the Person ID Change page (RUNCTL_ID_CHANGE) to modify person IDs.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **Person ID Change** > **Person ID Change**

This example illustrates the fields and controls on the Person ID Change page.



Select the current ID of the person that you want to process and enter the new ID. When you enter an ID, the page displays the **Display Address** and **Display National ID** links. Click the links to see display-only information on the person to whom the system or you assigned the original ID. Confirm that this is the correct person before you process the ID change.

Although the Person ID Change process updates the ID in every record where PeopleSoft Human Resources uses it, administrators can use the “Person ID Inclusion Page” (Application Fundamentals) to add other records and fields (that store the employee ID) to be included in the process. Note that changes made to the inclusion page will also impact the delete process.

After running the Change Person ID process, you can review the updated records for the specific individual on the Person ID Change/Delete Log Page.

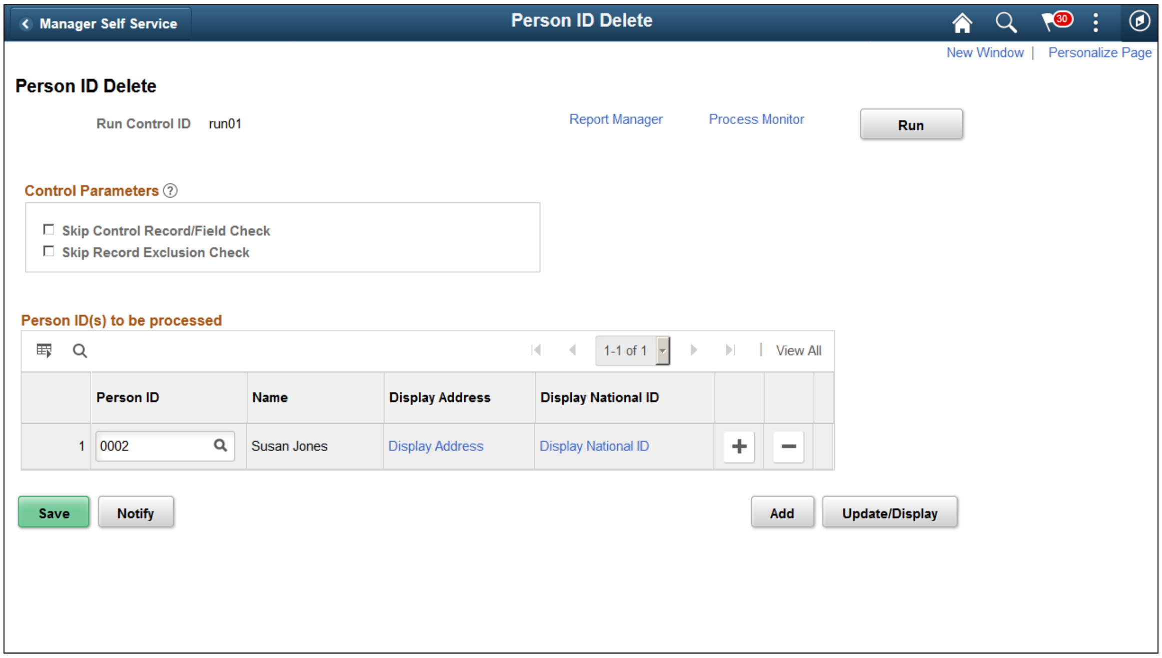
Person ID Delete Page

Use the Person ID Delete page (RUNCTL_ID_CHANGÈ) to identify person IDs to be removed from the system and run the process.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **Person ID Delete** > **Person ID Delete**

This example illustrates the fields and controls on the Person ID Delete page.



Field or Control	***Description***
Run	Click the **Run** button to access the Process Scheduler Request page, where you can run or schedule the Person ID Delete process. This deletion process is irreversible.

Control Parameters

Note: Oracle delivers the *ID Delete User* role. Only users with this role can modify the settings in this group box. For users without this role, these check boxes are disabled.

Field or Control	*Description*
Skip Control Record/Field Check	Select this check box to override and skip the validation of the **Control Records/Fields** values on the “Person ID Delete Control Page” (Application Fundamentals) during the Person ID Delete process. For example, if this option is deselected and a person has a record that corresponds with one defined in the **Control Record/Fields** grid box, then the system will not process the delete for this person. If you select this check box, the person data will be deleted, even if there is existing data for this person in the records listed in the **Control Record/ Fields** grid box. This check box is deselected by default. With this default setting, the deletion process does not allow deletion of Person ID from the system if data exists in the ID Delete Control setup.
Skip Record Exclusion Check	Select this check box to override the **Exclude Records** listed on the “Person ID Delete Control Page” (Application Fundamentals) during the Person ID Delete process. For example, if this option is deselected and a person has data rows in any of the records listed in the **Exclude Records** grid box, then the system will process the delete of the person but will retain the employee data in the exclusion records listed on the Person ID Delete Control page. If you select this check box, person data will be deleted from all records, including those from the ones listed in the **Exclude Records** group box on the Person ID Delete Control setup. This check box is deselected by default. With this default setting, the deletion process does not affect tables that the process is configured to exclude.

Note: If the **Skip Control Record/Field Check** and **Skip Record Exclusion Check** are both deselected, the process will first check the **Control Record/Field** configuration. If there are data rows for the person in any of the records listed in the **Control Record/Fields** on the “Person ID Delete Control Page” (Application Fundamentals) setup, then the Person ID Delete process is not initiated. The component stops any further processing.

Person ID(s) to be processed

Enter the person IDs to be deleted during the Person ID Delete process. When the process runs, the system will check this person against the “Person ID Delete Control Page” (Application Fundamentals) settings if you have not selected to skip the checks from the Control Parameters group box at the top of this page. If the person has records that match those listed on that control page, and you have not indicated to skip the check on this page, then the system will not allow the process to delete the person ID and will retain the specified exclusion records.

Field or Control	***Description***
<sequence number>	If you enter multiple person IDs in the grid, the Person ID Delete process runs through each person in sequence.
Person ID and **Name**	Enter the ID that you want to delete. The system displays the name of the person with that ID. It also enables the **Display Address** and **Display National ID** links where you can verify that you've entered the correct person ID.
Display Address	Click this link to access the page on which you can review address data to further determine if this is the correct ID to delete.
Display National ID	Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to delete.

Although the Person ID Delete process removes the person ID in every record where PeopleSoft Human Resources uses it, with the except those identified on the Person ID Delete Control page, the administrator can use the "Person ID Inclusion Page" (Application Fundamentals) to add other records and fields (that store the employee ID) to be included in the process. Note that changes made to the inclusion page will also impact the change process.

After running the Delete Person ID process, you can review the updated records for the specific individual on the Person ID Change/Delete Log Page.

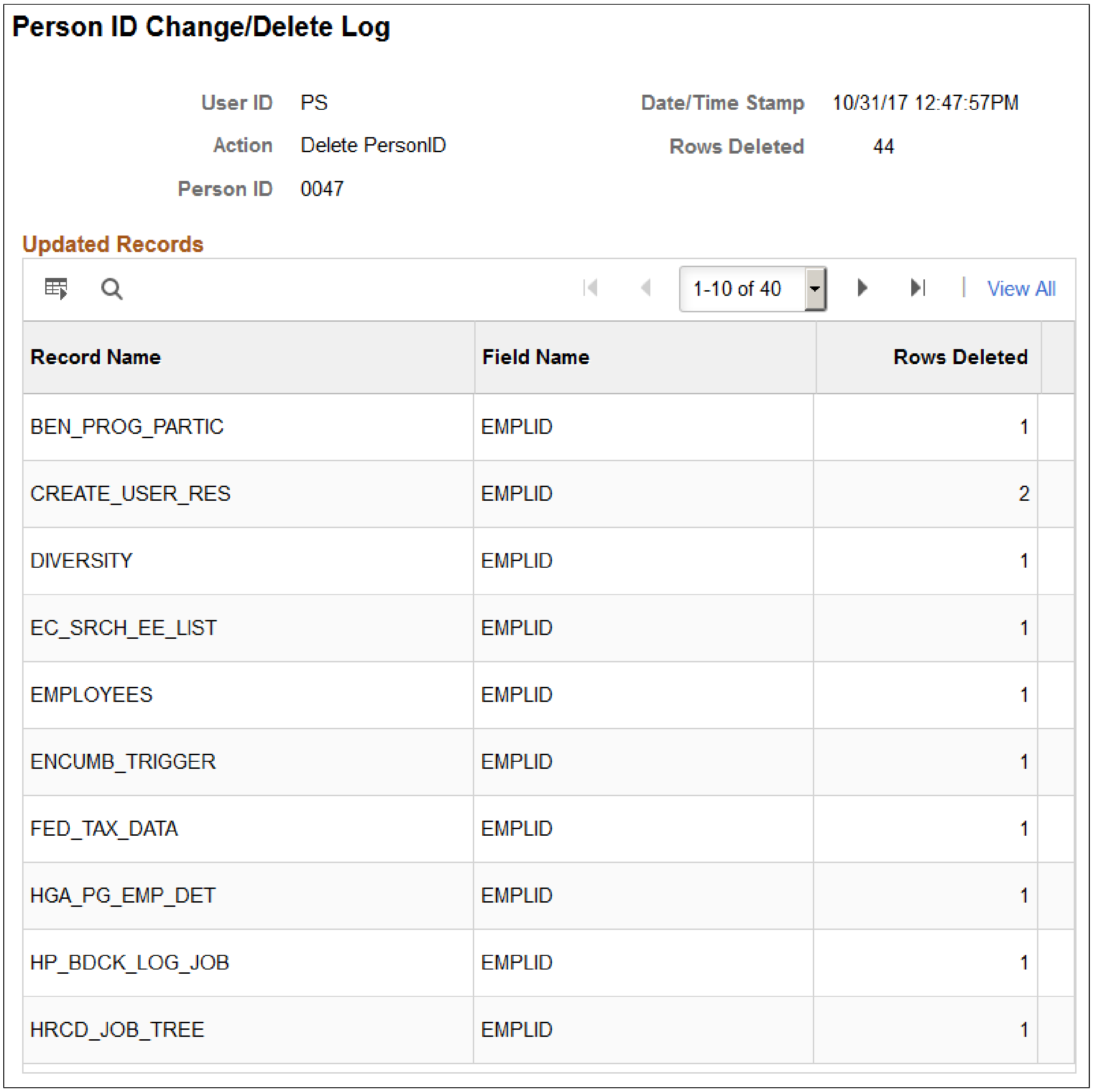
Person ID Change/Delete Log Page

Use the Person ID Change/Delete Log page (HR_PER502_LOG) to view a log that lists which rows of data were affected when you changed or deleted an ID.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **Person ID Change/Delete Log** > **Person ID Change/Delete Log**

This example illustrates the fields and controls on the Person ID Change/Delete Log page.



This page lists the records and fields that the system modified when you changed or deleted the selected ID.

Field or Control	***Description***
User ID	Identifies the user who ran the specified instance of the Person ID Change or Delete process.
Action	Displays whether this information reflects a *Delete PersonID* or *Change PersonID* action.

Field or Control	*Description*
Person ID	Displays the original ID for a single person who was deleted. A single instance of the process can delete multiple person IDs, but this page displays information for only one applicant at a time.
New Person ID	The page displays this field for *Change PersonID* actions and indicates the new person ID assigned in the system.
Date/Time Stamp	Indicates when the Person ID Change or Delete process ran. This is the date and time for the process instance, so it is the same for all persons who were processed together.
Row Deleted or **Rows Changed**	Displays the total number of rows (across all records) that were deleted or changed for the specified person.

Updated Records

Field or Control	*Description*
Record Name	Identifies a record where rows were deleted or changed.
Field Name	Identifies the Person ID field in the record. Typically the value is *EMPLID*.
Rows Deleted or **Rows Changed**	Displays the number of rows that were deleted or changed from the specified record.

Deleting Employment Record Numbers (ERNs)

These topics provide an overview of deleting ERNs and discuss how to delete employment record numbers.

Pages Used to Delete ERNs

Page Name	*Definition Name*	*Usage*
ERN Delete Field Names Page	HR_EERCDDEL_FIELDS	Define Person ID field names and Empl Rcd Nbr field names maintained in the system.

Page Name	***Definition Name***	***Usage***
Tables with Person ID and ERN Page	HR_EERCDDEL_FLDSEC	Displays all tables in the system that have any combination of these defined PersonID and ERN fields.
ERN Delete Control Page	HR_EERCDDEL_CTL	Define which Message Catalog message text to display for each Control Table/Field conflict. Define deletion restrictions to avoid deletion of ERNs with dependencies in the system.
ERN Delete Exception Tables Page	HR_EERCDDEL_EXC	Define exceptions for the deletion logic.
ERN Delete Process Page	HR_RUNCTL_EERCDDEL	Remove a Person ID or Empl_Rcd from the database.
ERN Delete Process Results Page	HR_EERCDDEL_RESULT	Lists ERN Delete Process results information.

Understanding the Delete ERN Components

Use the ERN Delete-related components when ERNs are created in error or when ERNs exist for "no show" new hires (for example, workers who never reported for their first day of work and for whom there is no need to maintain an ERN). The ERN Delete Control Page verifies that no combinations of PersonID/ERN exist that will cause problems for other processes, such as payroll or benefits, that are dependent on the ERN data.

Before using these components, consider these points:

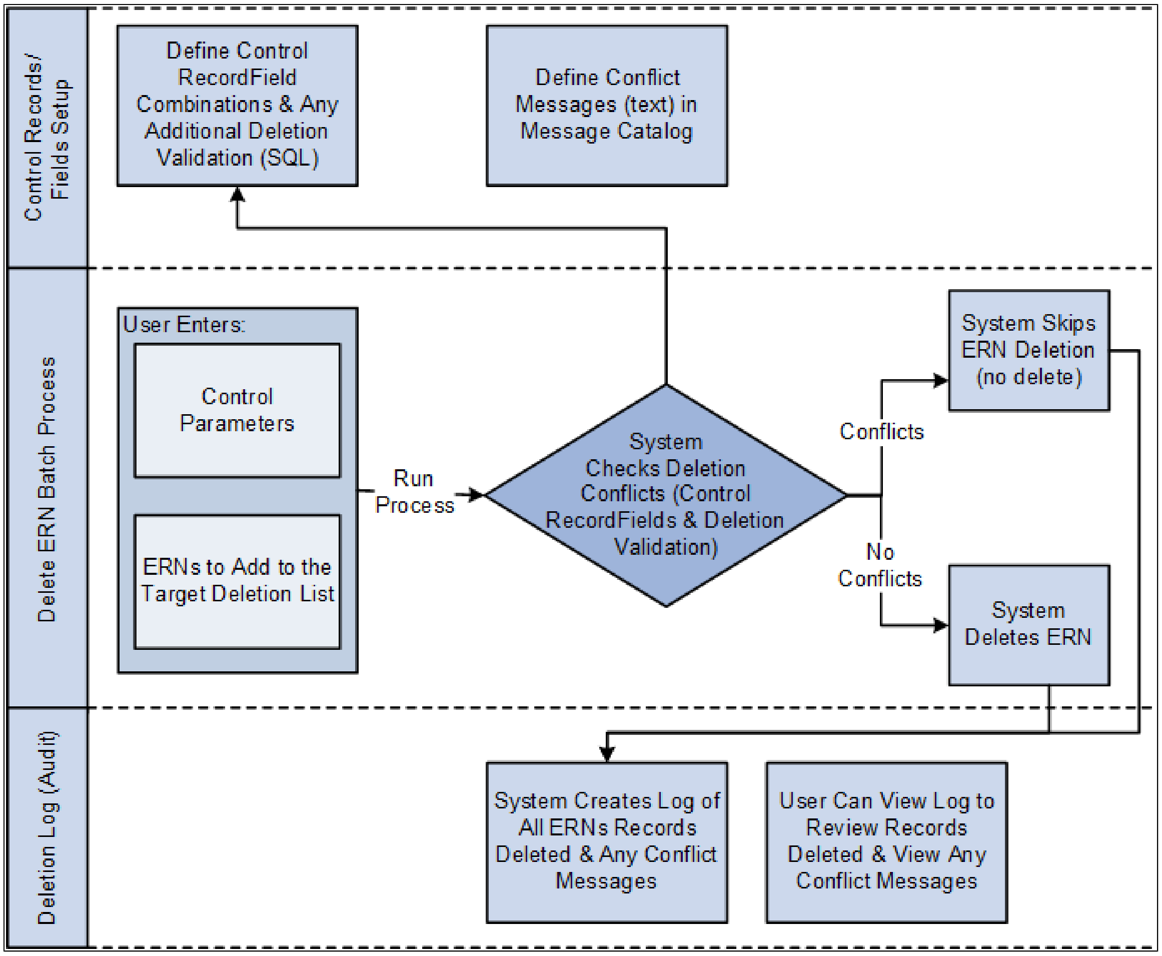
- This feature is designed to be used by HR System Administrators who have a good understanding of implications and processes related to deleting data across systems. Functional business users should not have access to this feature.
- This feature is not designed to delete ERN records for PersonID/Empl_Rcd combinations that have been used in key processes such as payroll, benefits, and time reporting. If the ERN has been used in key processes, the system will block deletion.

  Note: If an ERN (Empl Rcd Number) is added by mistake for a multiple job employee whose payroll is managed in Payroll for North America, and that employee has one or more other jobs (ERNs) with the same company, then the ERN cannot be deleted.

- The PeopleSoft HCM application delivers system data conflict checks, but enables you to add additional logic and conflict checks to meet your organization's requirements for ERN deletion.
- Administrators with the *ID Delete User* role can select options on the ERN Delete Process page to bypass the delete controls on the ERN Delete Control page and ERN Delete Exception Tables page.

Note: Use this feature to avoid "false" same-day terminations that may cause errors in unemployment insurance eligibility and termination reports.

This flowchart illustrates the Delete ERN process. Setup tasks include defining deletion criteria, validations, and error messages. Then, during the deletion batch process, the administrator chooses ERNs to be deleted, and the system checks the ERNs against the deletion criteria, deleting only those with no conflicts. Finally, during the audit phase of the process, the system creates a log showing the deleted ERNs and the conflict messages for the ERNs that were not deleted:



Deleting ERNs in a Multi-Product Environment

The steps to delete ERNs affect HCM data only. No controls are delivered that check across products in a multi-product environment. Be aware of the impact of the delete process on other products and set up additional controls to avoid integrity issues.

For example, if an employee record number is created in HCM and then used in a product order, you can remove the ERN in HCM, but it still exists in the order database.

Note: PeopleSoft provides a Message Subscription (service operation PERSON_ERN_DELETE) that is used to synchronize two HCM databases. It can be configured to synchronize other products.

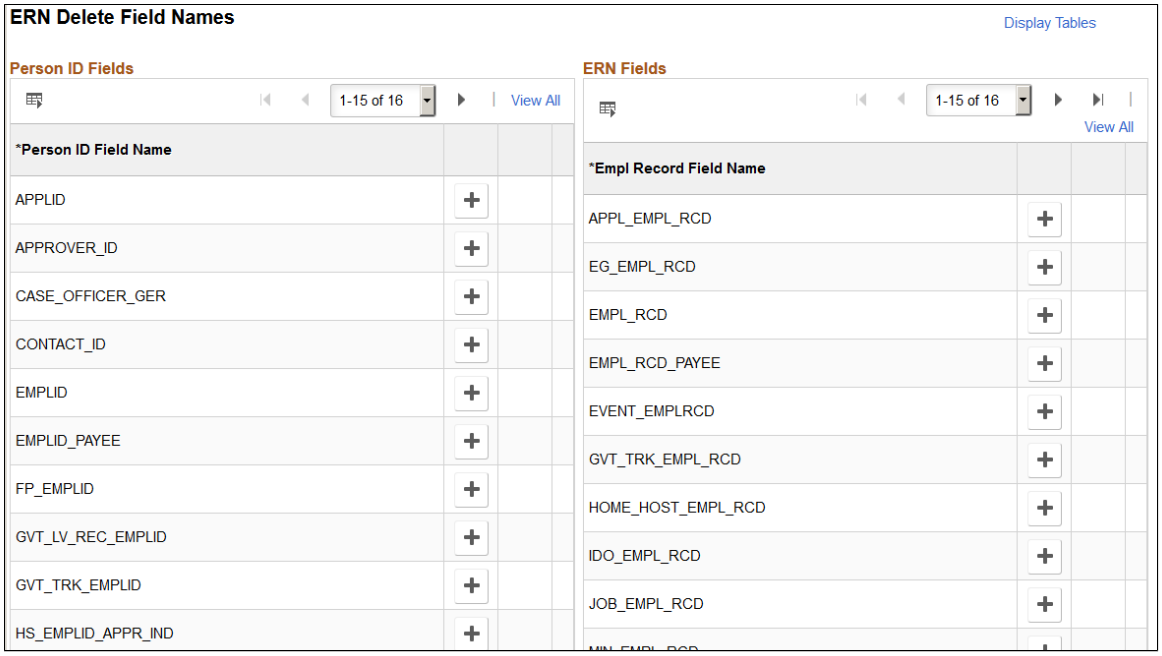
ERN Delete Field Names Page

Use the ERN Delete Field Names page (HR_EERCDDEL_FIELDS) to define Person ID field names and Empl Rcd Nbr field names maintained in the system.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **ERN Delete Process** > **Employee Record Delete Fields** > **ERN Delete Field Names**

This example illustrates the fields and controls on the ERN Delete Field Names page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Person ID Field Name	Use this table to specify the field names for the Person ID available in the system.
ERN Fields	Use this table to specify the field names for the Empl Rcd available in the system.
Display Tables	Click this link to display all tables in the system that have any combination of these defined PersonID and ERN fields. This display enables system administrators to review tables potentially impacted by the ERN Delete process.

ERN Delete Control Page

Use the ERN Delete Control page (HR_EERCDDEL_CTL) to define which Message Catalog message text to display for each Control Table/Field conflict.

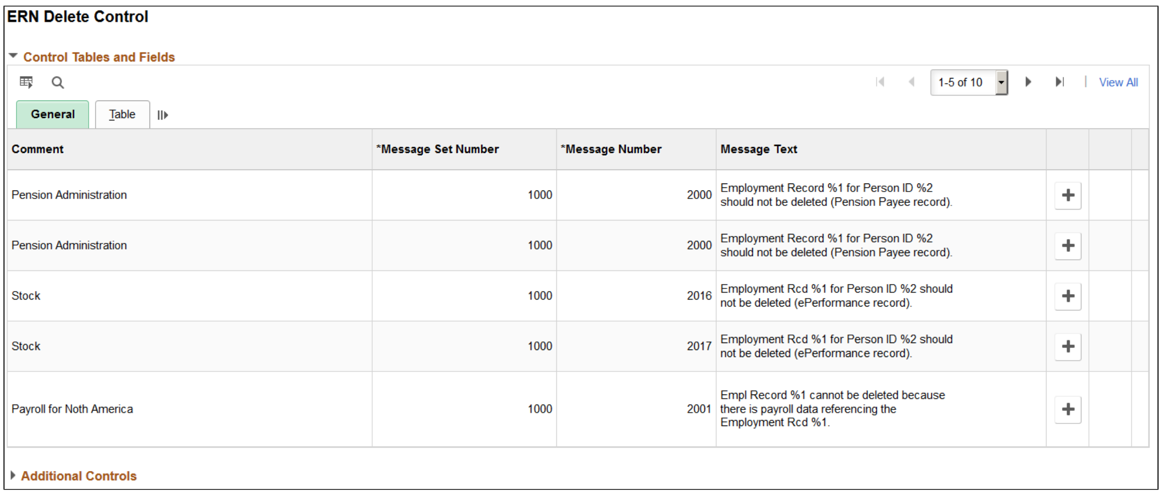
Define deletion restrictions to avoid deletion of ERNs with dependencies in the system.

Note: The PeopleSoft HCM application delivers the *ID Delete User* role that you can assign to administrators. This role enables administrators to select the **Skip Control Record/Field Check** control parameter on the ERN Delete Process Page, which tells the ERN Delete process to skip the validation of fields and controls set on this page. For administrators without this role, this option is disabled and they cannot skip the validation of these fields and controls.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **ERN Delete Process** > **Employee Record Delete Control** > **Employee Record Delete Control**

This example illustrates the fields and controls on the ERN Delete Control page: General tab. You can find definitions for the fields and controls later on this page.



ERN Delete Control

Control Tables and Fields

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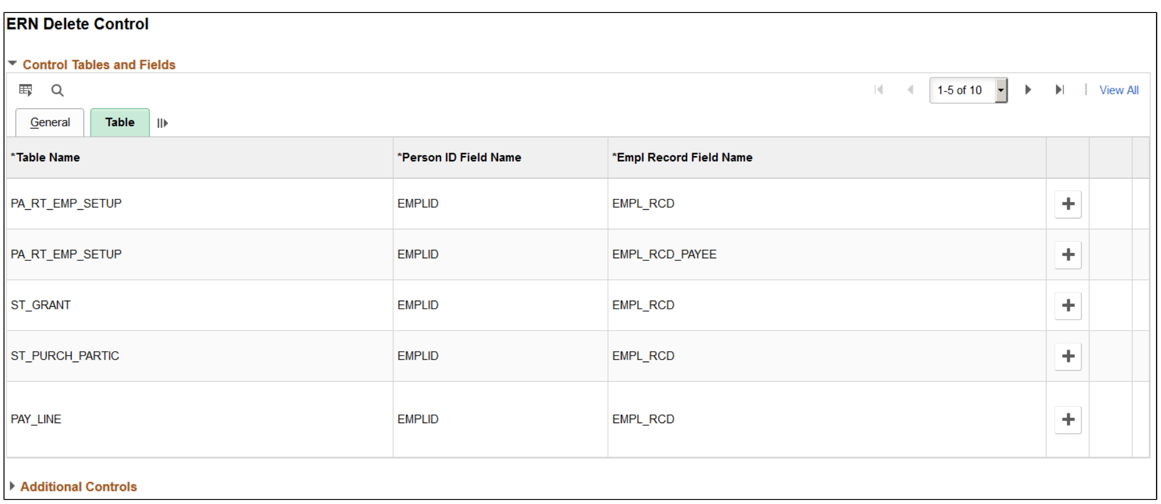
General Table

Comment	*Message Set Number	*Message Number	Message Text
Pension Administration	1000	2000	Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record).
Pension Administration	1000	2000	Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record).
Stock	1000	2016	Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record).
Stock	1000	2017	Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record).
Payroll for Noth America	1000	2001	Empl Record %1 cannot be deleted because there is payroll data referencing the Employment Rcd %1.

Additional Controls

Each of the conflict checks has a configurable conflict message. You can assign conflict messages using the Message Catalog. Conflict messages are displayed on the ERN Delete Process Results page.

This example illustrates the fields and controls on the ERN Delete Control page: Table tab . You can find definitions for the fields and controls later on this page.



ERN Delete Control

Control Tables and Fields

1-5 of 10 View All

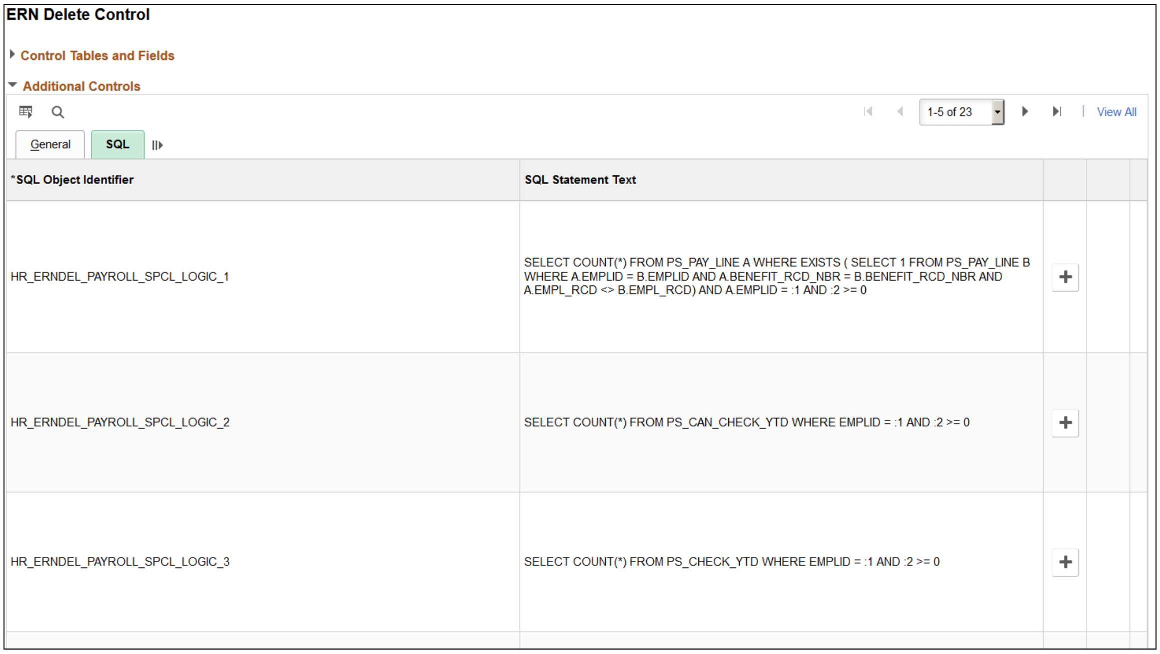
General Table

*Table Name	*Person ID Field Name	*Empl Record Field Name
PA_RT_EMP_SETUP	EMPLID	EMPL_RCD
PA_RT_EMP_SETUP	EMPLID	EMPL_RCD_PAYEE
ST_GRANT	EMPLID	EMPL_RCD
ST_PURCH_PARTIC	EMPLID	EMPL_RCD
PAY_LINE	EMPLID	EMPL_RCD

Additional Controls

The system checks these table and field combinations prior to running the Delete ERN process to help ensure that no key dependent data or process will be negatively impacted by the delete. The system scans the record/field combinations defined in this table and if an ERN that is targeted for deletion is identified in one of these control table/field combinations, the system prevents the ERN from being deleted.

This example illustrates the fields and controls on the ERN Delete Control page: Additional Controls - SQL tab. You can find definitions for the fields and controls later on this page.



Use the SQL tab in the Additional Controls section of the page to enter more complex product specific conflict checking that cannot be represented through the simple entry of control records and fields. Add additional SQL logic that the system needs to check prior to deleting ERNs.

Note: You cannot delete ERN delete controls that are delivered as system data.

ERN Delete Exception Tables Page

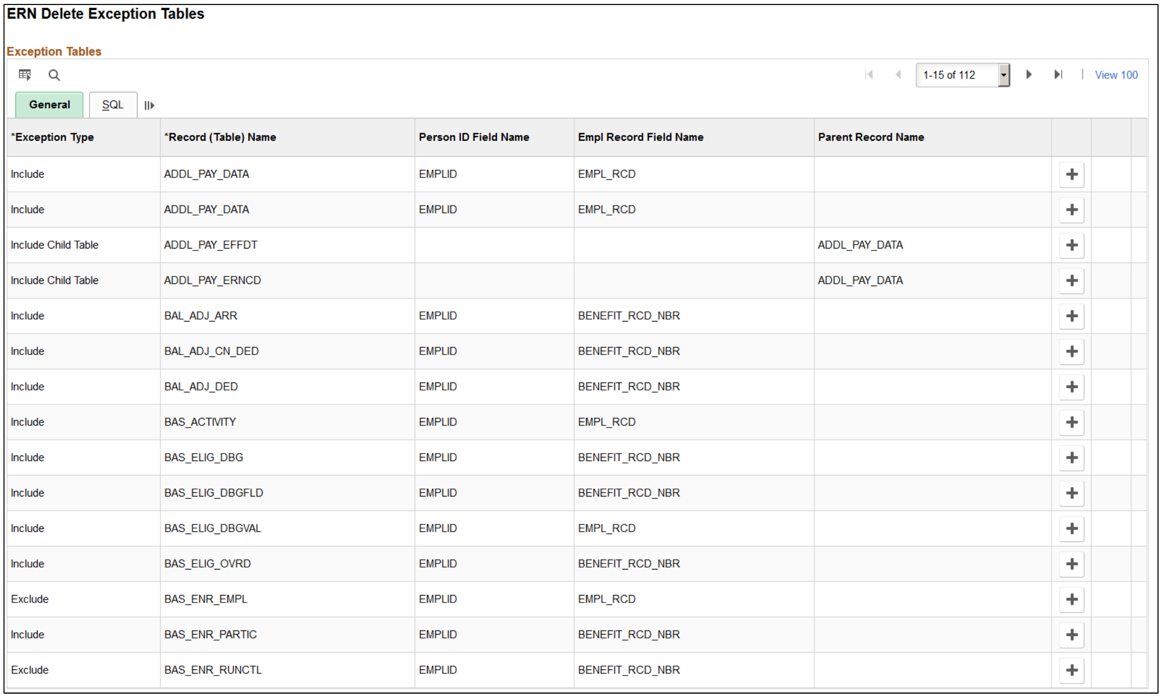
Use the ERN Delete Exception Tables page (HR_EERCDDEL_EXC) to define exceptions for the deletion logic.

Note: The PeopleSoft HCM application delivers the *ID Delete User* role that you can assign to administrators. This role enables administrators to select the **Skip Record Exclusion Check** control parameter on the ERN Delete Process Page, which tells the ERN Delete process to ignore the exception records identified by *Exclude* on this page as well as any of the %AET,AUDIT% and UPG% records in the system. For administrators without this role, this option is disabled and the system will not ignore the excluded records.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **ERN Delete Process** > **Employee Record Exceptions** > **ERN Delete Exception Tables**

This example illustrates the fields and controls on the ERN Delete Exception Tables page: General tab. You can find definitions for the fields and controls later on this page.


ERN Delete Exception Tables

Exception Tables

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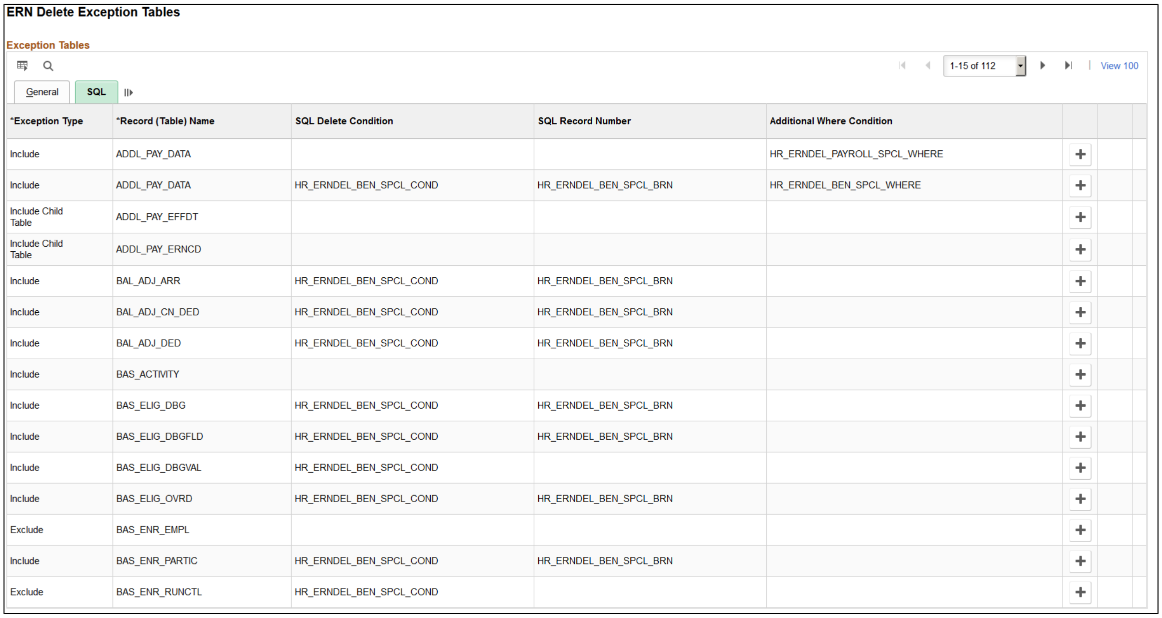
General SQL

*Exception Type	*Record (Table) Name	Person ID Field Name	Empl Record Field Name	Parent Record Name
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD	
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD	
Include Child Table	ADDL_PAY_EFFDT			ADDL_PAY_DATA
Include Child Table	ADDL_PAY_ERNCD			ADDL_PAY_DATA
Include	BAL_ADJ_ARR	EMPLID	BENEFIT_RCD_NBR	
Include	BAL_ADJ_CN_DED	EMPLID	BENEFIT_RCD_NBR	
Include	BAL_ADJ_DED	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ACTIVITY	EMPLID	EMPL_RCD	
Include	BAS_ELIG_DBG	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ELIG_DBGFLD	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ELIG_DBGVAL	EMPLID	EMPL_RCD	
Include	BAS_ELIG_OVRD	EMPLID	BENEFIT_RCD_NBR	
Exclude	BAS_ENR_EMPL	EMPLID	EMPL_RCD	
Include	BAS_ENR_PARTIC	EMPLID	BENEFIT_RCD_NBR	
Exclude	BAS_ENR_RUNCTL	EMPLID	BENEFIT_RCD_NBR	

Field or Control	***Description***
Exception Type	Select one of three options in this field: • *Include* includes the table in the deletion process. Select this option when the table does not follow the standard rule, but specific requirements. • *Exclude* excludes the table from the deletion process. • *Include Child Table* includes a table that does not contains an ERN but is attached as a child to a table that must be deleted.
Record (Table) Name	The name of the table to be included or excluded.
Person ID Field Name	The name of the EmplID field to be used for deletion.
Empl Record Field Name	The name of the EMPL_RCD field to be used for deletion.
Parent Record Name	The parent table of child table to be included in the deletion.

Access the SQL tab on the ERN Delete Exception Tables page.

This example illustrates the fields and controls on the ERN Delete Exception Tables page: SQL tab. You can find definitions for the fields and controls later on this page.


ERN Delete Exception Tables

Exception Tables

General | SQL

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*Exception Type	*Record (Table) Name	SQL Delete Condition	SQL Record Number	Additional Where Condition
Include	ADDL_PAY_DATA			HR_ERNDEL_PAYROLL_SPCL_WHERE
Include	ADDL_PAY_DATA	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	HR_ERNDEL_BEN_SPCL_WHERE
Include Child Table	ADDL_PAY_EFFDT			
Include Child Table	ADDL_PAY_ERNCD			
Include	BAL_ADJ_ARR	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAL_ADJ_CN_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAL_ADJ_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ACTIVITY			
Include	BAS_ELIG_DBG	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ELIG_DBGFLD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ELIG_DBGVAL	HR_ERNDEL_BEN_SPCL_COND		
Include	BAS_ELIG_OVRD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Exclude	BAS_ENR_EMPL			
Include	BAS_ENR_PARTIC	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Exclude	BAS_ENR_RUNCTL	HR_ERNDEL_BEN_SPCL_COND		

Field or Control	***Description***
SQL Delete Condition	Define a condition for deletion based on EMPLID and EMPL _RCD. If the request defined in the setup returns a number greater than 0, the record will be skipped during the deletion process.
SQL Record Number	Define a request that returns the number to be used as the ERN based on EMPLID and EMPL_RCD.
Additional Where Condition	Request that defines an additional where clause added during the deletion process.

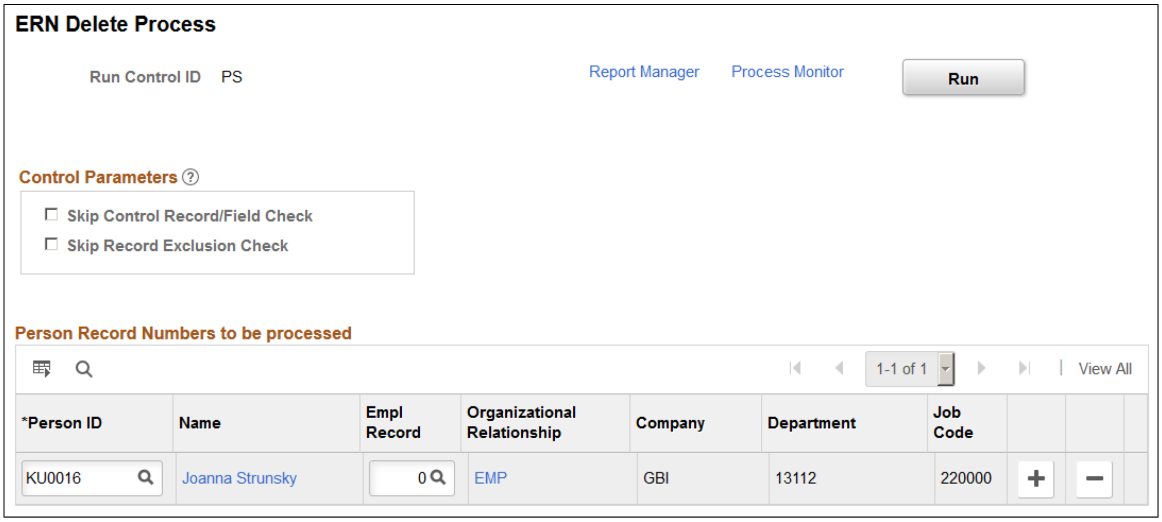
ERN Delete Process Page

Use the ERN Delete Process page (HR_RUNCTL_EERCDDEL) to remove a Person ID or Empl_Rcd from the database.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **ERN Delete Process** > **Employee Record Delete** > **ERN Delete Process**

This example illustrates the fields and controls on the ERN Delete Process page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Run	Click the **Run** button to access the Process Scheduler Request page, where you can run or schedule the Person ID Delete process. This deletion process is irreversible.

Control Parameters

Note: The PeopleSoft HCM application delivers the *ID Delete User* role. Only administrator users with this role can modify the settings in this group box. For users without this role, these check boxes are disabled.

Field or Control	*Description*
Skip Control Record/Field Check	Select this check box to have the ERN Delete process skip the validation of fields and controls within the ERN Delete Control Page, Control Tables and Fields grid box. For example, if this option is left deselected and there is a record that corresponds to those defined on the ERN Delete Control Page, then the system will issue the warning and not process the ERN delete. If you select this check box, the ERN will be deleted even if there is existing data for this person in the records listed in the **Control Tables and Fields** grid box. This check box is deselected by default. With this default setting, the deletion process does not allow deletion of the ERN from the system if data exists in the ERN Delete Control setup.

Field or Control	Description
Skip Record Exclusion Check	Select this check box to have the ERN Delete process ignore the exception records marked as *Exclude* on the ERN Delete Exception Tables Page as well as any of the %AET,AUDIT% and UPG% records in the system. For example, if this option is left deselected and a person has data rows that correspond to any of the exception records listed as *Exclude*, then the system will process the ERN delete. If you select this check box, the process with delete the ERN even though it is listed as *Exclude* in the exception setup. This check box is deselected by default. With this default setting, the deletion process does not affect tables that the process is configured to exclude.

Note: When the **Skip Control Record/Field Check**is deselect, regardless if the **Skip Record Exclusion Check** is selected or deselect, the process will first check the ERN Delete Control page configuration. If the person has data rows in any of the records listed on the ERN Delete Control setup page, then the ERN Delete process will not continue with the deletion.

This video demonstrates the ERN Delete Process enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 27: Data privacy Enhancements - Employment Record Delete

Person Record Numbers to be processed

Field or Control	Description
Person ID	Use this lookup to select the person for whom you want to delete an ERN.
Name	Displays the name of person selected. Click the link to display biographical data that enables you to confirm that this is the correct person.
Empl Record	Use this lookup to select the employment record number to delete. You can delete any employment record, including future-dated records.
Organizational Relationship	Click the links to view the Personal Organizational Summary page. This page enables you to confirm that you have selected the appropriate ERN.
Company	The company that is related to the ERN.

Field or Control	*Description*
Department	The department that is related to the ERN.
Job Code	The job code that is related to the ERN.

Note: If an ERN (Empl Rcd Number) is added by mistake for a multiple job employee whose payroll is managed in Payroll for North America, and that employee has one or more other jobs (ERNs) with the same company, then the ERN cannot be deleted.

ERN Delete Process Results Page

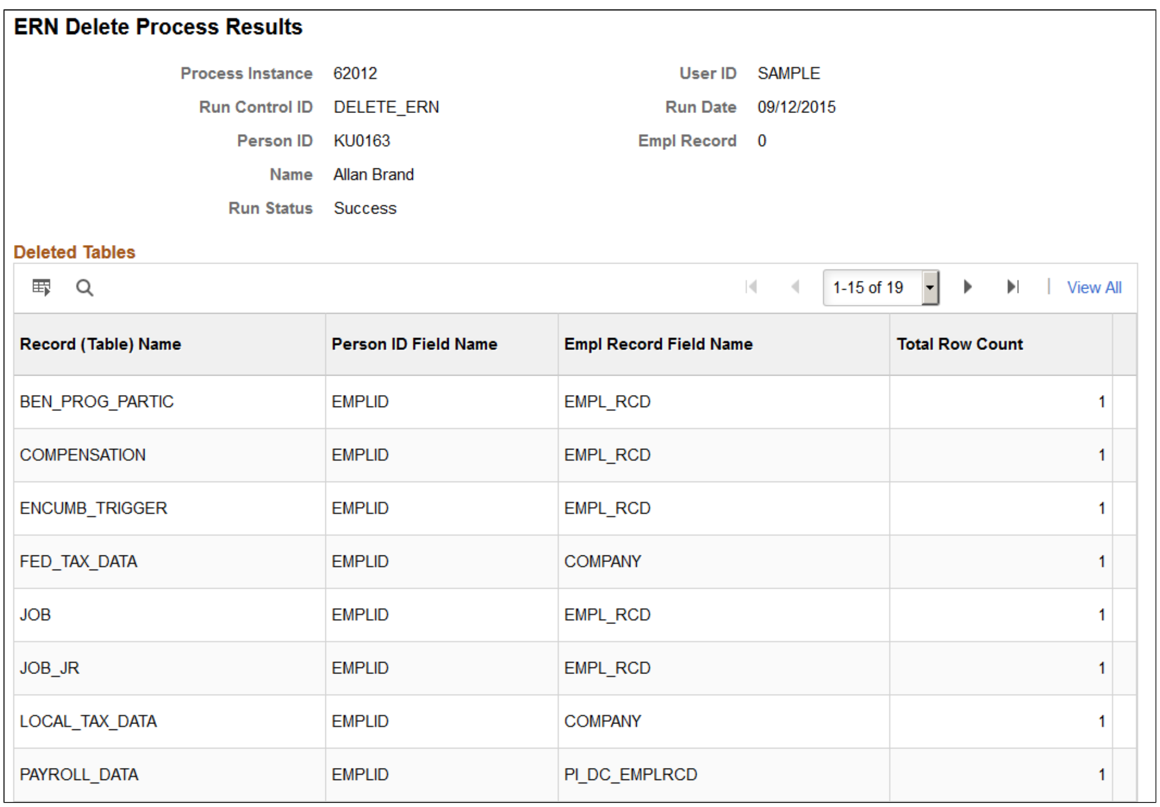
Use the ERN Delete Process Results page (HR_EERCDDEL_RESULT) to lists ERN Delete Process results information.

Navigation:

Set Up HCM > **System Administration** > **Database Processes** > **ERN Delete Process** > **Employee Record Delete Results** > **ERN Delete Process Results**

This page displays results for a single ERN. The page appearance changes depending whether the ERN was successfully deleted.

This example illustrates the fields and controls on the ERN Delete Process Results page - Run Status - Success. You can find definitions for the fields and controls later on this page.



ERN Delete Process Results

Process Instance 62012 User ID SAMPLE

Run Control ID DELETE_ERN Run Date 09/12/2015

Person ID KU0163 Empl Record 0

Name Allan Brand

Run Status Success

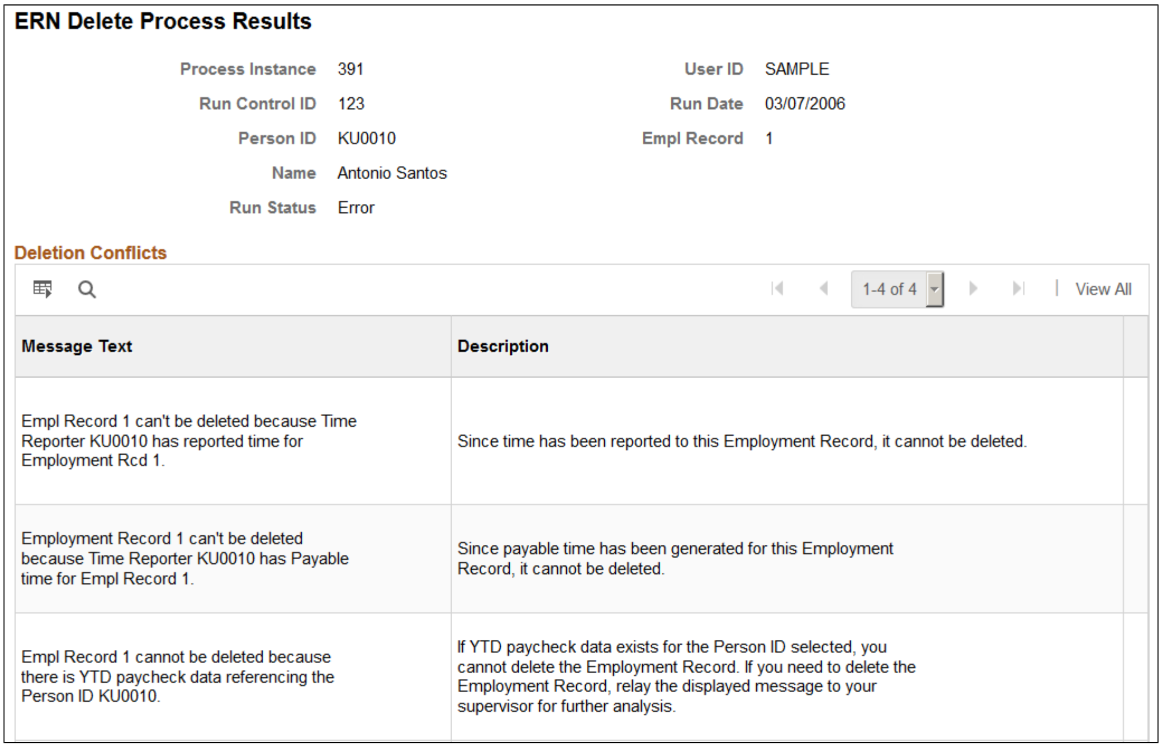
Deleted Tables

1-15 of 19 View All

Record (Table) Name	Person ID Field Name	Empl Record Field Name	Total Row Count
BEN_PROG_PARTIC	EMPLID	EMPL_RCD	1
COMPENSATION	EMPLID	EMPL_RCD	1
ENCUMB_TRIGGER	EMPLID	EMPL_RCD	1
FED_TAX_DATA	EMPLID	COMPANY	1
JOB	EMPLID	EMPL_RCD	1
JOB_JR	EMPLID	EMPL_RCD	1
LOCAL_TAX_DATA	EMPLID	COMPANY	1
PAYROLL_DATA	EMPLID	PI_DC_EMPLRCD	1

When the deletion is successful, you can review a list of tables where data was deleted.

This example illustrates the fields and controls on the ERN Delete Process Results - Run Status - Error. You can find definitions for the fields and controls later on this page.



When the deletion is not successful, the page displays message text describing why the ERN deletion was not processed.

Running Personal Data Reports

This topic lists the pages used to run personal data reports.

Pages Used to Run Personal Data Reports

Page Name	***Definition Name***	***Usage***
Birthdays Report Page	RUNCTL_PER002	Run the Employee Birthdays report (PER002). This report lists employees and contingent workers, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.

Page Name	Definition Name	Usage
Employee Home Address Listing Page	PRCSRUNCNTL	Run the Employee Home Address Listing report (PER020), which contains a complete listing of all employees and contingent workers, including addresses and home phone numbers.
Mailing Labels Page	PRCSRUNCNTL	Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees and contingent workers in your PeopleSoft Human Resources database. Run the Refresh Employees Table process before running this report.
Employee Listing SGP Page	RUNCTL_EMP_LIST	Run the Employee Listing report (PER801SG). This report provides employee and contingent worker information based on the run control selections of department, employee name, or employee ID.

Updating Organizational Instance and Assignment Relationships

These topics provide an overview of organizational instance and assignment relationships and discuss how to update organizational instance and assignment relationships.

Pages Used to Modify Organizational Instance and Assignment Relationships

Page Name	Definition Name	Usage
Work Location Page	JOB_DATA1	Enter a new row on this page to modify instance and assignment relationships.
Promote an Assignment Page	RUNCTL_OC_PRO_ASG	Batch process to promote assignments for multiple employees.
Promote an Assignment - Details Page	HCR_OC_PRO_ASG_SEC	Review the errors and warnings returned by the component interface.
Move Assignment to another Inst Page	HCR_OC_CHG_ASGN	Move an additional assignment to another instance.

Page Name	Definition Name	Usage
Demote an Instance Page	HCR_OC_CHG_ASGN	Change a controlling instance to an additional assignment under another instance. You can demote an instance to an assignment only if the instance does not have any additional assignments.

Understanding Organizational Instance and Assignment Relationships

When you promote an assignment to an instance, so that it is no longer subordinate to another organizational instance, you make an additional assignment into its own instance. For example, you might want to terminate a controlling instance, but maintain the additional assignment. If the additional assignment is subordinate to the controlling instance, they share the same organizational instance number, the additional job is terminated automatically when you terminate the controlling instance. To promote an instance for a single employee online, add a new row on the Work Location page of the Job Data component. Use the Promote an Assignment page to promote assignments for multiple employees as a batch process.

Use the Demote Instance page to make a controlling instance into an additional assignment under another instance. To demote an instance, the controlling instance should not have any additional assignments.

Use the Move Assignment to another Inst page to move an additional assignment to another instance. This is useful to correct errors. For example, when you select the wrong employee record number to be the controlling instance.

These restrictions apply to modifying organizational instance and assignment relationships:

- These actions are valid only for employees and contingent workers; persons of interest are not eligible.
- These actions are not valid for Japan additional appointments and temporary assignments.
- You can only promote a host assignment to an instance if the host assignment is terminated and there are no future assignment rows with action ASG (Assignment) or ASC (Assignment Completion).
- Assignments with future rows with action ADL (Additional Job) are ineligible.
- You cannot change or delete a row after you confirm any of these actions.

The action codes that are entered on the rows for these actions are:

- OCA – Promote an Assignment to an Instance.
- OCI – Demote an Instance.
- OCM – Move an Assignment to another Instance.

Prerequisites

You must define action reasons that correspond to the delivered actions OCA, OCI, and OCM before using this component.

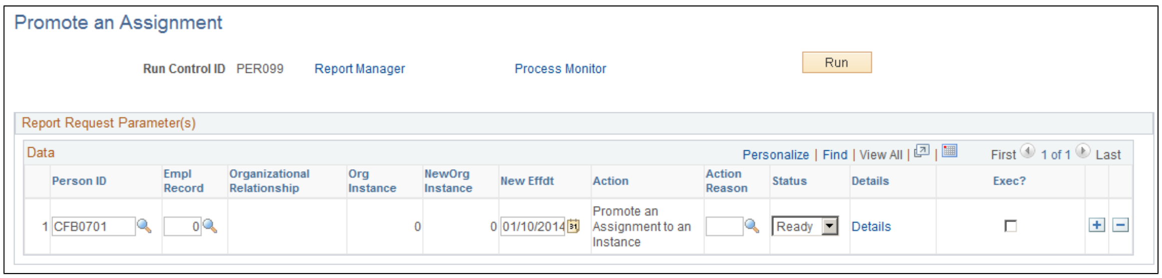
Promote an Assignment Page

Use the Promote an Assignment page (RUNCTL_OC_PRO_ASG) to batch process to promote assignments for multiple employees.

Navigation:

Workforce Administration > **Collective Processes** > **Promote an Assignment** > **Promote an Assignment**

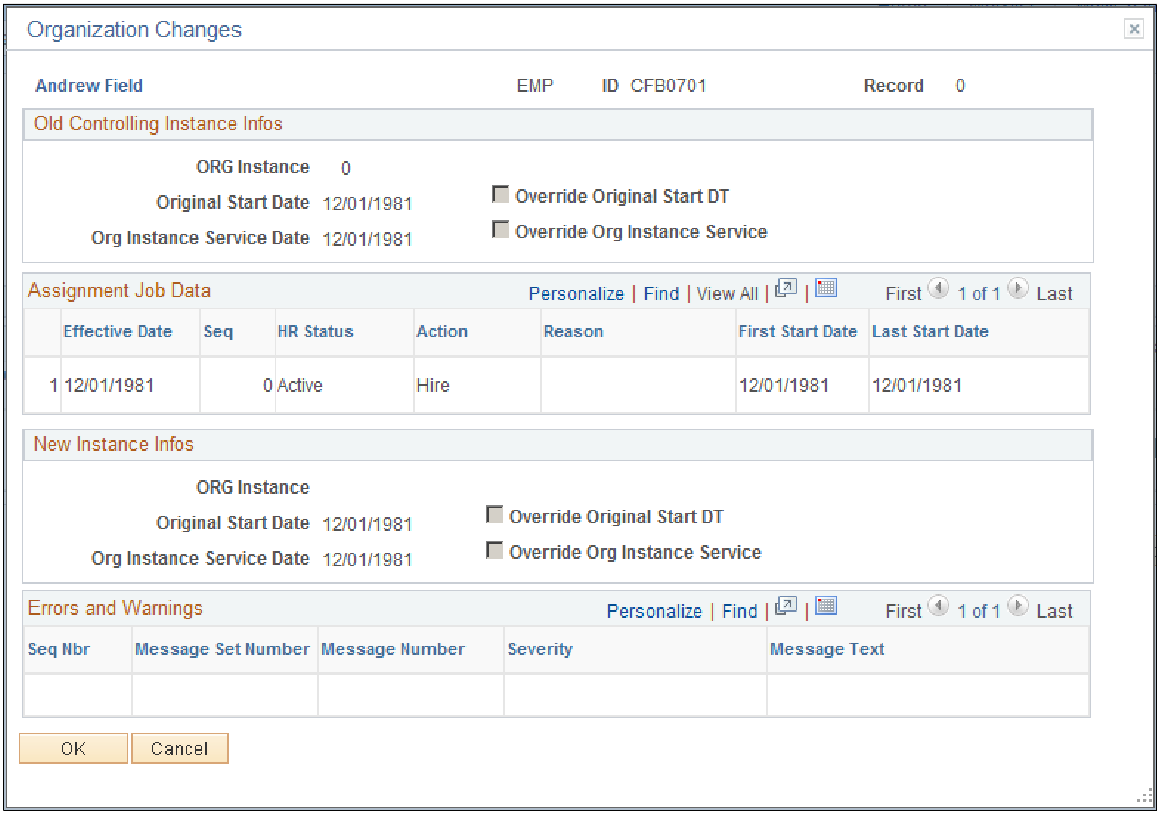
This example illustrates the fields and controls on the Promote an Assignment page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Org Relation	The organizational relationship. Valid values are *EMP* for employee and *CWR* for contingent worker.
Org Instance	The actual org instance.
New Effdt	The new effective date defaults to today's date.
Status	Available values are *Ready, Failure, Success,* and *Cancelled.* The default value is *Ready* for all rows. After the process has run to completion, you can review the status. If, for any reason, the transaction has not been loaded to the records, the status of the row is set to *Failure.* Otherwise the status is *Success.* You must determine the reasons why transactions ended in *Failure* and change the status back to *Ready* or to *Cancelled* before you run the process again.
Details	Click the link to open the Details page. Use this page to review the errors and warnings returned by the component interface.
Exec?	The process loads only the rows with **Status** set to *Ready* and with the **Exec?** check box selected.

Click the Details link to access the Details page for Promote Instance.

This example illustrates the fields and controls on the Promote an Assignment - Details page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Old Controlling Instance Infos	This information is for display only.
Assignment Job Data	The grid displays job data for the selected assignment, sorted by effective date in ascending order.

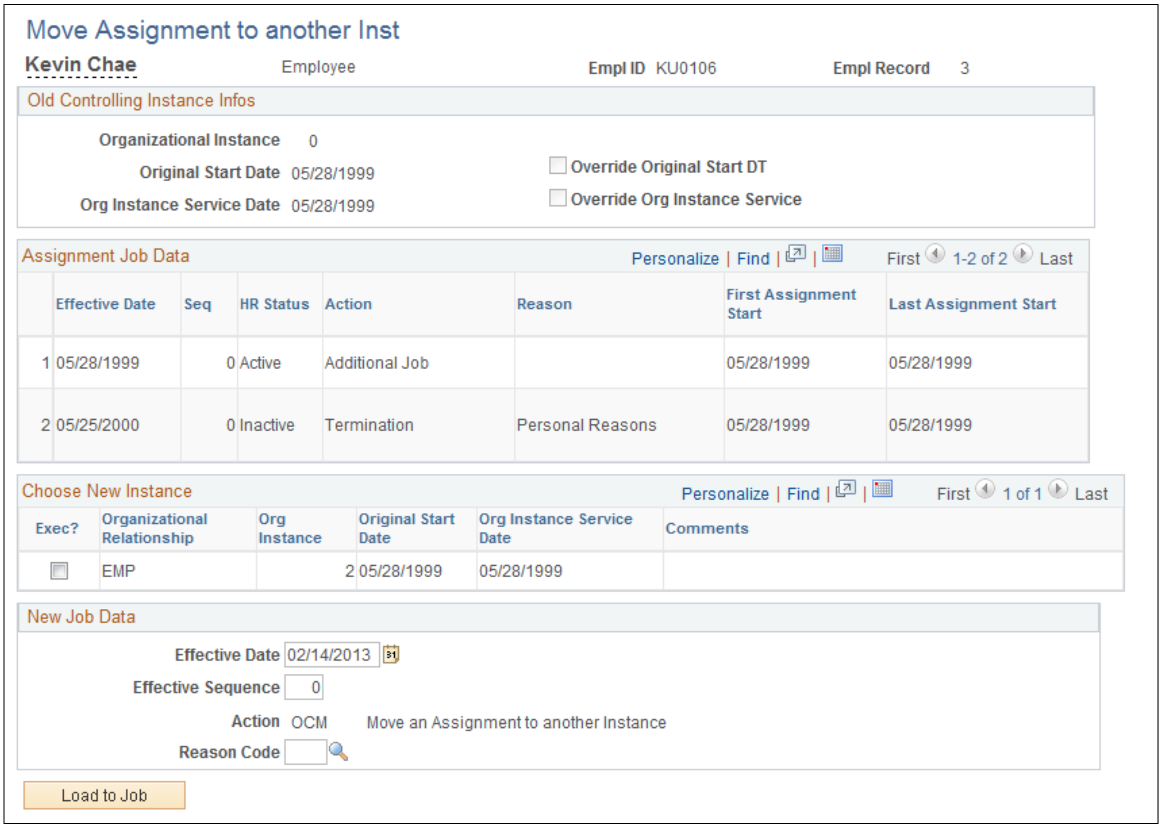
Move Assignment to another Inst Page

Use the Move Assignment to another Inst page (HCR_OC_CHG_ASGN) to move an additional assignment to another instance.

Navigation:

Workforce Administration > **Job Information** > **Assignment Instance Change** > **Move Assignment to another Inst**

This example illustrates the fields and controls on the Move Assignment to another Inst page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Assignment Job Data	The grid displays job data for the selected assignment, sorted by effective date in ascending order.
Choose New Instance	This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.
New Job Data	Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCM (move an assignment to another instance), and cannot be changed.
Load to Job	Click this button to insert the new job data into the JOB record.
Transfer to Job	This button is displayed after the Load to Job process runs successfully. Click the Transfer to Job button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Demote an Instance Page

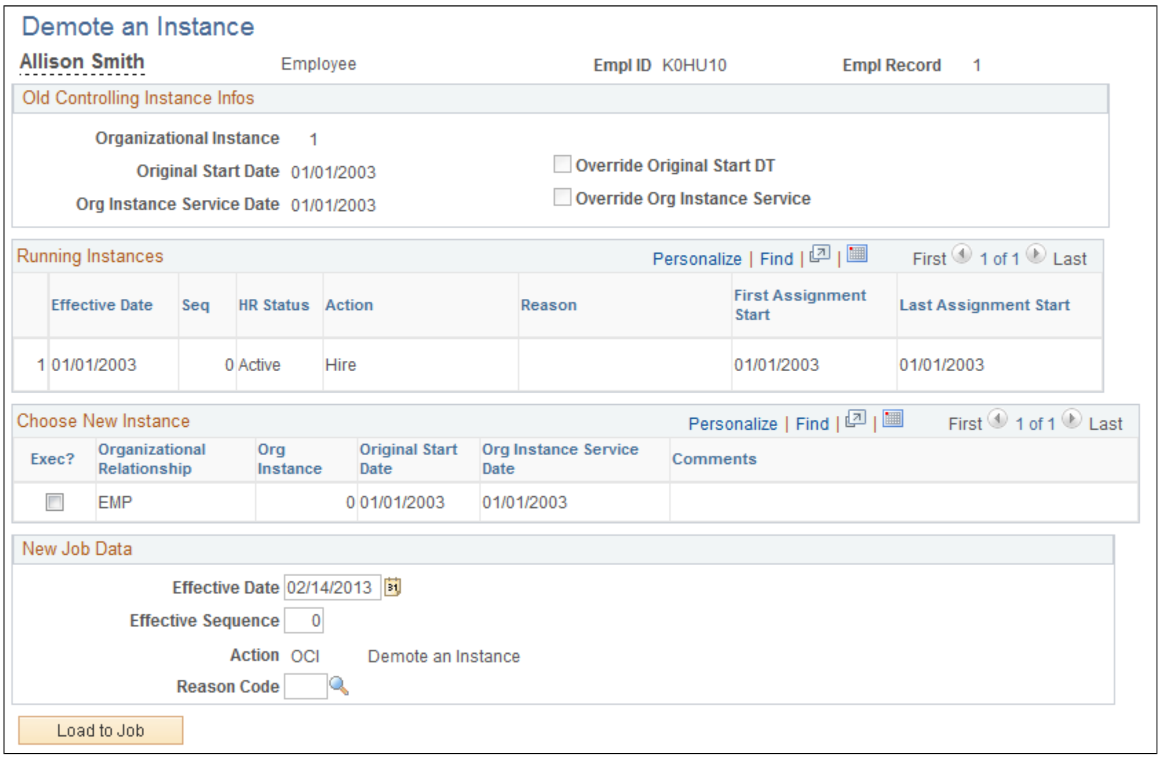
Use the Demote an Instance page (HCR_OC_CHG_ASGN) to change a controlling instance to an additional assignment under another instance.

You can demote an instance to an assignment only if the instance does not have any additional assignments.

Navigation:

Workforce Administration > Job Information > Demote an Instance > Demote an Instance

This example illustrates the fields and controls on the Demote an Instance page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Old Controlling Instance Infos	This information is for display only.
Running Instances	The grid displays job data for the selected assignment, sorted by effective date in ascending order.
Choose New Instance	This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

Field or Control	***Description***
New Job Data	Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCI (Demote and Instance), and cannot be changed.
Load to Job	Click this button to insert the new job data into the JOB record.
Transfer to Job	This button is displayed after the Load to Job process runs successfully. Click this button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Updating Salary Information

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

Note: The four pages in the Pay Rate Change component—Employee Profile, Salary Plan, Compensation, and Job Earnings Distribution—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page).

Pages Used to Update Salary Information

Page Name	***Definition Name***	***Usage***
Employee Profile Page	PAY_RT_CHANGE1	Adjust the work periods and hours if it is necessary to do so for the pay rate change.
Salary Plan Page	PAY_RT_CHG_SALPLAN	Adjust the salary step.
Pay Rate Change - Compensation Page	PAY_RT_CHANGE2	Adjust rates and frequencies.
Job Earnings Distribution Page	PAY_RT_CHANGE3	Adjust earnings distributions.

Related Links

Changing Job Data

Understanding Job Data

“Understanding Salary Plans” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

"Understanding Salary Grades and Steps" (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

Refreshing Compensation

When you run the Employee Compensation Application Engine process (HR_PER501A) or click the **Calculate Compensation** button on the Compensation Page, the same steps are executed, but you can update several records at once with the HR_PER501A process.

The Employee Compensation process:

- Inserts a new job row when you select **Add new effective date,** and uses the effective date that you entered in the **As Of Date** field.

  Alternatively, it updates the job row that is effective as of the date that you select in the **As Of Date** field.
- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select **Update Future Rows.**
- Replaces manual changes with the new default values.

Page Used to Refresh Compensation

Page Name	***Definition Name***	***Usage***
Calculate Compensation Page	RUNCTL_PER501	Use to run the Employee Compensation process to update compensation packages.

Running Job Data Reports

These topics provide an overview of reporting appointments for job data changes, list a common element, and discuss how to run the Japanese job data reports.

Pages Used to Run Job Data Reports

Page Name	***Definition Name***	***Usage***
Personnel Actions Report Page	RUNCTL_PER015	Run the Personnel Actions History report (PER015), which lists all workers affected by each of the job actions that you enter.

Page Name	***Definition Name***	***Usage***
Pending Future Actions Report Page	RUNCTL_ASOFDT_COMP	Run the Pending Future Actions report (PER021), which lists all workers with job action notices scheduled for a future date.
Department Action Notices Page	PRCSRUNCNTL	Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Run the Refresh Employees Table process before running this report.
Employees on Leaves of Absence Page	PRCSRUNCNTL	Run the Employees on Leave of Absence report (PER005). This report lists all workers on leave and their expected return dates. Use this report to compare the return date that you entered in PeopleSoft Human Resources with the worker's expected return date, or as a reminder to enter the return from leave information. Run the Refresh Employees Table process before running this report.
Temporary Employees Report Page	RUNCTL_ASOFDATE	Run the Temporary Employees report (PER007). This report provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.
Years of Service Report Page	RUNCTL_PER003	Run the Years of Service report (PER003). This report lists workers who have completed the number of years of service that you specify, as of the point in time that you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.
Primary Job Audit Page	RUNCTL_PER058	Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for workers with multiple jobs. Run this report regularly to correct discrepancies in worker job records.
Employee Turnover Analysis Page	RUNCTL_FROMTHRU	Run the Employee Turnover Analysis report (PER010). This report lists each department ID and provides the worker counts as of the date that you specify.

Page Name	Definition Name	Usage
(JPN) Appointment Notification JPN Page	RUNCTL_NTF_JPN	Run the JPN Appointment Notifications report (PER063JP). Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.
(JPN) Appointment List JPN Page	RUNCTL_NTF2_JPN	Run the Appointment List JPN report (PER064JP), which generates an appointment list. This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.
(JPN) Employee Assignment List JPN Page	RUNCTL_EMPLIST_JPN	Print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

Related Links

Understanding PARs

(JPN) Understanding Reporting Appointments for Job Data Changes

When workers are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each worker. These notifications, known as appointment notifications (Jirei), contain different information depending on the action and action reason entered on the worker's new job record.

Periodically, many companies also distribute a listing of all new hires or transfers or other changes of job. This list is known as the appointment list (Tsuutatsu).

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports contain, depending on the action for which you run the report:

Heading and Actions	Hire and Rehire	Transfer	Promotion	Termination
Announcement date	3	3	3	3

Heading and Actions	***Hire and Rehire***	***Transfer***	***Promotion***	***Termination***
Company description (of worker's company)	3	3		3
Department	3	3		3
Supervisor level	3	3		3
Employee status	3			
Salary plan			3	
Salary grade			3	

Note: For the actions *Transfer* and *Promotion,* the system automatically populates the **Reason** field. For a promotion, the system populates the field with *Grade Advance.* For a transfer, the system populates the field with *Employee Request* and *Internal Recruitment.* For all other actions in the table, you can select individual reasons (for the action that you selected) or have the system select all reasons (for the action that you selected).

With the Japanese appointment reporting functionality, if you are recording a worker's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level has the higher sequence number and ensures that the system selects the changes for reporting on both the appointment notification and appointment list.

In addition, when you record job data changes with the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Termination
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for supervisor levels, and a reporting definition for departments. You then need to select only the **Refer to the Tree Manager** check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

Related Links

"Understanding PeopleSoft Security" (Application Fundamentals)

Common Element Used To Run Job Data Reports

Field or Control	***Description***
Show Components	Select if you want your report to display compensation component information.

(JPN) Appointment Notification JPN Page

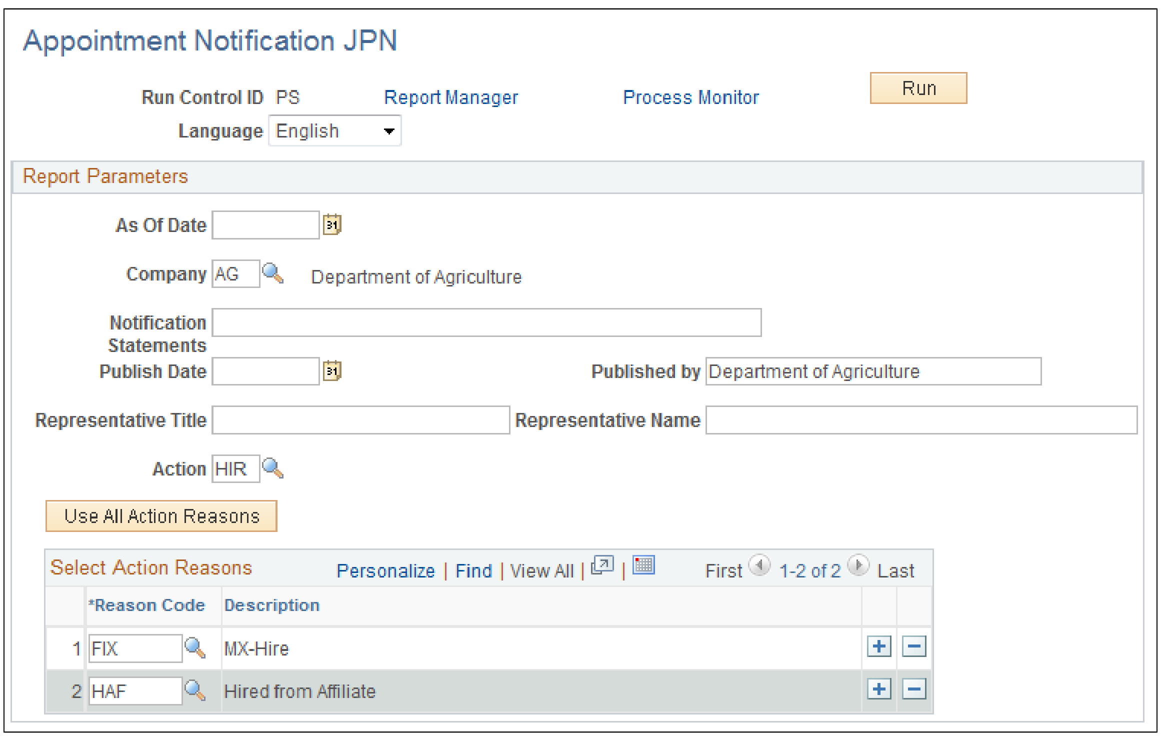
Use the Appointment Notification JPN page (RUNCTL_NTF_JPN) to run the JPN Appointment Notifications report (PER063JP).

Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Appointment Notification JPN** > **Appointment Notification JPN**

This example illustrates the fields and controls on the Appointment Notification JPN page. You can find definitions for the fields and controls later on this page.



Report headings vary according to the combination of action and reason. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

Field or Control	***Description***
Language	Select the language for the report.
As of Date	This is the effective date of worker job data rows that the system searches and report on. It appears on the report as the announcement date. **Note:** For termination notifications, enter the effective date of the termination row on the worker's job record. The system sets the announcement date on the printed notification as the **As of Date** minus 1 day, the same as the termination date on the worker's Employment Dates page.
Company	Select your company code. The company description appears by default in the **Published by** field.
Notification Statements	Enter any comments that you want to appear as an introduction to the list on the report: for example, *Hiring order is as follows.*
Publish Date	Enter the publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment notification.
Published by	Displays the description of the company that you entered, but you can override the default with a free-form description of, for example, your human resources department.
Representative Title	Displays the default from the company table. You can override the default. This is the title of the company's representative that appears on the notification.
Representative Name	Displays the default from the company table. You can override the default. This is the name of the company's representative that appears on the notification.
Action	Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

Field or Control	Description
Use All Action Reasons	Click this button unless you want to select individual reasons for the action that you entered in the **Reason Code** grid. Even if you selected individual reasons in the grid, if you click this button, the system loads all reasons. **Note:** You only need to select reasons (individual or all) for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the **Reason Code** field. However, the process reports only job rows that have a reason code. If a job row has an action of *Hire, Rehire, Termination, Transfer,* or *Promotion,* but no action reason, the system does not report it.
Reason Code	Select all the reasons for the action that you entered that you want the report to include. If the **Use All Action Reasons** check box is deselected, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the previous note that discusses the **Use All Action Reasons** field.

(JPN) Appointment List JPN Page

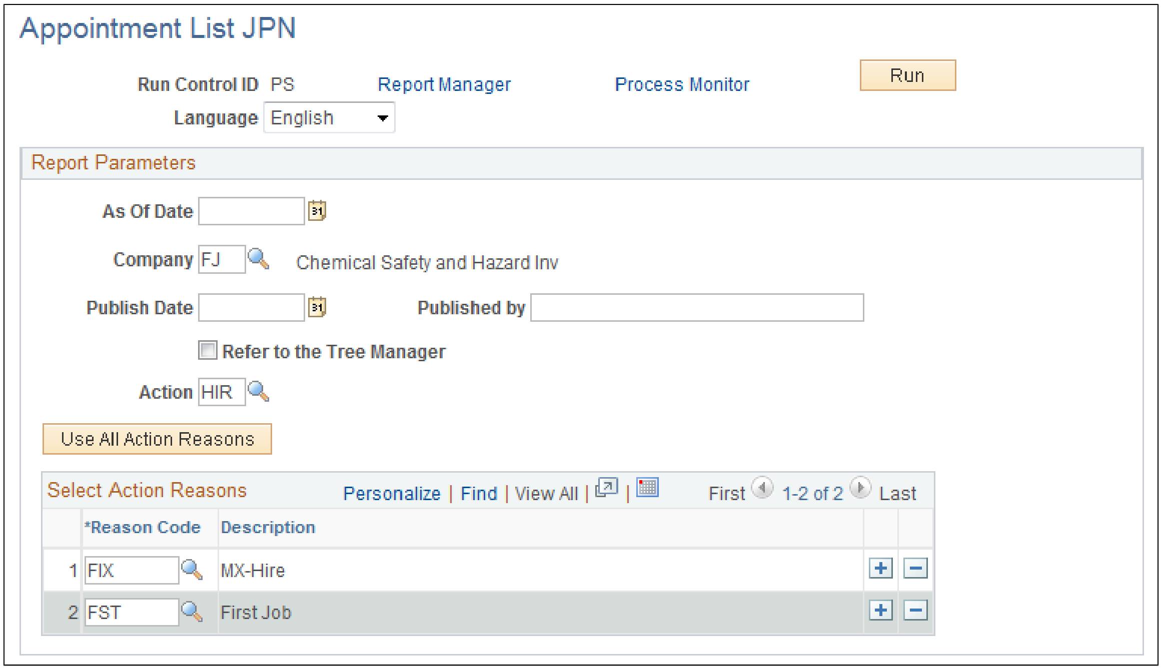
Use the Appointment List JPN page (RUNCTL_NTF2_JPN) to run the Appointment List JPN report (PER064JP), which generates an appointment list.

This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Appointment List JPN** > **Appointment List JPN**

This example illustrates the fields and controls on the Appointment List JPN page. You can find definitions for the fields and controls later on this page.



You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations that you want to report on.

Field or Control	***Description***
As Of Date	This is the effective date of worker job data rows on which the system will search and report. **Note:** For *Termination* listings, you should enter the effective date of the job termination row. The system sets the announcement date on the printed list as the **As Of Date** minus 1 day, the same as the termination date on the worker's Employment Dates page.
Company	Select your company code. Unlike for appointment notification, the company description does *not* appear by default in the **Published by** field.
Publish Date	Enter a publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment list.
Published by	Enter a free-form description of the publishing department, such as your human resources department.

Field or Control	***Description***
Refer to the Tree Manager	Select this check box if you want the system to sort the listing by using the DEPT_SECURITY tree and, depending on the action and reasons, the SUPERVISOR_LEVEL tree. This is how the system sorts the listing when you select this check box: • For actions *Hire* and *Rehire,* the system uses only the DEPT_SECURITY tree. • For actions *Transfer* and *Termination,* the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree. • For action *Promotion,* the system sorts by salary plan, salary grade, and employee ID, whether the check box is selected or deselected. Trees have no effect. If the **Refer to the Tree Manager** option is deselected, the system sorts the list by employee ID. **Note:** Workers who do not have a supervisor level appear in the list by department, with the **Supervisor Level** column blank. They are sorted by employee ID, after all the workers who do have a supervisor level.
Action	Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*
Use All Action Reasons	Click this button unless you want to select individual reasons for the action that you entered in the **Reason Code** grid. Even if you have selected individual reasons in the grid, if you click this button, the system loads all reasons. **Note:** You need to select reasons only for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the **Reason Code** field. However, the process reports only job rows that have an action reason. If a job row has an action of *Transfer* or *Promotion,* but no action reason, the system does not report it.
Reason Code	Select all the reasons for the action that you entered that you want the report to include. If you click the **Use All Action Reasons** button, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the note above for the **Use All Action Reasons** field.

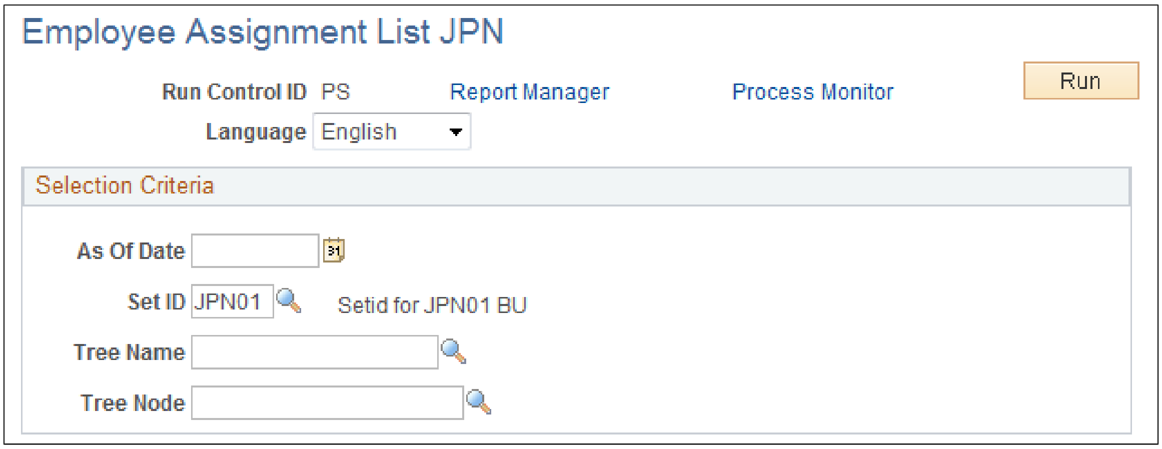
(JPN) Employee Assignment List JPN Page

Use the Employee Assignment List JPN page (RUNCTL_EMPLIST_JPN) to print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Employee Assignment List JPN** > **Employee Assignment List JPN**

This example illustrates the fields and controls on the Employee Assignment List JPN page. You can find definitions for the fields and controls later on this page.



This report lists workers by department and supervisor level, including workers with additional appointments.

To run the report, at least one department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by department, and then by workers:

- With supervisor levels registered in the Supervisor Level tree, in tree order.
- With supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Without supervisor levels, in alphanumeric employee ID order.

Note: The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL. If you have not defined a Supervisor Level tree with that name, sorting is in alphanumeric supervisor level order.

Viewing a Summary of All Job Records

This topic lists the page used to view a summary of all jobs records held by a person.

Page Used to View a Summary of All Job Records

Page Name	Definition Name	Usage
Multiple Jobs Summary Page	MULTIPLE_JOBS	View a summary of all jobs and changes in job status for people that have more than one employment record.

Refreshing Tables to Facilitate Reporting

These topics list the pages used to refresh tables to facilitate reporting, provide overviews of the process of refreshing the Employees table and the process of refreshing the Personal Data table, and list common page elements.

Pages Used to Refresh Tables to Facilitate Reporting

Page Name	Definition Name	Usage
Refresh EMPLOYEES Table - Parameters Page	RUNCTL_ASOFDATE	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data Page	PRCSRUNCNTL	This process rebuilds the Personal Data table after deleting all rows in the table. This process should only be run during an upgrade or installation.
Update Personal Data - Future Page	PRCSRUNCNTL	Run this process to update the Personal Data table for future dated information.
Ad-Hoc Process Request Page	PRCSRUNCNTL	Run several or all Administer Workforce reports that do not require parameters.
As-of-Date Request Page	RUNCTL_ASOFDATE	Run several or all Administer Workforce reports for which you specify an as of date.
Create Calendar Year Request Page	RUNCTL_CALENDARYR	Run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request Page	RUNCTL_FROMTHRU	Run several or all Administer Workforce reports for which you specify a from and through date range.

Understanding the Process of Refreshing the Employees Table

To generate standard PeopleSoft Human Resources reports quickly, many human resources reports retrieve data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Human Resources more efficient, this table combines information from the following records into an extract file:

Person Data Tables	***Job Data Tables***	***Other Tables***
• PS_PERSON • PS_PERS_DATA_EFFDT • PS_PERSON_NAME • PS_ADDRESSES • PS_PERSONAL_PHONE • PS_PERS_DATA_USA (USA data only) • PS_PERS_DATA_FRA (French data only)	• PS_JOB (Besides Work Location and Job Information, it also includes Job Labor, Payroll, Salary Plan, and Compensation) • PS_JOB_USF (Federal Only) • PS_JOBCODE_TBL • PS_DEPT_TBL	These additional records consist of tables related to organizational relationships, national identity, disability, and ethnic groups for the US and Asia pac. • PS_PER_ORG_ASGN • PS_PER_ORG_INST • PS_PERS_NID • PS_CITIZENSHIP • PS_DISABILITY • PS_DIVERS_ETHNIC • PS_ETHNIC_GRP_TBL

The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you add people or job records to the system or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports.

When you run this process, the system updates the Employees table with data that is valid before or on the as-of date that you specify. When retrieving data from setup components such as the Department component and Job Code pages, the system uses the effective date of the specific core setup table records that the data relates to.

The system uses the Employees table to run these reports:

- ABS001 (Employee Absence Report)
- ABS003 (Time Lost Due to Absence)
- ABS004UK (Bradford Report)
- BEN001 (Health Plan Participants)
- BEN002 (Life InsuranceParticipants)
- ESPP005 (ESPP Purchase Distribution)
- PAY110CN (Statistics-Canada [Educational Institutions])
- PER001 (Department Action Notices)
- PER002 (Employee Birthdays)

- PER004 (Emergency Contacts)
- PER005 (Employees on Leave of Absence)
- PER008 (Employee Review Audit)
- PER009 (Union Membership)
- PER011 (Competency Inventory)
- PER012 (Departmental Salaries)
- PER006 (Mailing Labels)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table Application Engine process (PER099) before running any of these reports so that the report contains all changes made to your employee files.

(USA) Understanding How the Employees Table Selects Ethnicity for U.S. Personnel

The PeopleSoft system enables you to enter more than one ethnicity group for people in the U.S.. You can select one or multiple ethnicities for a person within in USA section of the Regional page of Personal Data, however, you are not required to select a primary ethnicity.

The Refresh Employees Table Application Engine process (PER099) emulates the EEO-1 reporting process by reporting one ethnic group category: *Hispanic*, a single *Non-Hispanic Race*, or as having *Two or More Non-Hispanic Races*.

Consider the following when recording employee ethnicities:

- If the *Hispanic* ethnicity is entered for an employee, *Hispanic* it will be reported in the Ethnic Group column regardless of any other races entered.
- If the *Hispanic* ethnicity is not entered for an employee, and only one ethnicity is available, it will be reported as a single *Non-Hispanic Race* in the Ethnic Group column.
- If the *Hispanic* ethnicity is not entered for an employee, but if there are two or more non-Hispanic races indicated, it will signify as such in the *Two or More Races* field and leave the Ethnic Group field blank.

Understanding the Process of Refreshing the Personal Data Table

PeopleSoft Human Resources reports also retrieve data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees table, the Personal Data table is a report source only. It updates through the process described below. The Personal Data table is updated with changes to current data when the changes are made online. Future dated information is not updated unless a batch process is run. You may want to update the Personal Data table before running reports. You can update the Personal Data table for future dated information that has become current at any time without affecting the online updates.

Note: Do not run the Refresh Personal Data process, it interferes with online transactions.

Common Element Used When Refreshing Tables to Facilitate Reporting

Field or Control	***Description***
As Of Date	Indicate the **As Of Date** to run the processes. The process selects the new data based on the date that you enter and populates the table. It includes only workers who are active, on leave of absence, or suspended. The process excludes any *terminated* workers.

Running Database Audits

Database audits monitor changes, additions, or deletions made to sensitive fields such as salary amounts.

Page Used to Run Database Audits

Page Name	***Definition Name***	***Usage***
Database Audit Page	RUNCTL_FROMTHRU	Run the Database Audit report (PER029).

Chapter 11

Working with OnBoarding

Understanding OnBoarding

OnBoarding is the action or process of integrating new workers into an organization by providing a centralized location to enter all their personnel required data into the system. PeopleSoft OnBoarding provides a mechanism where workers can expedite their employment process so they can more readily transition into their job where they can now focus on the necessary knowledge, skills, and behaviors to become effective organizational members. The PeopleSoft OnBoarding pages consist of individual tasks, or steps, the worker needs to complete in accordance with his or her new job. After all the data is entered, the worker completes the OnBoarding processes and the data is automatically updated in the system.

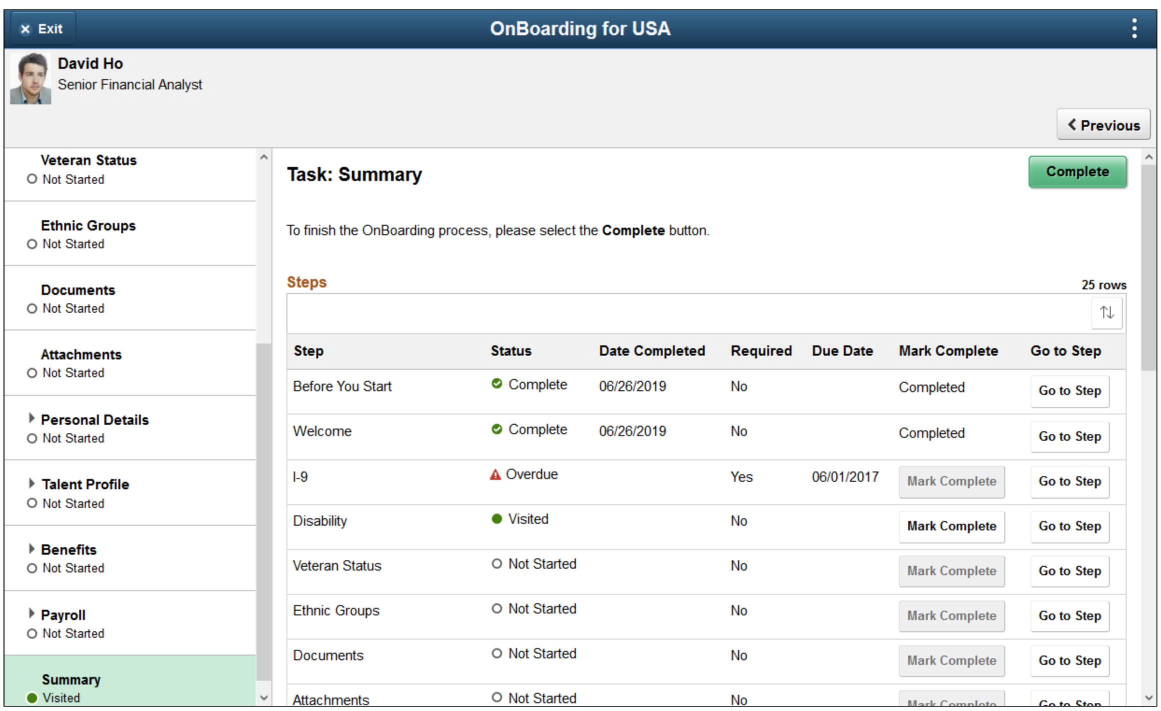
The following videos provide an overview and demonstration of how to use OnBoarding:

Video: PeopleSoft Fluid OnBoarding

Video: Image Highlights, PeopleSoft HCM Update Image 23: Employee OnBoarding

Video: Image Highlights, PeopleSoft HCM Update Image 24: Addition of Manager View of OnBoarding

This example illustrates the layout of the OnBoarding component showing the Summary page.



The PeopleSoft OnBoarding feature:

- Enables template administrators to set up templates using the Activity Guide Composer to identify the steps and data required from the workers.

Provides a Template Assignment engine where you define your organizational rules on how to automatically assign the appropriate template to a person.

- Gives OnBoarding administrators the ability to automatically assign the OnBoarding role to users, manage template assignments, and maintain document configurations and worker document uploads.
- Notifies workers that the OnBoarding process is available and provides a link to the OnBoarding dashboard, where they can enter the specified data from one location.
- Enables managers to view the status of their employee’s OnBoarding activities.

Related Links

“Understanding the Activity Guide Composer” (Enterprise Components)

Managing OnBoarding

Accessing the PeopleSoft OnBoarding Dashboard and Pages

Using OnBoarding Pages

Viewing OnBoarding Activity Statuses as a Manager

Setting Up Activity Guides for OnBoarding

PeopleSoft OnBoarding uses activity guides, which provides your workers with a simplified and streamlined approach to complete the OnBoarding business process. Activity guides track and maintain a user's progress as he or she performs prescribed tasks, or steps. PeopleSoft OnBoarding uses the PeopleSoft Activity Guide Composer framework that is designed to improve the deployment and management of fluid activity guides. This framework provides utilities and configurable steps that are commonly utilized in activity guides.

Although the PeopleSoft application delivers several ready to use OnBoarding templates, your organization may clone or define your own templates that you can assign to your workforce.

These topics provide an overview of Activity Guide Composer setup tables for OnBoarding, working with OnBoarding categories and templates, customizing categories and templates, and working with template assignments.

Related Links

“Understanding the Activity Guide Composer” (Enterprise Components)

Understanding the Activity Guide Composer Setup Tables for OnBoarding

To support your OnBoarding process, you will use the following steps to configure and assign OnBoarding activity guide templates to your new hires. For more detailed information on these procedures, see the corresponding documentation.

1. Set Up Activity Guide Categories

   Categories contain the technical components that are utilized to define an activity guide template. For example, categories contain the technical definition of one or more steps that can be included in an activity guide. See the “Setting Up Activity Guide Categories” (Enterprise Components) documentation and the Working with OnBoarding Categories topic below.

2. Create Activity Guide Templates

   Activity guide templates identify the exact configuration and steps end users will follow to complete their OnBoarding experience. Activity guide templates are created and managed by template administrators—functional personnel who are very familiar with your organization's HR transaction processes. See “Managing Activity Guide Templates” (Enterprise Components) documentation and the Working with OnBoarding Templates topic below.

3. Configure Documents

   Documents can be associated with your OnBoarding activity guide templates and enable your employees to download and view, take action, or attach documents that are vital to the employment process. See the Configure Documents - Documents Page and Configure Documents - Templates Page.

4. (Optional) Set Up Template Assignment

   Template Assignment is a feature within the Activity Guide Composer framework that enables you to define tables and rules to automatically assign activity guide templates. See the “Setting Up Activity Guide Utilities for Template Assignment” (Enterprise Components) documentation and the Working with Template Assignments topic below.

5. Define OnBoarding Installation Settings

   Use the OnBoarding Installation table to assign OnBoarding information to a worker. This includes the role, notification template, activity guide category, attachment storage location, and how to assign an OnBoarding template (by using a default template or the Template Assignment feature). See the OnBoarding Installation Page documentation.

   Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
   Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
   Notifications delivered with HCM Image 47 or later must use Notification Composer.
   For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

   ---

6. Manage OnBoarding Events (as needed)

   Use the Manage OnBoarding Event page to add an OnBoarding activity guide trigger for a person who is missing a job assignment trigger or to correct an incorrect template assignment. See the Manage OnBoarding Event Page.

   Note: An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed.

Working with OnBoarding Categories

A category definition contains the properties, contextual data, steps, and other options that can be included in an activity guide template. You will use the Categories component to associate these steps to a related content service that navigates the user to an application transaction page to perform a specific task. Not all steps need be included in a template, but all possible steps must be included in the category to be considered for a template. For example, you may have a step for workers to add their address, another to enter dependent data, one for US worker to grant W-2 and W-2c consent, and a step for Canadian workers to grant T4/T4 slip consent. The template administrator will then determine which steps to include in a template. In this scenario, the template administrator would create two templates, one for the US workers and one for the Canadian workers, and only include the steps relevant to workers in that country.

The PeopleSoft application delivers the *OnBoarding* activity guide category.

Delivered OnBoarding Category Steps

The following table lists the delivered steps for the *ONBOARDING* category:

Step	***Description***	***Additional Information***
ACA_1095_CONSEN	ACA 1095–Consent	
ACKNOWLEDGEMENT	Acknowledgement	The system delivers the *OB1* parameter value as temporary data for this step as the acknowledgement parameter under the Additional Step Content section of the “AG Composer Categories - Steps Page” (Enterprise Components). --- **Important!** You will need to change the parameter based on the Acknowledgement ID you create using the Acknowledgement Framework. --- For information on Acknowledgement Framework, see “Understanding the Acknowledgement Framework” (Enterprise Components).
BANK_ACCT_DSTRB	Banking	
BENEFITS_ENROLL	Benefits Enrollment	
BEN_ENROLL_FL	Fluid Benefits Enrollment	
COMPETENCIES	Competencies	

Step	Description	Additional Information
COPY_JOB_ITEMS	Copy Job Profile Items	**Note:** This step will display profile items from all the job profiles associated with the employee's job. Through this step, the employee can add the profile items to his or her own profile. See also "Accessing Additional Profile Actions" (PeopleSoft eDevelopment) and "Copy Job Items Page" (PeopleSoft eDevelopment).
DEGREES	Degrees	
DEPBENEFICIARY	Dependent/Beneficiary Info	
DIRECT_DEPOSITS	Direct Deposits	
DIRECT_DEPOSITS_FL	Fluid Direct Deposits	
DISABILITY	Disability	
DOC_DOWNLOAD	Documents	The download Documents step is preconfigured for the OnBoarding process. All preconfigured documents matching the template will be selected for this step regardless of an assigned Document Group when no Related Data, Data Field 1 value on the "AG Composer Categories - Steps Page" (Enterprise Components) is specified.
DOC_DOWNLOAD1	Documents - Group 1	The system delivers the *DOCGROUP1* document group and this value is associated with the *DOC_DOWNLOAD1* step under the Related Data section, Data Field 1 field on the "AG Composer Categories - Steps Page" (Enterprise Components). If you use different document groups then the ones that are delivered, you will need to update the data field value based on the document groups you create.

Step	***Description***	***Additional Information***
DOC_DOWNLOAD2	Documents - Group 2	The system delivers the *DOCGROUP2* document group and this value is associated with the *DOC_DOWNLOAD2* step under the Related Data section, Data Field 1 field on the "AG Composer Categories - Steps Page" (Enterprise Components). If you use different document groups then the ones that are delivered, you will need to update the data field value based on the document groups you create.
DOC_UPLOAD	Attachments	
EMERGEN_CONTACT	Emergency Contacts	
ETHNIC_GROUPS	Ethnic Groups	
I9	I-9	
INTRODUCTION	Before to start video	
LICENSE_CERTIFI	Licenses and Certifications	
LM_SS_LEARNING	My Learning	You must have the Enterprise Learning application installed and configured to view data on this page. When this configuration is incomplete, the page will display the message that data is not available.
MARITAL_STATUS	Marital Status	
PHOTO_UPLOAD	Photo / Preferred Name	
RL1_RL2_CONSENT	RL1/RL2 Consent	
SUMMARY	Summary	

Step	*Description*	*Additional Information*
SURVEY	OnBoarding Survey	Surveys are set up using the Questionnaire framework. For more information on this, see “Understanding Questionnaire Framework” (Enterprise Components).
T4_T4A_CONSENT	T4/T4A Consent	
T4_T4A_CONS_FL	T4/T4A Consent (Fluid version)	
TAX_WITHHOLDING	Tax Withholding	
VERIFY_ADDRESS	Verify Addresses	
VERIFY_ADT_INIFO	Verify Additional Information	
VERIFY_CONT_DTL	Verify Contact Details	
VERIFY_NAME	Verify Name	
VETERAN_STATUS	Veteran Status	
VOLUNTARY_DEDUC	Voluntary Deductions	
W2_W2C_CONSEN	W-2/W-2C Consent	
WELCOME_VIDEO	Welcome Video	

Related Links

“Setting Up Activity Guide Categories” (Enterprise Components)
“Cloning Activity Guide Categories” (Enterprise Components)

Working with OnBoarding Templates

The Activity Guide Composer uses fluid pages to create templates that identify the steps a user should take to perform a transaction or process. You will use the Activity Guide Composer - Templates component to define the activity guide layout, assign a category, identify the security roles that can access the OnBoarding templates and activity guides, identify actions the user can take, and identify the steps that a new employee would need to complete during the OnBoarding process.

PeopleSoft HCM delivers the following, ready to use, OnBoarding activity guide templates.

- (USA) *OBDUSA1 – OnBoarding for USA*
- (CAN) *OBDCAN1 – OnBoarding for CAN*
- *OBDSTND – Standard OnBoarding*

Delivered OnBoarding Template Steps

All delivered templates use the vertical non-sequential layout that has the navigation steps appear in the left panel of the page.

The following table lists the delivered steps for the delivered OnBoarding templates:

Template	***List of Page Steps***
OBDCAN1 – OnBoarding for CAN	(CAN) Completing OnBoarding Activity Guides for Canadian Workers
OBDSTND – Standard OnBoarding	Completing the Standard OnBoarding Activity Guide
OBDUSA1 – OnBoarding for USA	(USA) Completing OnBoarding Activity Guides for US Workers

Related Links

“Managing Activity Guide Templates” (Enterprise Components)

Customizing Categories and Templates

Although the application delivers categories and templates for your OnBoarding activity guides, you have the ability to:

- Create your own categories and templates.
- Use the delivered data as a starting point for your own categories and activity guide templates.

The fields for delivered data are disabled and unavailable for update. Although you cannot update the delivered data, you can make modifications to delivered or existing categories and templates to suit your organization's needs. This is done by using one of these methods and making the modifications:

- Inserting a new effective dated row.
- Cloning a category or template.

Warning! When you make modifications to a template (by either inserting a row or cloning), you cannot change the activity guide type (layout) or category. To have a template that does not use the same layout type or category, you will need to create a new template instead of cloning or inserting a new effective dated row.
For more information on setting up activity guide categories or templates, see the “Setting Up Activity Guide Categories” (Enterprise Components) and “Managing Activity Guide Templates” (Enterprise Components) documentation.

Considerations for Configuring Categories for Your Environment

If you want to use the delivered categories as a basis for your OnBoarding categories, or create your own, consider the following:

- OnBoarding categories should always use the *EMPLID* and *EMPL_RCD* context key fields. The OnBoarding template creation process makes the assumption that an OnBoarding process is created for a job assignment.
- You should always have a Summary step that can be included as the last step in the activity guide process where users can review their progress and mark the activity guide as complete.
- To add or remove steps from an existing category, you will need to add a new effective dated OnBoarding category row and add or delete the steps.

  Important! If you do this for a category that is already associated with a template, you will need to insert a row in the template with a date equal to or later than the row with the new or deleted step to apply those changes to your template. The system will not automatically insert the step into the template, but you can now opt to include this new step into the template.

  For example, you want to add a new step to the *ONBOARDING* category that enables an employee to enter their car information for parking purposes. Access the *ONBOARDING* category and insert a new effective dated row of January 1, 2017. In order to add that new step to your OnBoarding templates, you will need to insert an effective dated row equal to or greater than January 1, 2017 to see that new step you added to the category. To insert the new row in the template, access the “Activity Guide Composer - Select Steps Page” (Enterprise Components). The new step will be available to add to the template.
- You can clone the delivered *OnBoarding* category by accessing the “Clone Category Page” (Enterprise Components), selecting the category and effective dated row you want to copy, enter the new category details, and click **Clone Category** to save a copy of the category. You will need to navigate to the Categories component where you can update this new category (see “Setting Up Activity Guide Categories” (Enterprise Components)).

Considerations for Configuring Templates for Your Environment

If you want to use the delivered templates as a basis for your OnBoarding templates, consider the following:

- In order to make modifications to delivered templates, access the “Activity Guide Templates Page” (Enterprise Components) and do one of the following:
  - Insert a new effective dated row by clicking the **Update Template** button to access the “Update Template Page” (Enterprise Components) and click the Add button, This will insert a new

effective dated row where you can enter the new date. Apply the change and click the **Update Template** button to access the template and make the changes.

- Clone a delivered OnBoarding template by clicking the **Clone Template** button for the desired template. On the "Clone Template Page" (Enterprise Components) select the effective dated row you want to copy, enter the new template details, and click Continue to save a copy of the template. You will be returned to the Activity Guide Templates page where you can select to update this template.

Note: These actions will copy all the configuration setup for this template, including the status of the template at the time of inserting a row or cloning. You can change the auto save functionality, security roles, actions, step configuration, and status, but you cannot change the activity guide layout type and category.

To inactivate a delivered template, insert a row with a new effective date, access the "Activity Guide Composer - Review and Activate Page" (Enterprise Components) and click the **Deactivate Activity Guide** button.

- If you do not want to use the same category or activity guide type (layout style) as an existing template, create a new template instead of cloning or inserting a new effective dated row.
- If you have documents that *must* be acknowledged, updated and uploaded, or just uploaded, make the document-related steps (Documents, Attachments, and so forth) required on the "Configure Attributes Page" (Enterprise Components).
- You should always have a Summary step that can be included as the last step in the activity guide process where users can review their progress and mark the activity guide as complete.

Working with Template Assignments

The Activity Guide Composer framework provides you with the ability to configure rules to determine which OnBoarding template that should be assigned to a person. This is configured through the Activity Guide Utilities - Template Assignment feature. For detailed information on setting up template assignments, see the corresponding documentation.

To set up template assignments for OnBoarding:

1. Identify source criteria fields that are derived from the key structure of a source table using the "Search Key Source Tables Page" (Enterprise Components).
2. Identify search key source configurations using the "Search Keys Page" (Enterprise Components).
3. Enter search keys and values for the template assignment definition in the Template Assignment component ("AG Composer Tmplt Asgnmt - General Page" (Enterprise Components) and "AG Composer Tmplt Asgnmt - Template Assignment Page" (Enterprise Components)).
4. Test the Template Assignment process using the "Test Template Assignment Page" (Enterprise Components).
5. Set up the OnBoarding Installation Page to use the Template Assignment feature to customize which OnBoarding activity guide templates are assigned to individuals.

Delivered Search Keys Source Tables

The following table lists the delivered search key source tables for template assignment, but you can add your own:

Search Key	***Description***
BEN_PROG_PTC_VW	Employee Benefit Programs
JOB	Employee Job History
JOB_ACTION_VW	Job - Action view
JOB_ACTRSN_VW	Job - Action Reason view
JOB_JOBCD_VW	Job - Jobcode view
JOB_POSN_VW	Job - Position view

Delivered Search Keys

The following table lists the delivered search keys for template assignment, but you can add your own:

Search Key	***Description***
ACTION	Action
ACTION_REASON	Action Reason
ACTION_TYPE	Action Type
ACTN_REASON_TYPE	Action Reason Type
BENEFIT_PROGRAM	Benefit Program
BUSINESS_UNIT	Business Unit
COMPANY	Company
DEPARTMENT	Department

Search Key	Description
EMPLOYEE_TYPE	Employee Type
FULL_PART_TIME	Full/Part Time Indicator
GRADE	Salary Grade
JOBCODE	Job Code
JOB_FAMILY	Job Family
JOB_FUNCTION	Job Function
LOCATION	Location
PER_ORG	Organization Relationship
POSITION	Position
REG_REGION	Regulatory Region
UNION	Union

Managing OnBoarding

To manage OnBoarding, use the OnBoarding Installation (HR_OBD_INSTALL), Document Groups (HR_OBD_DOC_GRP), Configure Documents (HR_OBD_CFG_DOC), Employee Documents (HR_OBD_EMP_DOCS), Manage OnBoarding Event (HR_OBD_EMP_TMPLS), OnBoarding Status (HR_OBD_ADMIN_FL), Document Groups (HR_OBD_DOC_GRP), Configure Documents (HR_OBD_CFG_DOC), and Employee Documents (HR_OBD_EMP_DOCS) components.

Note: Both OnBoarding and OffBoarding use the Document Groups (HR_OBD_DOC_GRP), Configure Documents (HR_OBD_CFG_DOC), and Employee Documents (HR_OBD_EMP_DOCS) setup components, which pertain only to the Documents and Attachments steps of these types of activity guides. Other pages where attachments are available use the Attachments Framework and do not use these setup and file management components.

These topics give an overview of OnBoarding triggers and handlers, document groups, and discuss how to set up OnBoarding tables.

Related Links

Managing OffBoarding

Pages Used to Manage OnBoarding

Page Name	*Definition Name*	*Usage*
OnBoarding Installation Page	HR_OBD_INSTALL	Identify the OnBoarding role, notification template, activity guide category, attachment location, default template or template assignment definition.
Document Groups Page	HR_OBD_DOC_GRP	Define document groups for organizing your documents.
Configure Documents - Documents Page	HR_OBD_CFG_DOC	Set up document configuration for activity guides (i.e.- OnBoarding and OffBoarding), such as the types of documents to view or upload, if an employee needs to take action on the document, and attach documents.
Configure Documents - Templates Page	HR_OBD_CFG_DOC_TMP	Identify which templates should display this document.
Employee Documents Page	HR_OBD_EMP_DOCS	View the documents that workers have acknowledged or uploaded **Note:** This is only for Attachments and Documents steps and not for attachments uploaded in other steps.
Manage OnBoarding Event Page	HR_OBD_EMP_TMPLS	Add a trigger for a person who is missing a job assignment trigger or correct an incorrect template assignment.
OnBoarding Status Page (for Administrators)	HR_OBD_STATUS_FL	View and take action on a worker's progress for an OnBoarding process as an administrator.

Note: You will need to assign the delivered *OnBoarding Administrator* role to users to grant them access to these pages.

Understanding OnBoarding Triggers and Handlers

The handler, CreateTriggerOBD, is part of the Event Manager *AssignmentAdded* event (**Enterprise Components** > **Events & Notifications** > **Event Framework** > **Event Registry**). The *AssignmentAdded* event is raised for the following Job Data actions:

- *Employee*:
  - *Hire*
  - *Additional Job*
  - *Rehire*
- *Contingent Worker*:
  - *Add Contingent Worker*
  - *Renewal*

Note: OnBoarding is not available for persons of interest (POIs).

The handler will do three things:

- Add the OnBoarding role, as defined on the OnBoarding Installation Page, to the person's user profile provided a user ID was assigned to the person before the assignment was added.
- Add or update a trigger on the Manage OnBoarding Event Page.

  Note: This page enables HR administrators to access triggers, update the template ID, delete the trigger and OnBoarding process, or add a trigger, if necessary. An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed.
- Send a notification to the email address stored on the person's user profile, if there is one. This will use the OnBoarding notification template defined on the OnBoarding Installation Page.

Important! The PeopleSoft system delivers the Event Manger OnBoarding handler (*HR_OBD_EM_HANDLER*) for the *AssignmentAdded* and *AssignmentTerminated* events as inactivate.
If your organization is implementing the OnBoarding feature, you will need to set the status to *Active* for these handlers.
For information on the Event Manager and handlers, see the documentation for *Events and Notifications Framework.*

Related Links

"PeopleSoft Events and Notifications Framework Overview" (Events and Notifications Framework)

"Understanding Event Setup" (Events and Notifications Framework)

Understanding Document Groups

Document groups combine like documents into separate categories that you can then associate with different steps within your activity guide processes (i.e.- OnBoarding and OffBoarding). For example, say you want to differentiate your documents into two different groups. The application delivers the *DOCGROUP1* and *DOCGROUP2* groups for this purpose. You then associate the *DOCGROUP1 - Document Group 1* group to company handbook-related files, and the *DOCGROUP2 - Document Group 2* group you link to documents related to other materials needed for employment.

You link a document to a group using the Configure Documents - Templates Page for each document that should be associated with a group. To have these appear as two different steps within activity guide process, groups must be associated with steps within the category.

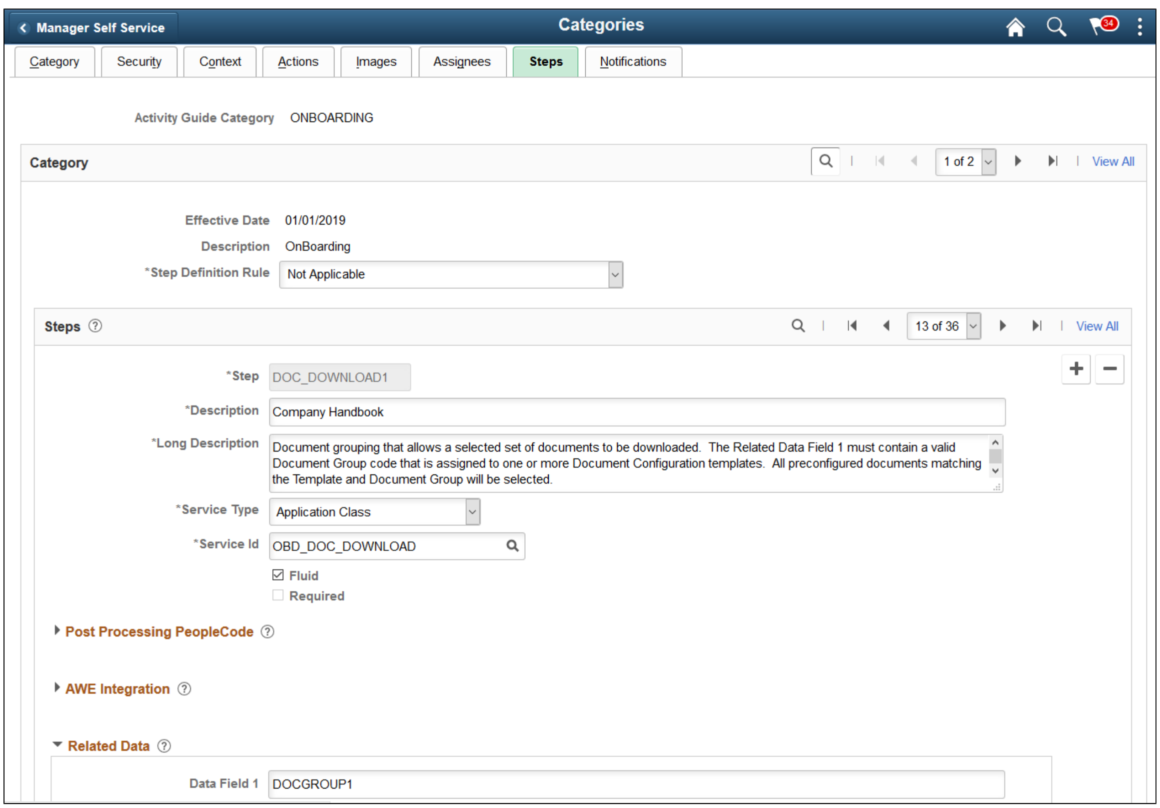
Note: The system delivers the *ONBOARDING* category with the *DOC_DOWNLOAD1* step already associated with the *DOCGROUP1* group and the *DOC_DOWNLOAD2* step already associated with the *DOCGROUP2* group.

If you want to create your own document groups, you will need to do the following:

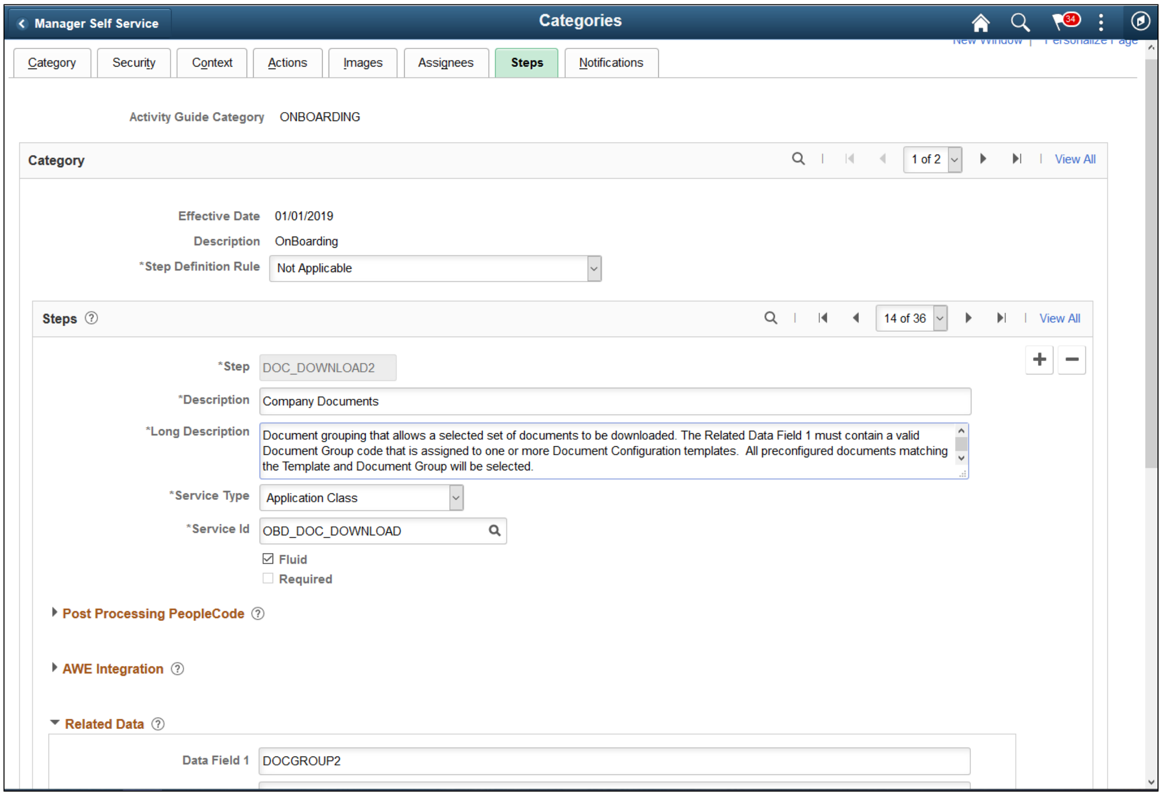
1. Create your own groups using the Document Groups Page.
2. Link groups to each document type on the Configure Documents - Templates Page.
3. Use the “AG Composer Categories - Steps Page” (Enterprise Components) to enter the each group as a **Data Field** value under the Related Data section for the corresponding step.

   Note: If you are linking them to the delivered *DOC_DOWNLOAD1* and *DOC_DOWNLOAD2* steps that are part of the *ONBOARDING* category, update the Data Field values to reflect these new groups.

This example demonstrates how the “AG Composer Categories - Steps Page” (Enterprise Components), **Related Data** section, displays the *DOCGROUP1* group as the **Data Field 1** value for the *DOC_DOWNLOAD1* Steps row. Note that the step description was updated for purposes of this example to reflect what you might want to display to the end user as the activity guide process step.



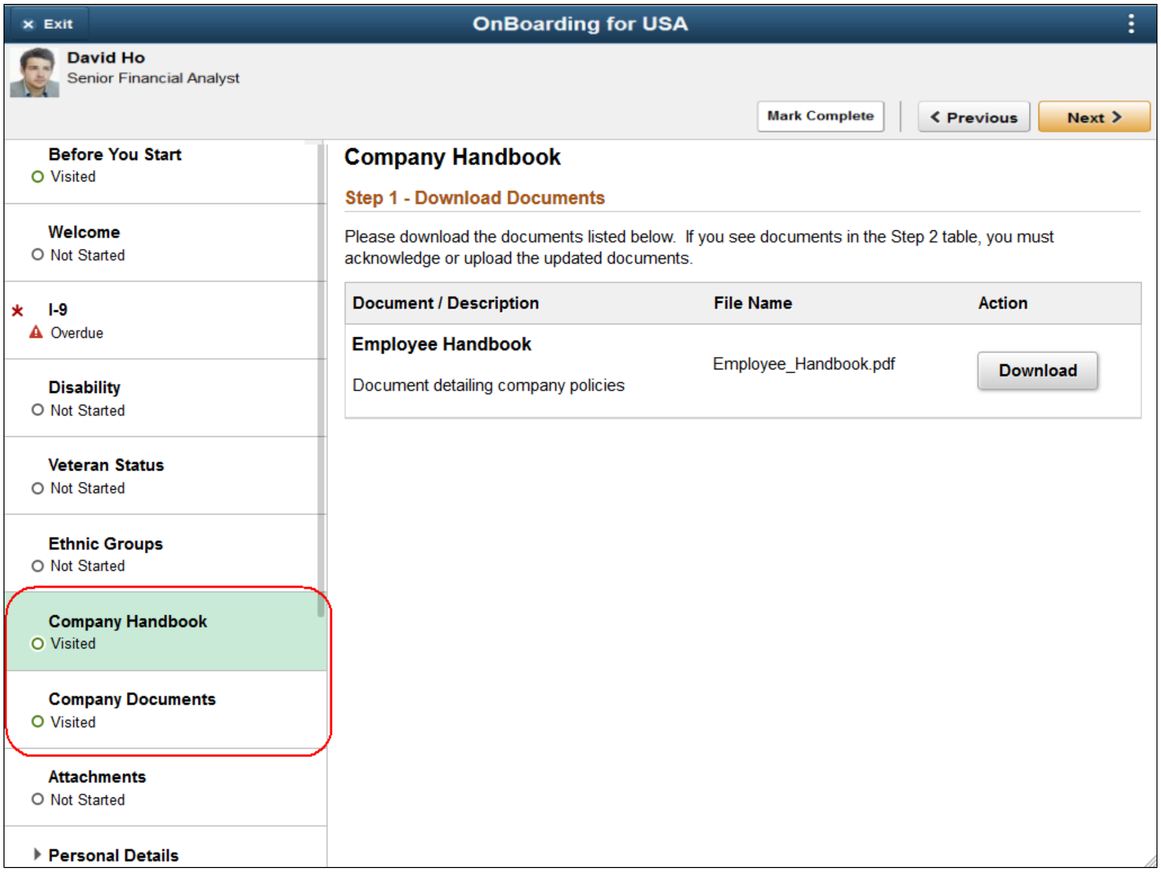
On the *DOCGROUP2* Steps row, the group value *DOCGROUP2* is the **Data Field 1** value. Note that the step description was updated for purposes of this example to reflect what you might want to display to the end user as the activity guide process step.



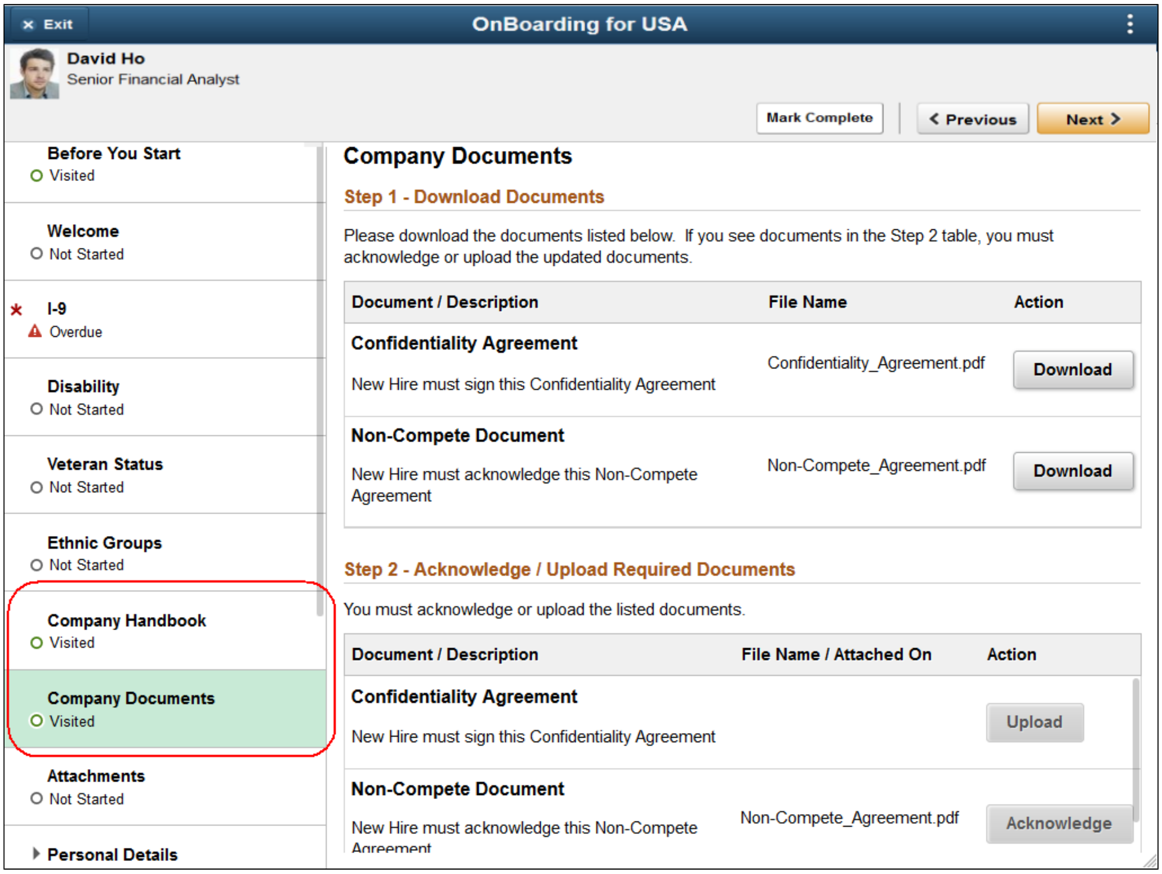
Because each step is associated with a different group, when you create and deploy activity guide templates using both steps, the system will display two different steps, each showing only those documents tied to the group in that step.

Note: If a Document Group value is not specified in the **Data Field** for the category step, then all documents configured for the template will be included, regardless of the Document Group link configuration on the Configure Documents - Templates Page.

When an employee accesses the activity guide process pages, he will see the two different steps, as shown here. Each steps shows only those documents linked to the group that is specified in the category step. In this scenario, the employee will see only the handbook documents (those in document group *DOCGROUP1*) on the *Company Handbook* step.



However, the *Company Documents* step displays those documents and requirements linked to the *DOCGROUP2* document group.



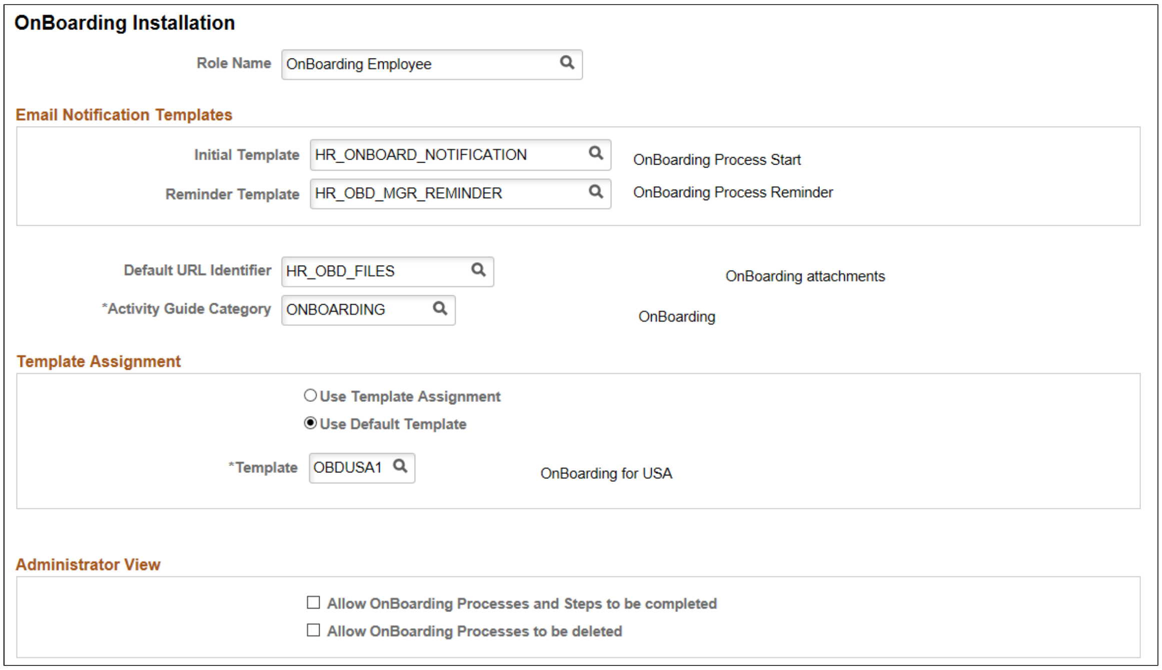
OnBoarding Installation Page

Use the OnBoarding Installation page (HR_OBD_INSTALL) to identify the OnBoarding role, notification template, activity guide category, attachment location, default template or template assignment definition.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the HR Administration Tile, then select OnBoarding, then the OnBoarding Installation page item tab from the left panel.
- **Set Up HCM** > **Install** > **Product Specific** > **OnBoarding Installation** > **OnBoarding Installation**

This example illustrates the fields and controls on the OnBoarding Installation page.



Field or Control	***Description***
Role Name	Define the OnBoarding role that should be assigned to employees when an event trigger is initiated from Job Data. The PeopleSoft application delivers the *OnBoarding Employee* role to access the OnBoarding pages. You can also create and enter your own role to access the OnBoarding page. This role is needed to access the OnBoarding tile and some of the OnBoarding components. To take advantage of the auto assignment functionality, you must: 1. Add the person into the system. 2. Prior to assigning a job instance, create a user profile (PeopleTools, Security, User Profiles, User Profiles). 3. Assign a job to the worker (Workforce Administration, Job Information, then select either Add Employment Instance or Add Contingent Worker Instance). **Important!** If you do not create a user ID prior to adding a job assignment, you will need to manually add the *OnBoarding Employee* role to the user profile. Roles for a template are assigned on the "Activity Guide Composer - Security Page" (Enterprise Components). **Note:** The role name that is assigned to the user profile must match the role that is specified for the *End User* security type on the "Activity Guide Composer - Security Page" (Enterprise Components).

Email Notification Templates

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

If you have enabled EO Notification Composer, the **Email Notification Templates** section will be hidden on this page and OnBoarding will leverage the following notification events defined in Notification Composer:

- *OnBoardingStart* - OnBoarding Process Start
- *OnBoardingReminder* - OnBoarding Process Reminder

Field or Control	***Description***
Initial Template	Identify the initial template to be used to send email notification to workers and inform them that they can begin the OnBoarding process. The PeopleSoft application delivers the *HR_ONBOARD_NOTIFICATION* template but you can create and add your own template here.
Reminder Template	Identify the email template that will be used to send a reminder to the employee when a manager or administrator clicks the **Remind Employee** button on the OnBoarding Status Page (for Managers) or OnBoarding Status Page (for Administrators). You can use or update the delivered *HR_OBD_MGR_REMINDER* template per your organization's requirements, or you can create a template of your own and enter it here. This video demonstrates setup to support the notification feature on the OnBoarding Activities page for managers: Video: Image Highlights, PeopleSoft HCM Update Image 24: Addition of Manager View of OnBoarding
Default URL Identifier	Enter the default URL identifier that will be used by the document configuration process (Configure Documents - Documents Page) to store OnBoarding downloadable documents and attachments. The PeopleSoft application delivers the *HR_OBD_FILES* URL identifier to store OnBoarding attachments in the HR_OBD_FILES record.

Field or Control	*Description*
Activity Guide Category	Indicate the Activity Guide Composer category that should be used for OnBoarding. Only those templates that use this category will be available when assigning templates to a worker. The PeopleSoft application delivers the *ONBOARDING* category and the delivered templates are assigned to this category. The category is assigned to a template on the "Activity Guide Composer - General Information Page" (Enterprise Components).

Template Assignment

Field or Control	*Description*
Use Template Assignment and **Template Assignment**	When you select the **Use Template Assignment** option, the **Template Assignment** field appears. Select this option to indicate that the system should automatically determine the template that should be assigned to a worker using the Template Assignment engine. The system will use the Template Assignment ID you enter here, which defines the rules for automatically assigning templates to workers. For more information on the Template Assignment process, see the "AG Composer Tmplt Asgnmt - Template Assignment Page" (Enterprise Components).
Use Default Template and **Template**	When you select the **Use Default Template** option, the **Template** field appears. Select this option to indicate a default template that should be assigned to all workers when an event triggers the process. The PeopleSoft application delivers *ODBUSA1* (OnBoarding for USA) as the default template, but you can change this value. For additional information on OnBoarding triggers, see the Understanding OnBoarding Triggers and Handlers topic.

Administrator View

Use this section to define which buttons should be available on the OnBoarding Status Page (for Administrators).

Field or Control	*Description*
Allow OnBoarding Process and Steps to be completed	Select this check box to enable the administrator to mark individual steps or an entire OnBoarding process as *Complete*. When selected, the **Complete** button will appear at the top of the page and a **Mark Complete** button for each step when an OnBoarding process has a status of *In Progress*. These buttons will not be available for OnBoarding processes with a status of *Complete* or *Not Started*.
Allow OnBoarding Process to be deleted	Select this check box to enable the administrator to delete an OnBoarding process for an employee. When selected, the **Delete** button will appear for OnBoarding processes with a status of *Complete* or *In Progress*. The **Delete** button will not be available for OnBoarding processes with a status of *Not Started*.

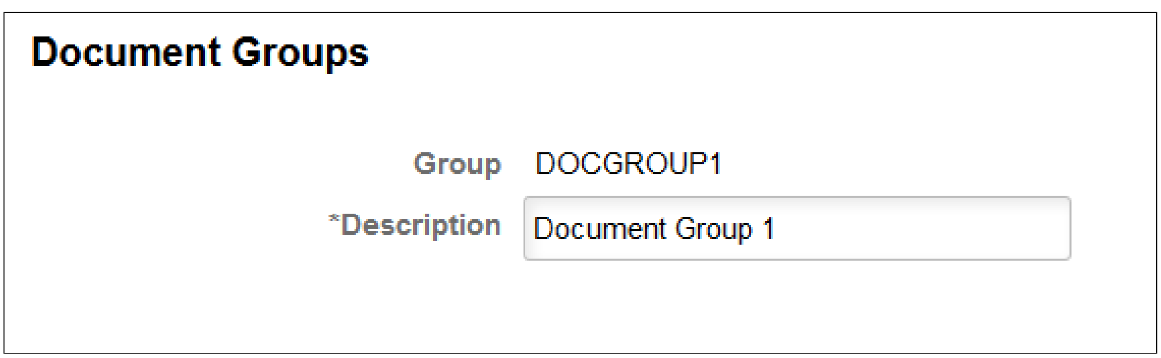
Document Groups Page

Use the Document Groups page (HR_OBD_CFG_DOC) define document groups for organizing your documents.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then select OnBoarding or OffBoarding, then the Document Groups page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OnBoarding** > **Document Groups** > **Document Groups**

This example illustrates the fields and controls on the Document Groups page.



Use this page to identify document group names. You can then associate documents to these groups on the Configure Documents - Templates Page.

Note: The PeopleSoft application delivers the *DOCGROUP1* and *DOCGROUP2* document groups. These values are associated with the *DOC_DOWNLOAD1* and *DOC_DOWNLOAD2* steps respectively under the Related Data section, Data Field 1 field on the “AG Composer Categories - Steps Page” (Enterprise Components) of the *ONBOARDING* category.
If you create and use different document groups then the ones that are delivered, you will need to update the data field values on the Categories - Steps Page based on the document groups you create.

For more information on using document groups, see the Understanding Document Groups section in this documentation.

Related Links

Managing OffBoarding

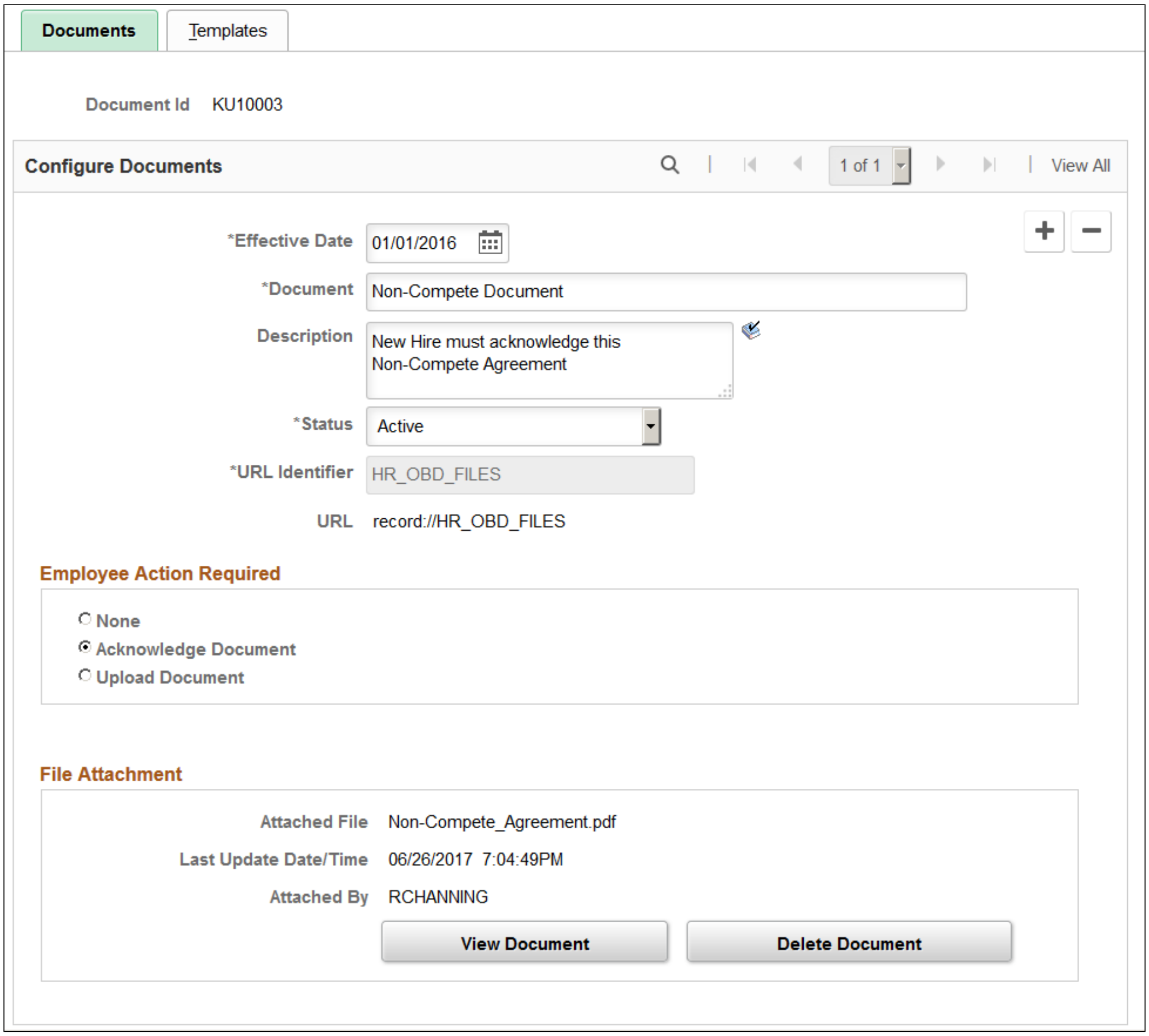
Configure Documents - Documents Page

Use the Configure Documents - Documents page (HR_OBD_CFG_DOC) to set up document configuration for activity guide processes (i.e. - OnBoarding and OffBoarding), such as the types of documents to view or upload, if an employee needs to take action on the document, and attach documents.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then select OnBoarding or OffBoarding, then the Configure Documents page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OnBoarding** > **Configure Documents** > **Documents**

This example illustrates the fields and controls on the Configure Documents - Documents page.



Use this page to define the types of documents you will provide for the worker or that a worker may need to upload. You will assign documents to your templates on the Configure Documents - Templates Page. This information will be used when a worker accesses the document steps (see also Documents Page) during the activity guide process.

Field or Control	***Description***
Document	Enter the name of the document. This will appear as the heading of the row that appears for the worker on the documents page.
Description	Enter a description of the document type. This description will appear under the document header (see the **Document** field) and will clarify the purpose of the document.

Field or Control	*Description*
URL Identifier and **URL**	This value defaults form the OnBoarding Installation Page but you can override this value. After you save, this field is no longer available for edit. Enter the URL identifier that will be used to store activity guide downloadable documents and attachments for this document type. The PeopleSoft application delivers the *HR_OBD_FILES* URL identifier to store activity guide attachments in the HR_OBD_FILES record.
Employee Action Required	Select one of the following worker actions that a worker should take from the Documents Page: • *None*: Select this option when no action is required from the worker. The document will be available within the **Step 1 - Download Documents** section of the Documents page. The employee will be able to download this document but no further action is required. • *Acknowledge Document*: Select this option when a worker is required to acknowledge that he or she has read the document. When this is selected, the document will be available within the **Step 1 - Download Documents** section of the Documents page, but will also appear in the **Step 2 - Acknowledge / Upload Required Documents** section followed by an **Acknowledge** button that must be clicked prior to completing the activity guide process. • *Upload Document*: Select this option when a worker needs to provide information back to HR. When this is selected, the document will be available within the **Step 1 - Download Documents** section of the Documents page, but will also appear in the **Step 2 - Acknowledge / Upload Required Documents** section followed by an **Upload** button where the worker can add his or her file prior to completing the activity guide process.
Add Document	This button is available for new or documents where the file has been deleted. Click to upload the document that should be available in the system. The standard PeopleTools file attachment dialog box appears. After uploading a document, the page will display the file name, date the file was added, and the user ID of the person who added it. Use the Configure Documents - Templates Page to identify which templates should display this document.
View Document	Click this button to open and view the file you have previously entered.
Delete Document	Click this button to remove the file.

Related Links

Managing OffBoarding

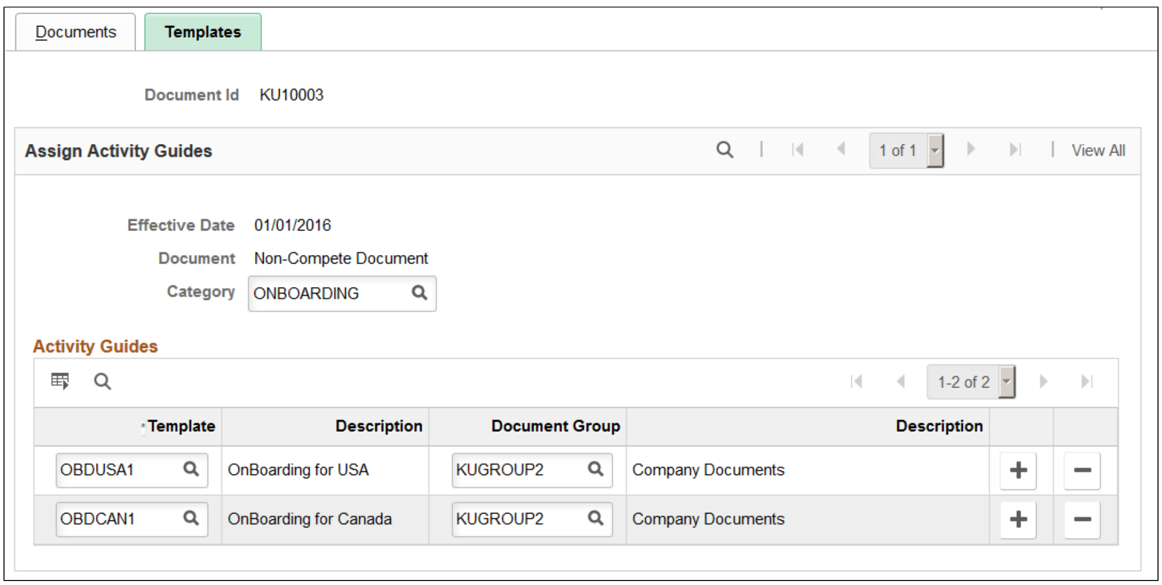
Configure Documents - Templates Page

Use the Configure Documents - Templates page (HR_OBD_CFG_DOC_TMP) to identify which templates should display this document.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, select OnBoarding or OffBoarding, then select the Configure Documents page item tab in the left panel, then select the Templates page tab.
- **Set Up HCM** > **Common Definitions** > **OnBoarding** > **Configure Documents** > **Templates**

This example illustrates the fields and controls on the Configure Documents - Templates page.



Field or Control	***Description***
Category	Indicate the Activity Guide Composer category to narrow the template search. Only those templates that use this category will be available when assigning templates on this page. This field is not required but if you do not select a category, all active templates, regardless of category, will be available for selection from the **Template** field.
Template	Enter the templates that should display this document on their Documents Page step.

Field or Control	*Description*
Document Group	(Optional) Identify a document group to link documents. Document groups are defined on the Document Groups Page. By associating documents with a group, you are able to group documents under different steps within the activity guide process. For more information on linking documents to different steps, see Understanding Document Groups at the beginning of this topic.

Related Links

Managing OffBoarding

Employee Documents Page

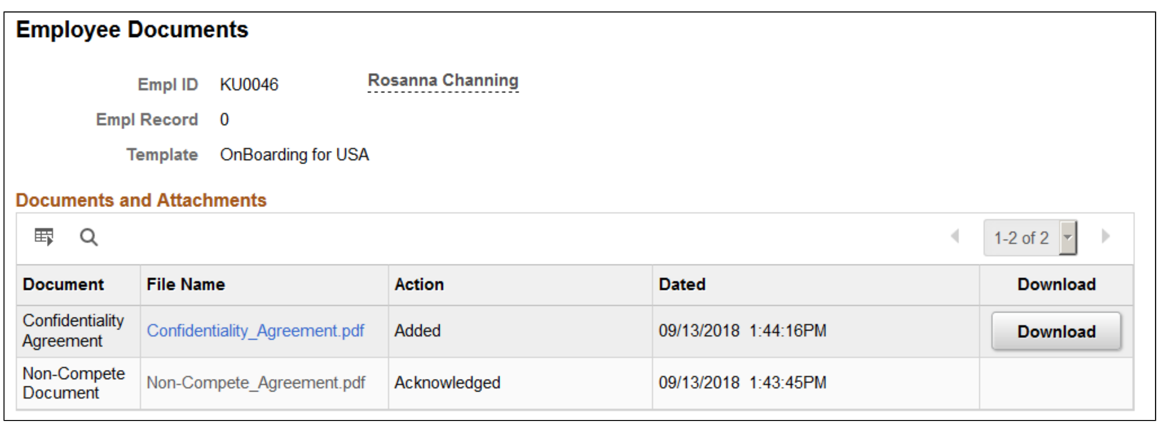
Use the Employee Documents page (HR_OBD_EMP_DOCS) to view the documents that workers have acknowledged or uploaded.

Note: This is only for Attachments and Documents steps within OnBoarding and OffBoarding activity guides and not for attachments uploaded in other steps.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then select OnBoarding or OffBoarding, then select the Employee Documents page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OnBoarding** > **Employee Documents** > **Employee Documents**

This example illustrates the fields and controls on the Employee Documents page.



Employee Documents

Empl ID KU0046 Rosanna Channing

Empl Record 0

Template OnBoarding for USA

Documents and Attachments

1-2 of 2

Document	File Name	Action	Dated	Download
Confidentiality Agreement	Confidentiality_Agreement.pdf	Added	09/13/2018 1:44:16PM	Download
Non-Compete Document	Non-Compete_Agreement.pdf	Acknowledged	09/13/2018 1:43:45PM	

Field or Control	*Description*
File Name	Displays as an active link when the person uploaded a document. Click the link to view the file.

Field or Control	*Description*
Action	View the action the employee took regarding this document. Options are *Added* or *Acknowledged*.
Download	Click this button to download and save the file.

Related Links

Documents Page
Attachments Page
Managing OffBoarding

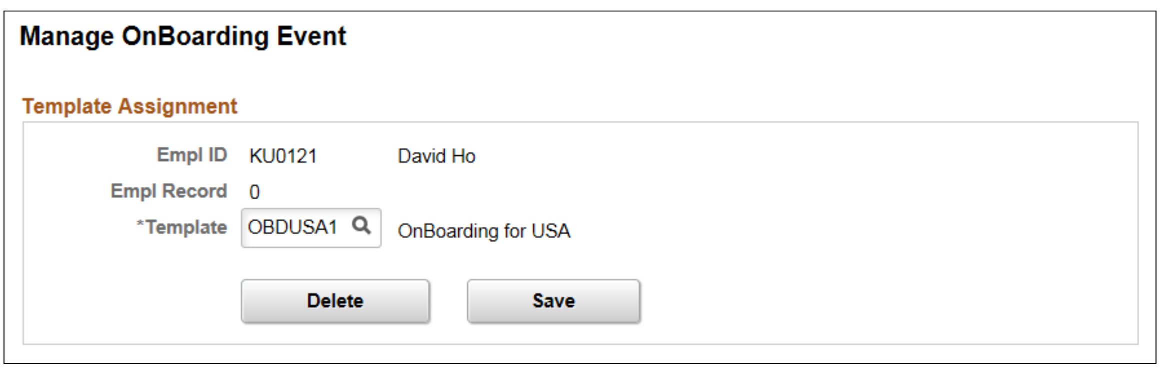
Manage OnBoarding Event Page

Use the Manage OnBoarding Event page (HR_OBD_EMP_TMPLS) to add a trigger for a person who is missing a job assignment trigger or correct an incorrect template assignment.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the HR Administration Tile, then OnBoarding, then select the Manage OnBoarding Event page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OnBoarding** > **Manage OnBoarding Event** > **Manage OnBoarding Event**

This example illustrates the fields and controls on the Manage OnBoarding Event page.



Note: This page enables HR administrators to access trigger rows, update the template ID, delete the trigger, or add a trigger, if necessary. An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed. For additional information on OnBoarding triggers, see the Understanding OnBoarding Triggers and Handlers topic.

Field or Control	*Description*
Template	The template value is provided by default from the Template Assignment configuration method selected on the OnBoarding Installation Page. These are: • *Use Template Assignment*: The template is derived and populated based on the option from the Template Assignment engine using the "AG Composer Tmplt Asgnmt - Template Assignment Page" (Enterprise Components). • *Use Default Template*: The value is derived from the **Template** field on the installation page. If necessary, enter or update the template. Select from a list of valid templates associated with the **Activity Guide Category** value defined on the OnBoarding Installation Page. Note that AGC template administrators will use the "Activity Guide Composer - General Information Page" (Enterprise Components) to associate categories to a template. **Note:** You can change the template without warning for a job assignment where the OnBoarding process has not started. However, if you change the template for a job assignment where an OnBoarding process is in progress, the system will issue a warning that an OnBoarding process already exists for this template and the process will be deleted.
Delete	This button is available only if a trigger entry already exists. Click this button to delete an existing trigger. • When the OnBoarding process has *not* been started by the worker, the system will issue a message asking if you want to delete the OnBoarding trigger for this job assignment. • For job assignments where OnBoarding is in progress and a process ID exists, the system will issue a warning message stating that an OnBoarding process already exists for this template and asks if you want to continue with trigger deletion. **Note:** The system will not prevent you from deleting an in progress trigger. If you delete it, the system will remove the trigger and OnBoarding process. Hence, the worker will no longer be able to access that OnBoarding process for the deleted job assignment row. The PeopleSoft application delivers a handler where once a job assignment is terminated, the Event Manager handler will delete the trigger for job assignment automatically.

Field or Control	*Description*
Save	Click this button to save the trigger changes. When a new trigger is created, the OnBoarding tile and pages will present the correct OnBoarding process to the employee. Note that the employee must be granted the *OnBoarding Employee* role to have access to the tile.

OnBoarding Status Page (for Administrators)

Use the OnBoarding Status page (HR_OBD_STATUS_FL) to view and take action on a worker's progress for an OnBoarding process as an administrator.

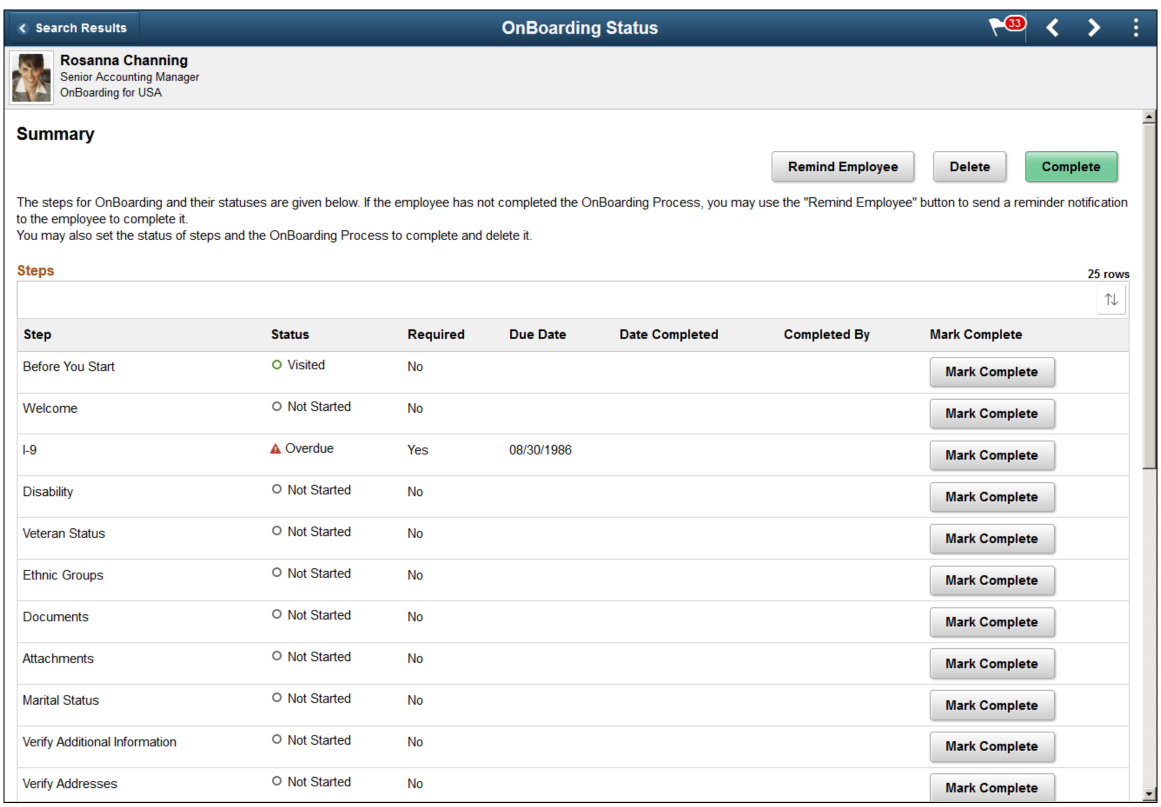
This video demonstrates the administrator view of OnBoarding statuses:

Video: Image Highlights, PeopleSoft HCM Update Image 28: Administrator View of OnBoarding

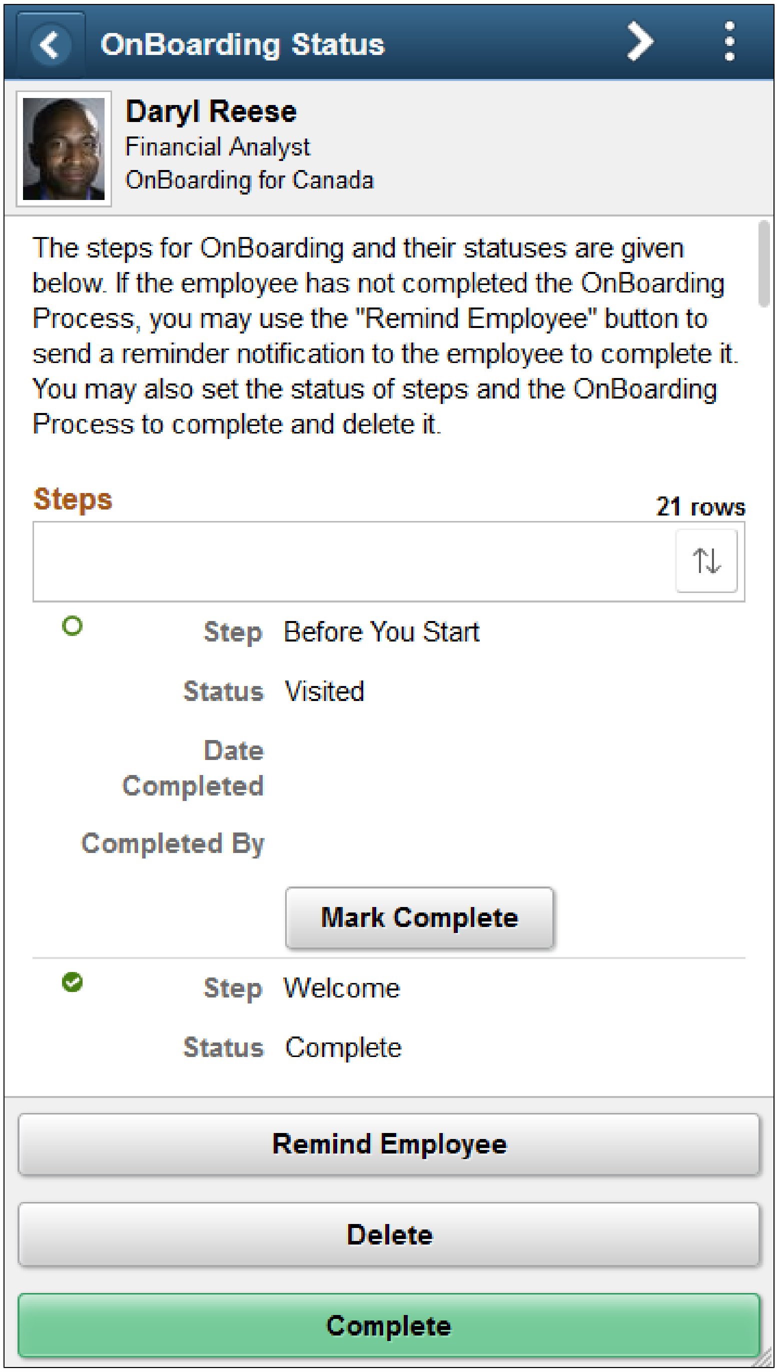
Navigation:

From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the HR Administration Tile, then OnBoarding, then select the OnBoarding Status page item tab from the left panel.

This example illustrates the fields and controls on the OnBoarding Status page for administrators when using a large form factor such as a tablet or workstation.



This example illustrates the fields and controls on the OnBoarding Status page for administrators when using a smartphone.



The header of the page displays the employee and OnBoarding template for the job he or she is starting.

Use this page to view a summary of the steps the employee has visited, completed, not started, or steps that may be overdue. Further action can be taken, based on the following information.

Summary

Buttons and the introductory text on this page will vary based on the configuration defined on the OnBoarding Installation Page, Administrator View section and the employee's OnBoarding process status.

OnBoarding process statuses include:

- *Complete*
- *In Progress*
- *Not Started*

Field or Control	***Description***
Remind Employee	This button is available for OnBoarding processes with a status of *In Progress* or *Not Started*. Click this button to send a notification to the employee to remind him or her to complete the OnBoarding process for this transaction. The notification reminder template sent to the employee is defined on the OnBoarding Installation Page.
Delete	This button is available for OnBoarding processes with a status of *Complete* or *In Progress* when the **Allow OnBoarding Processes to be deleted** option is selected on the OnBoarding Installation Page. Click this button to delete the OnBoarding process for this employee.
Complete	This button is available for OnBoarding processes with a status of *In Progress* when the **Allow OnBoarding Processes and Steps to be completed** option is selected on the OnBoarding Installation Page. Click this button to mark this OnBoarding process as complete.
Status	This field is available for OnBoarding processes with a status of *Complete* or *In Progress*. Displays the employee's status for a step after the employee has started the OnBoarding process.

Field or Control	*Description*
Required and **Due Date**	Displays these columns when a step is required or has a due date. These are defined on the “Configure Attributes Page” (Enterprise Components) of the activity guide template. Steps that are past the due date will display the Overdue icon in the **Status** column.
Mark Complete	This button appears for steps when the processes has a status of *In Progress* and the **Allow OnBoarding Processes and Steps to be completed** option is selected on the OnBoarding Installation Page. Click this button to mark an individual step as complete. When you or the employee has already marked a step complete, the button for that step is unavailable for selection and the **Date Completed** and **Completed By** fields display who marked the step as complete and when. **Note:** You cannot mark the OnBoarding process complete without completing all required steps first.

Managers use the OnBoarding Status Page (for Managers) to view the status of a worker’s OnBoarding process and send reminders. Unlike administrators, manager do not have the ability to mark individual steps as *Complete* or delete or complete an entire OnBoarding process.

Related Links

Viewing OnBoarding Activity Statuses as a Manager

Accessing the PeopleSoft OnBoarding Dashboard and Pages

The OnBoarding feature uses the PeopleSoft Fluid User Interface to provide employees and contingent workers who are newly starting or restarting with the organization with a comprehensive list of tasks that should be completed. With OnBoarding, employees have guided access to these tasks from one location instead of accessing several components separately.

The following videos provide a demonstration of the OnBoarding features:

Video: PeopleSoft Fluid OnBoarding

Video: Image Highlights, PeopleSoft HCM Update Image 33: Business Partner Viewable in PeopleSoft OnBoarding

These topics provides and overview of viewing the OnBoarding tile and discuss accessing the OnBoarding tiles and pages.

Note: The HCM application provides pages for managers [OnBoarding Activities Page (for Managers) and OnBoarding Status Page (for Managers)] and administrators [OnBoarding Status Page (for Administrators)] to view the status of employee OnBoarding processes.

Pages Used to Access the OnBoarding Pages

Page Name	***Definition Name***	***Usage***
OnBoarding Tile	HC_HR_OBD_DASHBOARD_LINK_FL (this is the cref for the tile)	Access the OnBoarding dashboard where employees and contingent workers complete actions or tasks that are required for a new job record. **Note:** This tile is available when a worker has been granted access to the *OnBoarding Employee* role. OnBoarding is not available for persons of interest (POIs).
OnBoarding Dashboard	HC_HR_OBD_DASHBOARD_FL (this is the cref for the dashboard)	Select from tiles related to OnBoarding activities required by a person, view Company Directory data, or enter time.
OnBoarding Activities Tile	HC_HR_OBD_ACTIVITY_LAUNCHER_FL (this is the cref for the tile)	Launch an activity guide that enables you to perform actions and task required for a new job.
Company Directory Tile	HC_HR_SRCH_CD_GBL (this is the cref for the tile)	Access the Company Directory pages.
Business Partners Tile	HC_HR_EE_BUS_PRTNR_FL_GBL (this is the cref for the tile)	Access your business partner information, if available.
"My Job Profiles Tile (for Employees)" (PeopleSoft eDevelopment)	HC_JPM_EMP_RELPROF_FL_GBL (this is the cref for this tile)	View your job profile attributes using fluid. When enabled, you may also be required to acknowledge that you have reviewed the requirements of your job.

Understanding How to View the OnBoarding Tile

Although the OnBoarding tile is delivered to appear on the Employee Self Service fluid home page, this tile is only available when a worker has been granted access to the *OnBoarding Employee* role.

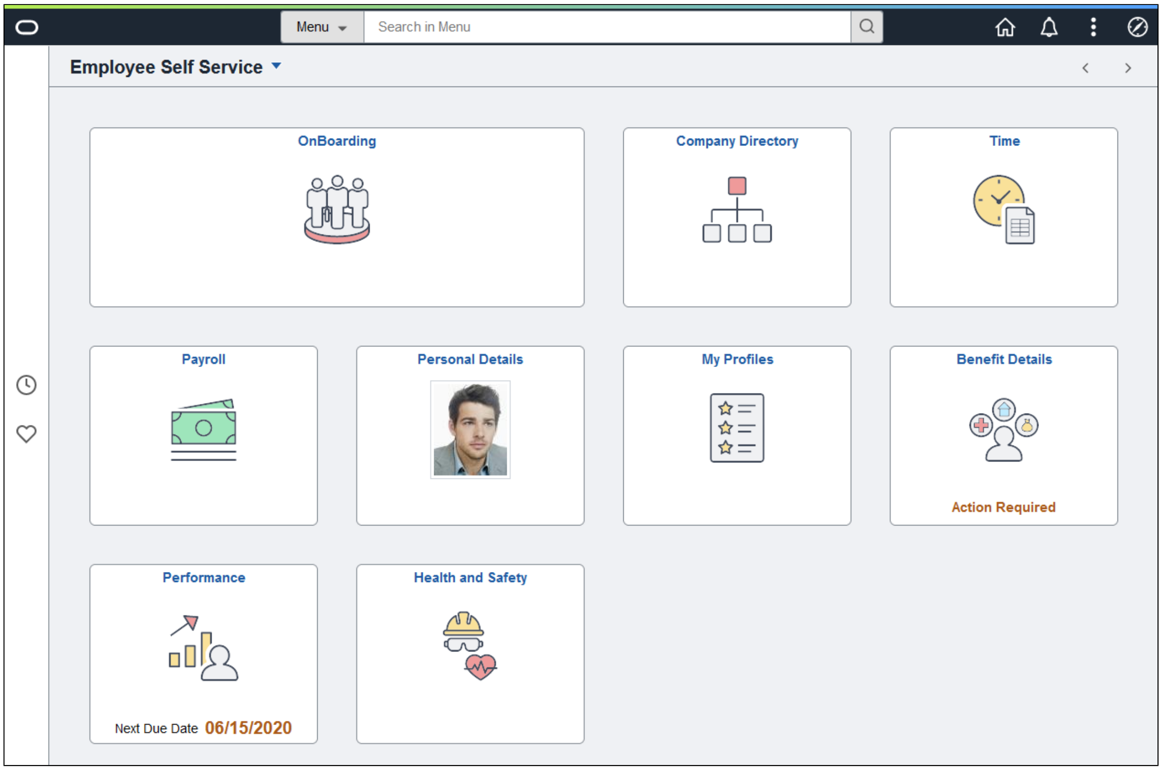
The OnBoarding feature comes with a workflow process that identifies the actions that trigger an OnBoarding business event. Events are triggered for the following Job Data actions:

- *Employee* event triggers are *Hire, Additional Assignment,* and *Rehire*.
- *Contingent Worker* event triggers are *Add Contingent Worker* and *Renewal.*

Note: OnBoarding is not available for persons of interest (POIs).

Administrators can maintain event triggers using the Manage OnBoarding Event Page

This example illustrates the OnBoarding tile on the Employee Self Service home page.



Related Links

Understanding OnBoarding Triggers and Handlers

OnBoarding Tile

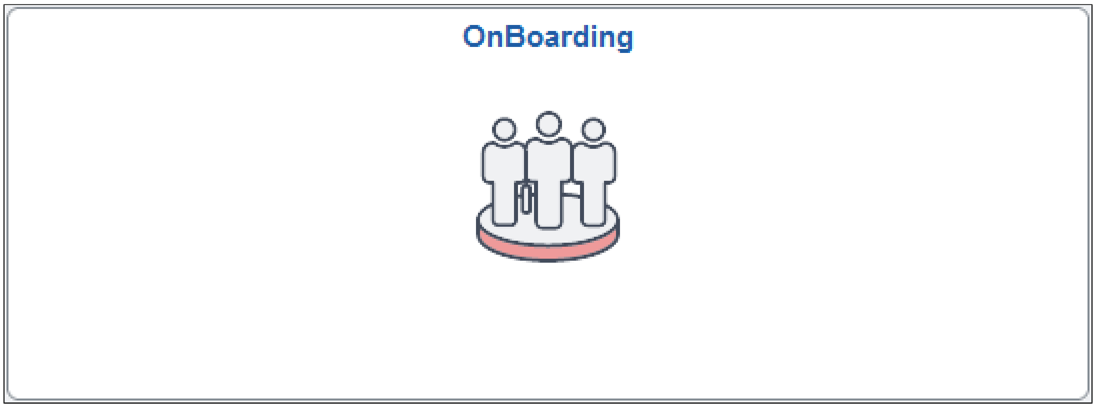
Use the OnBoarding tile to access the OnBoarding dashboard where employees and contingent workers complete actions or tasks that are required for a new job record.

Note: This tile is available when a worker has been granted access to the *OnBoarding Employee* role. OnBoarding is not available for persons of interest (POIs).

Navigation:

The OnBoarding tile is delivered as part of the fluid Employee Self Service home page but the location of the tile may vary if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the OnBoarding tile.



Click anywhere on this tile to access the OnBoarding Dashboard, which displays the OnBoarding Activities, Company Directory, Business Partner, and Time tiles.

Note: Once the activity guide has been marked as *Complete*, the OnBoarding dashboard tile will no longer be visible.

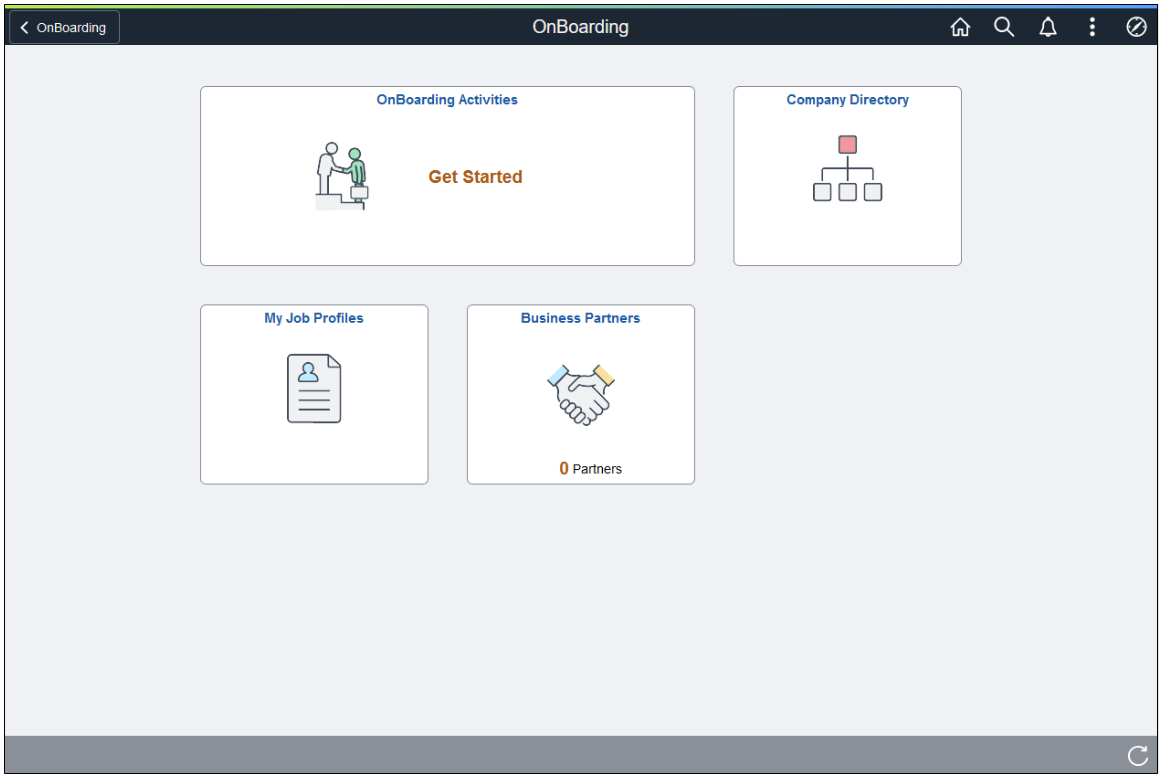
OnBoarding Dashboard

Use the OnBoarding dashboard to select from tiles and pages related to OnBoarding activities required by a person, view Company Directory data, view business partner information, if available, or enter time.

Navigation:

Click the OnBoarding Tile on the delivered Employee Self Service fluid home page (or any other home page with the tile).

This example illustrates the OnBoarding dashboard.



This example shows the delivered tiles for the OnBoarding dashboard. Organizations can add more tiles to this dashboard as needed.

The following table describes the tiles on the delivered OnBoarding dashboard. Use the links in the table to access complete documentation for each transaction.

Tile	***Purpose***
Business Partners Tile	Access your business partner information, if available. **Note:** This tile not visible by default, but you can add it to the dashboard through personalizations under the OnBoarding menu item.
Company Directory Tile	Access the Company Directory pages, where you can view employee personal and job data within the context of your organization's various hierarchical reporting structures.
OnBoarding Activities Tile	Launch an activity guide that enables you to perform actions and task required for a new job instance.
“My Job Profiles Tile (for Employees)” (PeopleSoft eDevelopment)	View your job profile attributes using fluid. When enabled, you may also be required to acknowledge that you have reviewed the requirements of your job.

Using OnBoarding Pages

The OnBoarding feature uses the PeopleSoft Fluid User Interface to provide employees and contingent workers with a comprehensive list of tasks that should be completed as part of their OnBoarding experience. OnBoarding takes advantage of existing pages in the system and gives employees and contingent workers access to these pages and tasks from one location instead of accessing several components separately.

The following video provides a demonstration of how to use OnBoarding:

Video: PeopleSoft Fluid OnBoarding

This topic discusses those pages specific to the OnBoarding process. Information regarding those pages specific to a product or business process are documented elsewhere and are accessible through the links provided here:

- Standard OnBoarding Steps: Completing the Standard OnBoarding Activity Guide
- Canadian OnBoarding Steps: (CAN) Completing OnBoarding Activity Guides for Canadian Workers
- U.S. OnBoarding Steps: (USA) Completing OnBoarding Activity Guides for US Workers

Pages Used for OnBoarding

Page Name	***Definition Name***	***Usage***
OnBoarding Activities Tile	HC_HR_OBD_ACTIVITY_ LAUNCHER_FL (this is the cref for the tile)	Launch an activity guide that enables you to perform actions and tasks required for a new job.
OnBoarding Activities Page (for Workers)	HR_OBD_ACTIVITY_FL	View your progress and launch the OnBoarding template. **Note:** The system displays this page if you are hired for multiple jobs and are assigned multiple OnBoarding templates.
The Activity Guide Composer Framework for OnBoarding (common elements on pages used to complete OnBoarding tasks)	N/A	The Activity Guide Composer frameworks lets you define OnBoarding templates that can be instantiated to execute steps pointing to OnBoarding specific tasks. Activity guides display application steps in either the left panel or across the top of the page as part of the guided process. A corresponding page to the current step you have selected appears in the main panel. They also provide navigation buttons in the page banner for navigating through the steps.

Page Name	***Definition Name***	***Usage***
Before You Start Page	AGC_VIDEO_FL	Learn how to navigate the OnBoarding activity guide.
Welcome Page	AGC_VIDEO_FL	Watch a video or read a transcript welcoming you to the organization.
Documents Page	HR_OBD_ATT_DNLD_FL	View, acknowledge, or upload documents provided by the organization.
Attachments Page	HR_OBD_ATT_UPLD_FL	Upload copies of additional documents, such as certificates or identification information.
Personal Details - Photo Page	HR_OBD_PHOTO_FL	Upload a photo of yourself to be stored in the HR system and enter any preferred names for yourself.
Summary Page	AGC_SUMMARY_FL	View a summary of your OnBoarding activities, mark individual steps a complete, return to a specific step, or mark this OnBoarding process as complete.

OnBoarding Activities Tile

Use the OnBoarding Activities tile to launch an activity guide that enables you to perform actions and tasks required for a new job.

Navigation:

Click the OnBoarding Tile from the Employee Self Service fluid home page (or any other home page with the tile).

This example illustrates the OnBoarding Activities tile when a user first accesses the activity guide.

This example illustrates how the OnBoarding Activities tile may appear after a user has previously accessed the activity guide.

If you have not yet accessed the OnBoarding activity guide, the tile will display the text *Get Started*.

When you have already started the activity guide process, the tile shows the total number steps remaining. If a step has passed it's due date, the tile will also display a warning message and number count of how many steps have exceeded the due date.

When the OnBoarding template has been marked complete, you will see the message *Completed* and you will no longer be able to access the activity guide.

Click the tile to access the OnBoarding activity guide to begin or continue completing the OnBoarding steps.

OnBoarding Activities Page (for Workers)

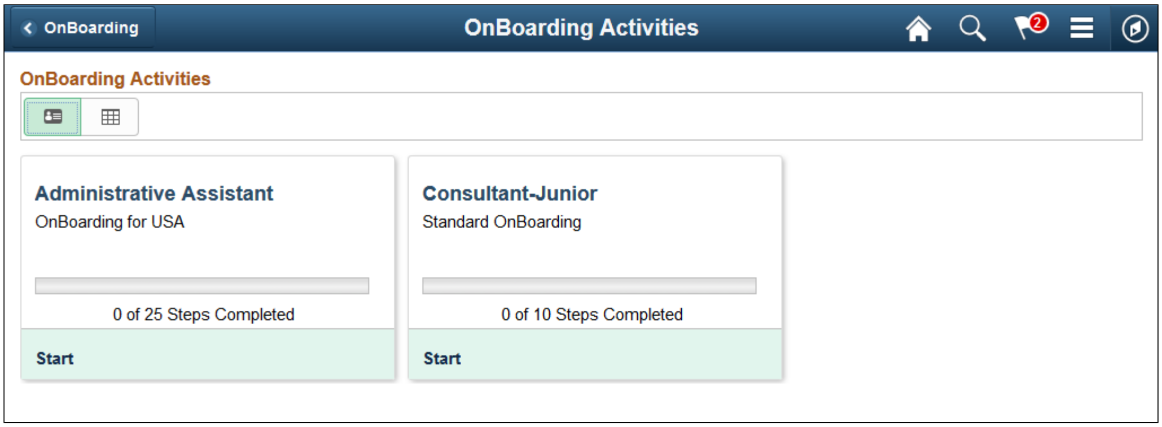
Use the OnBoarding Activities page (HR_OBD_ACTIVITY_FL) to view your progress and launch the OnBoarding template.

Note: The system displays this page if you are hired for multiple jobs and are assigned multiple OnBoarding templates.

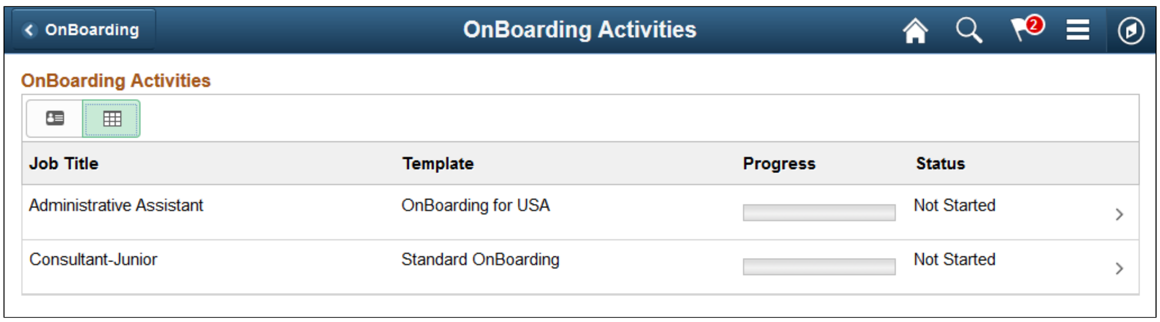
Navigation:

Click the OnBoarding Activities Tile when you have been assigned multiple jobs.

This example illustrates the card view on the OnBoarding Activities page.

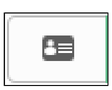
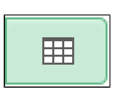


This example illustrates the grid view on the OnBoarding Activities page.



Employees and contingent workers with multiple jobs begin the OnBoarding event process by navigating to the OnBoarding Activities Page (for Workers) and then selecting the appropriate job transaction. The OnBoarding Activities page is displayed only if the employee has multiple jobs and needs to execute multiple OnBoarding templates. If the employee has only one job (or uses the same OnBoarding template for the multiple jobs) the OnBoarding Activities tile on the dashboard will directly launch the activity guide.

The page displays job title that initiated the trigger for the OnBoarding process. You will also see the OnBoarding template name you will be completing along with your progress and status in the process.

Field or Control	***Description***
 (Card View)	Click the Card View icon button to display information in a card or tile-like format. The card view is the default mode.
 (Grid View)	Click the Grid View icon button to display the template process in a grid format. The grid shows the same information as the card.

Click a card or row to access the Activity Guide for this OnBoarding template.

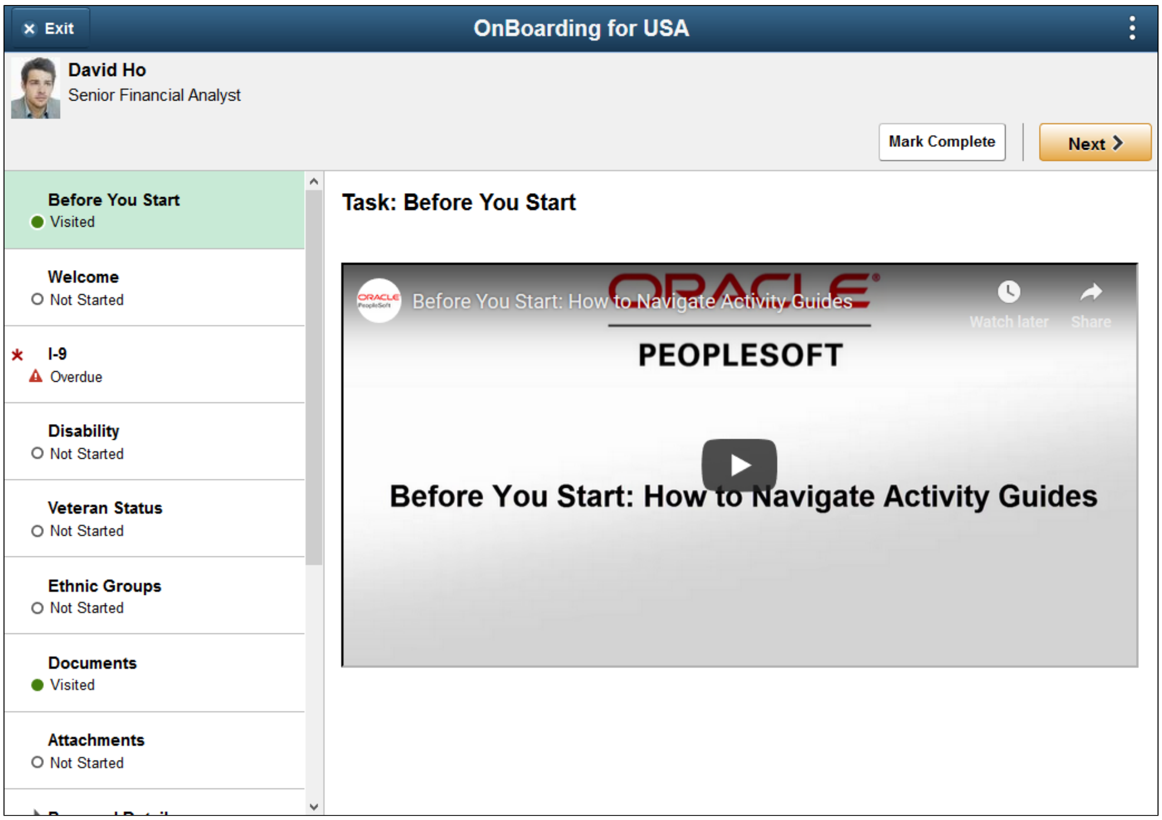
The Activity Guide Composer Framework for OnBoarding

The Activity Guide Composer frameworks lets you define OnBoarding templates that can be instantiated to execute steps pointing to OnBoarding specific tasks.

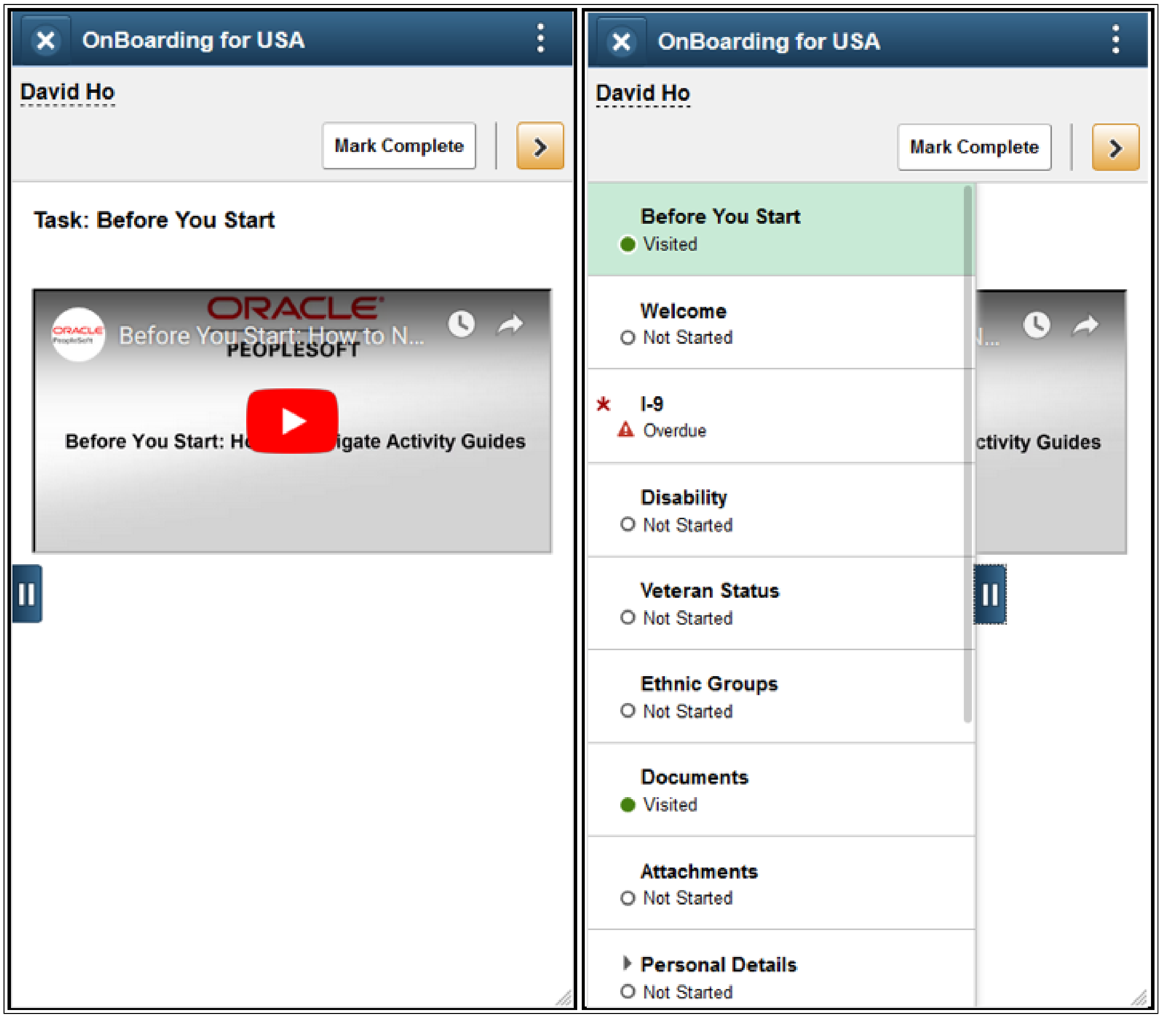
Activity guides display application steps in either the left panel or across the top of the page as part of the guided process. A corresponding page to the current step you have selected appears in the main panel. They also provide navigation buttons in the page banner for navigating through the steps.

To set up templates using the Activity Guide Composer, see the "Understanding the Activity Guide Composer" (Enterprise Components) documentation.

This example illustrates the layout for the OnBoarding pages for a large form factor device.



This example illustrates the layout of the OnBoarding pages on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Note: During runtime, PeopleTools manages the execution of the activity guide. Throughout this topic, the page illustrations show the page sections of the OnBoarding process without the context of the activity guide steps. Even though the framework is not illustrated, remember that all steps appear within that framework.

Page Banner

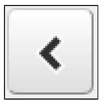
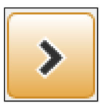
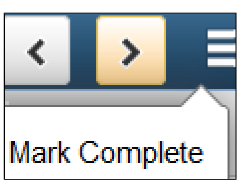
The top of PeopleSoft pages is called the page banner.

On most pages, users see the standard set of banner icon buttons.

Field or Control	***Description***
 or  Exit button	Click this button to exit the OnBoarding activity guide. If you have not clicked the **Complete** button on the Summary page before exiting, you can resume this OnBoarding data entry at a later time.

Header (Sub-Banner)

A gray area under the main page banner displays contextual information that is specific to the activity guide, including the person's name and action buttons.

Field or Control	*Description*
 or  Previous button	Click this button to navigate to the previous step or substep. When configured to use the Auto Save feature, clicking this button will save changes to the current step before moving to the next. If it is not configured to use auto save, then the system will issue a message prompting the user to save the page first. The button is not visible on the first step in the request.
 or  Next button	Click this button to navigate to the next step or substep. When configured to use the Auto Save feature, clicking this button will save changes to the current step before moving to the next. If it is not configured to auto save, then the system will issue a message prompting the user to save the page first. On the last step of the request (the Summary step), the **Next** button does not appear. The page displays a **Complete** button on the Summary page to complete the OnBoarding transaction.
 Complete button	This button appears on the Summary step page only. Click this button to mark the OnBoarding activity guide complete. **Note:** Once the activity guide has been marked as *Complete*, the OnBoarding dashboard tile will no longer be visible.
 **Mark Complete** menu item from the Actions Menu list (Prior PeopleTools 8.57) or  **Mark Complete** button (PeopleTools 8.57 or higher)	Select the **Mark Complete** menu item (prior to PeopleTools 8.57) or button in the sub banner (PeopleTools 8.57 or higher) to change the status of a step. See the Step List Format section that follows for more information on step statuses.

Step List Format

Depending on the setup of the template, the Activity Guide Composer framework can list steps in the following formats:

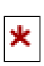
- *Vertical Non Sequential*: This activity guide will display unnumbered steps vertically in the left panel of the page.
- *Vertical Sequential*: This activity guide will display numbered steps vertically in the left panel of the page.
- *Horizontal Sequential*: This activity guide will display the steps horizontally across the top of the page.

The delivered OnBoarding templates are set up using the *Vertical Non Sequential* activity guide type. Therefore, this topic will discuss the layout of the delivered templates. The PeopleSoft application delivers the following OnBoarding templates:

- (USA) *OBDUSA1 – OnBoarding for USA*
- (CAN) *OBDCAN1 – OnBoarding for CAN*
- *OBDSTND – Standard OnBoarding*

Your organization may define templates that require the user to follow a prescribed order or use a horizontal display. In these cases, the steps are numbered and labeled. To define sequential steps for a vertical or horizontal display, see the "Activity Guide Composer - Activity Guide Type Page" (Enterprise Components) documentation.

The delivered activity guide type templates include a left panel that lists the steps in the OnBoarding process. This panel appears on the left of larger devices. On a small form factor such as phone, the panel is initially hidden. Click the Item/Sub-Item Section tab to expand and view the steps and navigate to other step pages.

Field or Control	***Description***
<Step or Substep Name>	The left panel has individual steps that are labeled. The delivered OnBoarding templates do not require a sequential order to completing steps. Some steps will have substeps. Steps with substeps are indicated by an expand/collapse icon before to the step name. The step is automatically expanded when you reach it. You can also click the parent step at any time to expand or collapse it. The page will highlight the current step or substep. **Note:** For a list of delivered OnBoarding steps for Canadian or US users, see (CAN) Completing OnBoarding Activity Guides for Canadian Workers and (USA) Completing OnBoarding Activity Guides for US Workers topics.
 Required icon	This icon appears before a step label and represents that the step is required. You cannot complete an OnBoarding transaction until all required steps are completed.

Field or Control	***Description***
<Step Status>	Each step and substep has a status. These statuses include: • *Not Started*: These are unvisited steps. • *Visited*: When you first reach a step, the status changes to this. • *Complete*: To mark a step complete, click the Actions Menu icon in the banner and select the *Mark Complete* action item (prior to PeopleTools 8.57) or click the **Mark Complete** button in the sub banner (PeopleTools 8.57 or higher). Or, access the Summary Page and click a **Mark Complete** button for a step. In some processes, the system will automatically mark the step as *Complete* where the system can correctly infer that the task for the step is done. If it is uncertain if a step is complete, the system will mark it as *Visited*. • *In Progress*: This status appears for required steps that you have visited, but you have not entered the required data and saved. • *Overdue*: Indicates that you have passed the due date for entering information into this step. Depending upon the configuration of the step, the step may remain open or be closed for entry after this date. Users can return to steps and substeps by clicking the step, using the navigation buttons in the banner, or from the Summary Page and clicking the **Go to Step** button.

For more information on how to display steps and selecting and organizing steps, see the “Activity Guide Composer - Activity Guide Type Page” (Enterprise Components), “Activity Guide Composer - Select Steps Page” (Enterprise Components), and “Activity Guide Composer - Organize and Configure Steps Page” (Enterprise Components).

<Transaction Name> Pages

During activity guide execution, the right or main panel displays the page for the current step in the transaction.

Field or Control	***Description***
<Title Text>	Displays a page title that includes the step name. For substeps, the page title includes both the step and substep name, separated by a hyphen. For example, *Payroll - Tax Withholding* indicates that the step title is *Payroll* and the substep title is *Tax Withholding*.

Before You Start Page

Use the Before You Start page (AGC_VIDEO_FL) to learn how to navigate the OnBoarding activity guide.

Navigation:

- Click the OnBoarding Activities Tile from the dashboard or select the respective card on the OnBoarding Activities Page (for Workers).
- Click the Before You Start step from the activity guide navigation, or use the **Previous** button, as needed.

This example illustrates the Before You Start page.

Use this page to watch a video of how to navigate activity guides.

Welcome Page

Use the Welcome page (AGC_VIDEO_FL) to watch a video or read a transcript welcoming you to the organization.

Navigation:

Select the Welcome step from the activity guide navigation, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Welcome page.

This page may contain custom information about your organization.

Play a video welcoming you to the organization, or click the **View Video Transcript** button to read the printed text from the video.

Documents Page

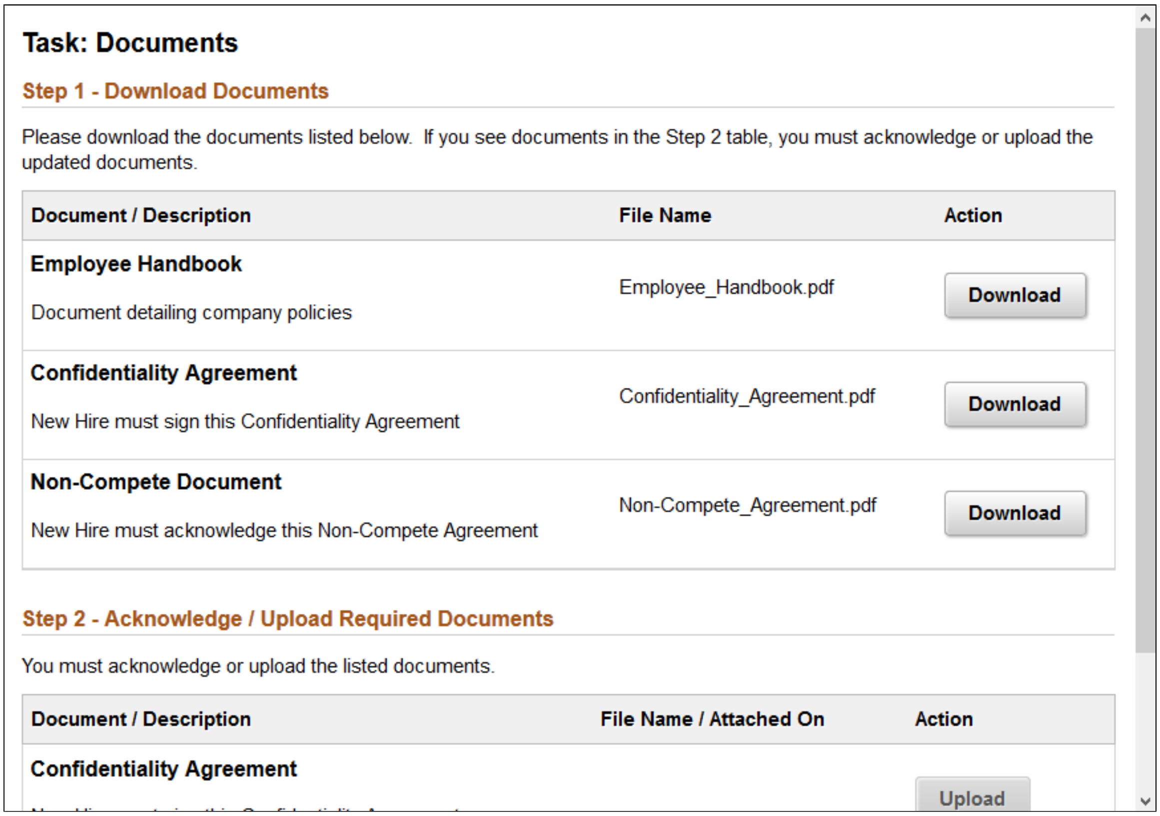
Use the Documents page (HR_OBD_ATT_DNLD_FL) to view, acknowledge, or upload documents provided by the organization.

Note: You can configure your activity guides to use document groups and filter your documents by categories. This enables you to display like documents in different steps. For more information on this, see Understanding Document Groups.

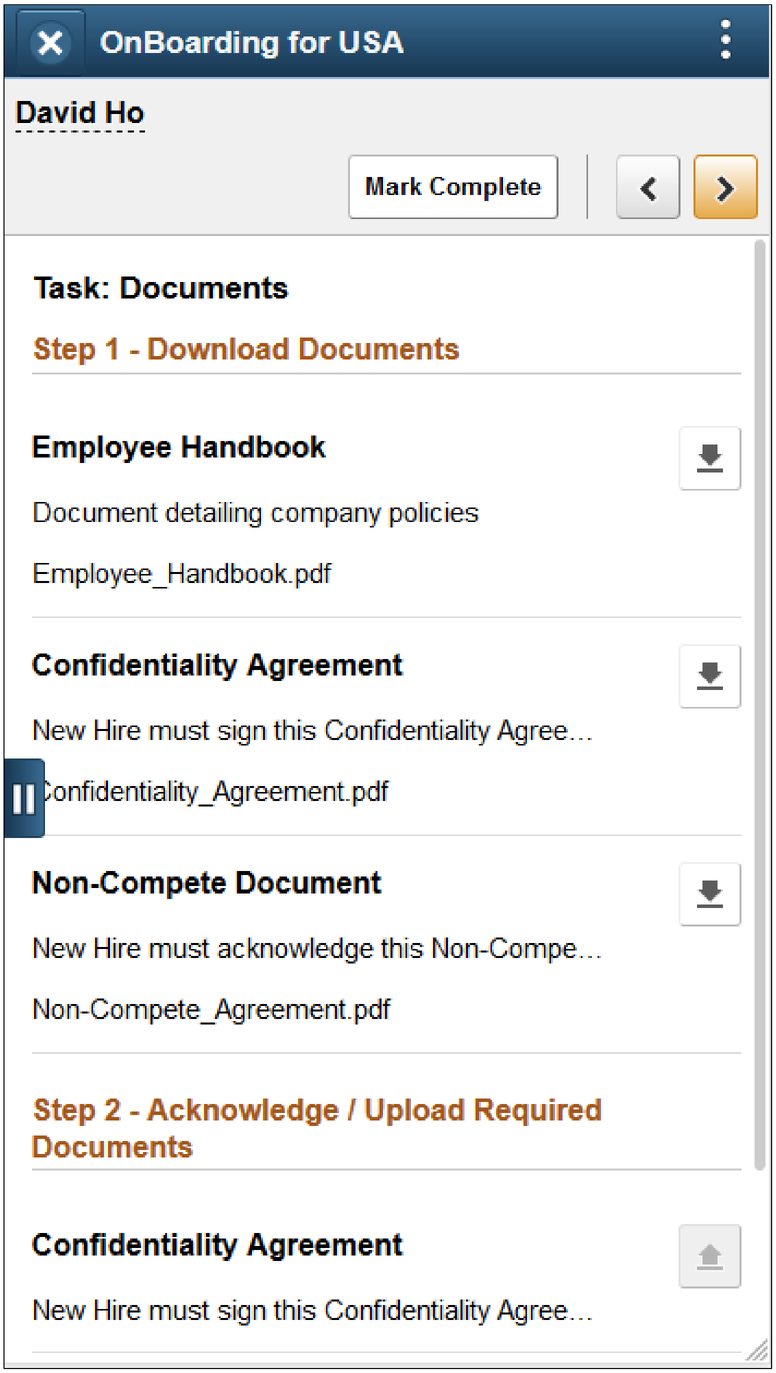
Navigation:

Select the Documents step from the activity guide navigation, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Documents page for a tablet.



This example illustrates the Documents page for a smartphone.



Use this page to view the documents for this OnBoarding process. Available documents are defined on the Configure Documents - Templates Page. Administrators define documents using one of these three options:

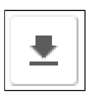
Administrators will access the uploaded files on the Employee Documents Page.

- *None*: These documents are available within the **Step 1 - Download Documents** section of this page. No further action is required from the worker other than to view or download the document.

- *Acknowledge Document*: These documents are available within the **Step 1 - Download Documents** section of this page as well as the **Step 2 - Acknowledge / Upload Required Documents** section, where it is followed by an **Acknowledge** button. You must acknowledge these documents prior to completing the OnBoarding process.
- *Upload Document*: These documents are available within the **Step 1 - Download Documents** section of the Documents page, as well as the **Step 2 - Acknowledge / Upload Required Documents** section, where it is followed by an **Upload** button. These documents require you to upload a document, which will be available to the OnBoarding administrator.

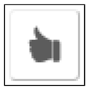
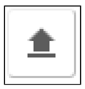
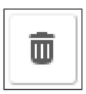
Step 1 - Download Documents

This section displays all documents provided for this template. When a document requires the worker to acknowledge that he or she has read the document, a corresponding row will appear in the **Step 2 - Acknowledge / Upload Required Documents** section displaying an **Acknowledge** button. When a document requires the worker to upload an updated version, such as the signed form, a corresponding row will appear in the **Step 2 - Acknowledge / Upload Required Documents** section displaying an **Upload** button. Not all documents will require an action.

Field or Control	***Description***
Document / **Description** and **File Name**	Displays the name of the file in bold and a short description. The file name that will download to your machine appears in the **File Name** field.
Download or 	Click this button to view and download the document attachment and, when an action is required for a document, enable the **Upload** or **Acknowledge** button for the corresponding document row in the **Step 2 - Acknowledge / Upload Required Documents** section. When you have downloaded a document, a check mark will appear for that row to indicate that you have downloaded the attachment. The system will also issue a message letting you know what actions you need to take in the **Step 2 - Acknowledge / Upload Required Documents** section.

Step 2 - Acknowledge / Upload Required Documents

This section displays all documents for this template that require an action. Not all documents in the **Step 1 - Download Documents** section will require an action and will therefore not have corresponding rows in this section.

Field or Control	***Description***
Acknowledge or 	This button is available when you have clicked the Download button from the corresponding document in the **Step 1 - Download Documents** section. Click this button to acknowledge that you have received and read the corresponding document available in the **Step 1 - Download Documents** section of this page.
Upload or 	This button is available when you have clicked the Download button from the corresponding document in the **Step 1 - Download Documents** section. Click this button to open the File Attachment page and upload the file. After you have selected and uploaded the file, click **Done** to return to this page. The uploaded file will appear as an active link in the **File Name / Attached On** row accompanied by the date and time the file was uploaded.
Delete or 	This button is available after you have uploaded a file. Click to remove the uploaded file. Once all required actions have been completed by the employee and the step is marked complete, the **Delete** button will be disabled.

Related Links

Employee Documents Page
Configure Documents - Documents Page

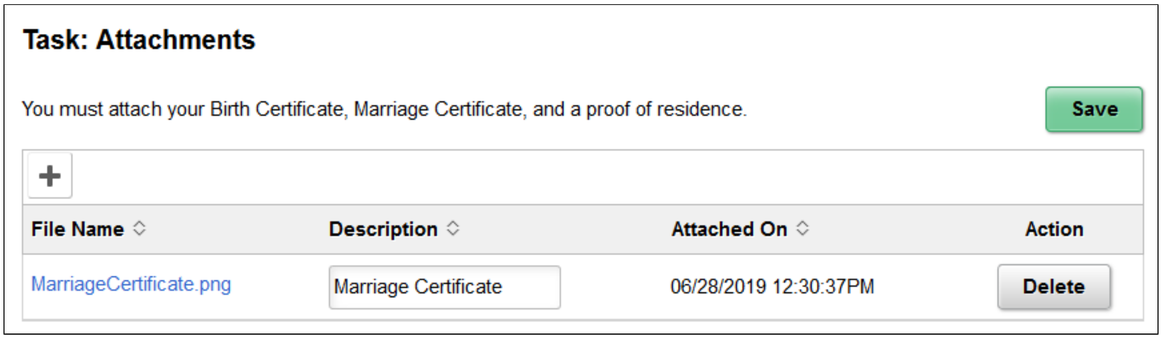
Attachments Page

Use the Attachments page (HR_OBD_ATT_UPLD_FL) to upload copies of additional documents, such as certificates or identification information.

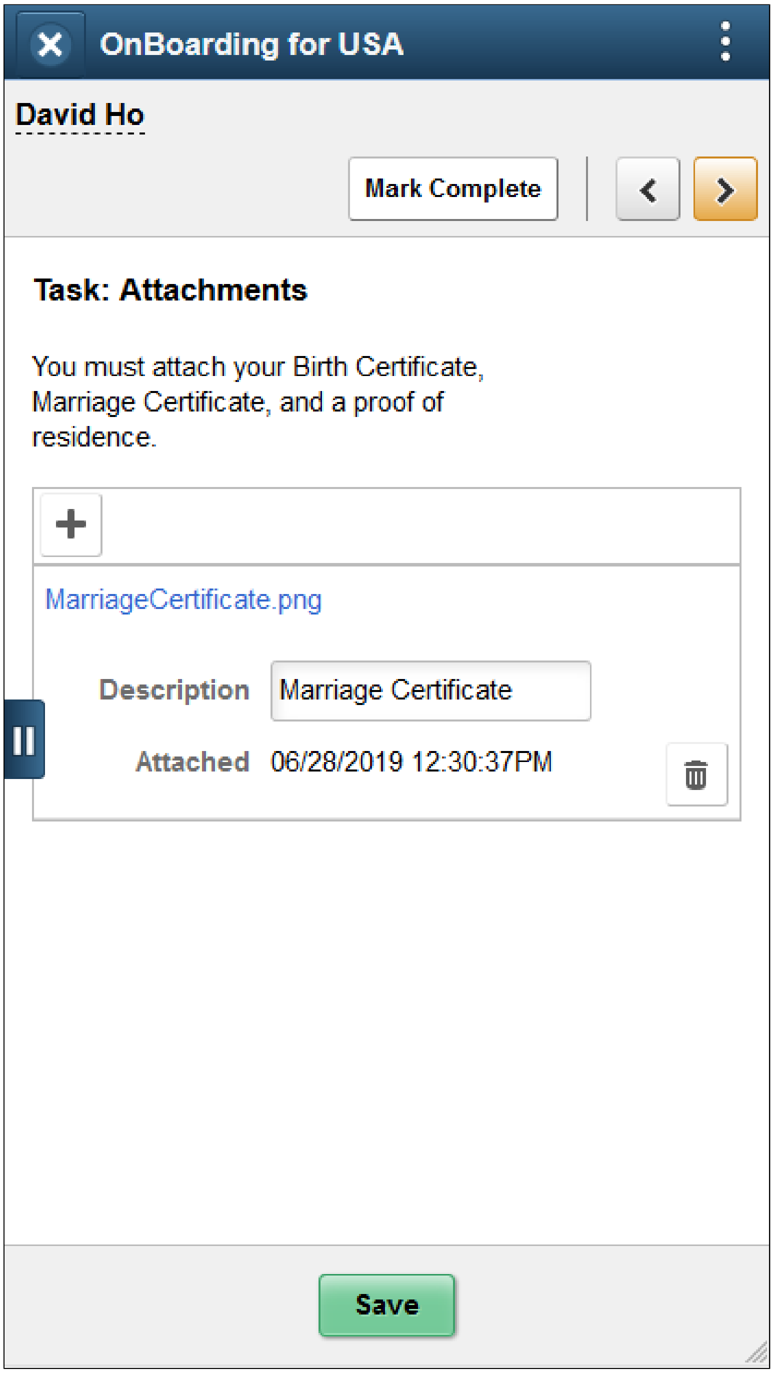
Navigation:

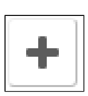
Select the Attachments step from the activity guide navigation, or use the **Next** and **Previous** buttons to navigate to the page.

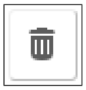
This example illustrates the Attachments page for the tablet.



This example illustrates the Attachments page for the smartphone.



Field or Control	*Description*
Add Attachment or  Add button	Click this button to open the File Attachment page and upload a file. After you have selected and uploaded the file, click **Done** to return to this page. The uploaded file will appear as an active link in the **File Name** field. The page will display the date and time the file was uploaded. When you add a file, the data is automatically saved for this page.

Field or Control	***Description***
Description	Enter up to 50 characters as a description for the file. You will need to select the **Save** button to save this data.
Delete or 	Click this button to remove the file from the page. The system will ask for confirmation that you want to delete this file. Click **Yes** to delete the file. This will automatically save the page with your deletion of the file.
Save	Click this button to save the description you have added or for the file. Administrators will access the uploaded files on the Employee Documents Page.

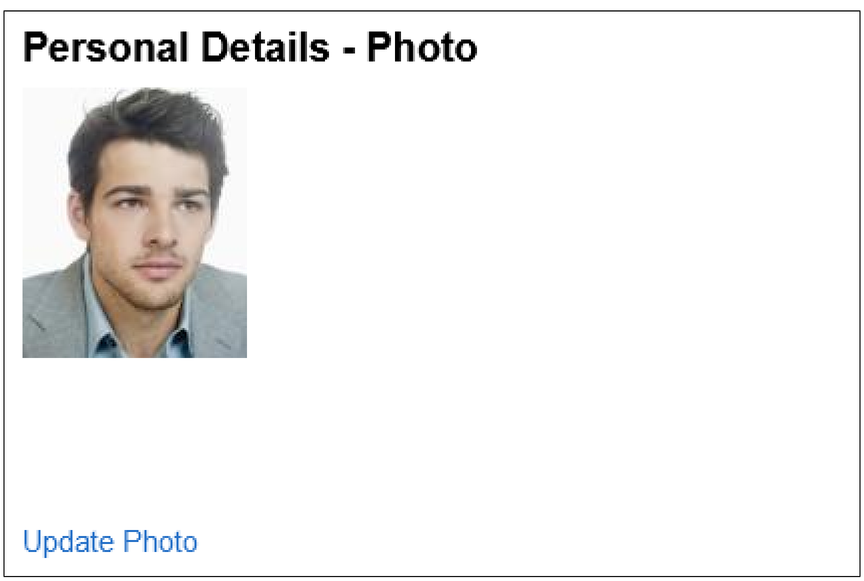
Personal Details - Photo Page

Use the Personal Details - Photo page (HR_OBD_PHOTO_FL) to upload a photo of yourself to be stored in the HR system and enter any preferred names for yourself.

Navigation:

Select the Personal Details step, then the Photo substep from the activity guide navigation, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Personal Details - Photo page.



Photo

Field or Control	*Description*
Update Photo	**Note:** The **Update Photo** link is available only when the **Allow Employee to Upload Photo** option is enabled on the Installation Table - "HCM Options Page" (Application Fundamentals). Select this link to upload or select an image of yourself. If there is no HR photo and you have not uploaded your own image, then the dummy photo will be displayed. The photo will be displayed in self service transactions.

Summary Page

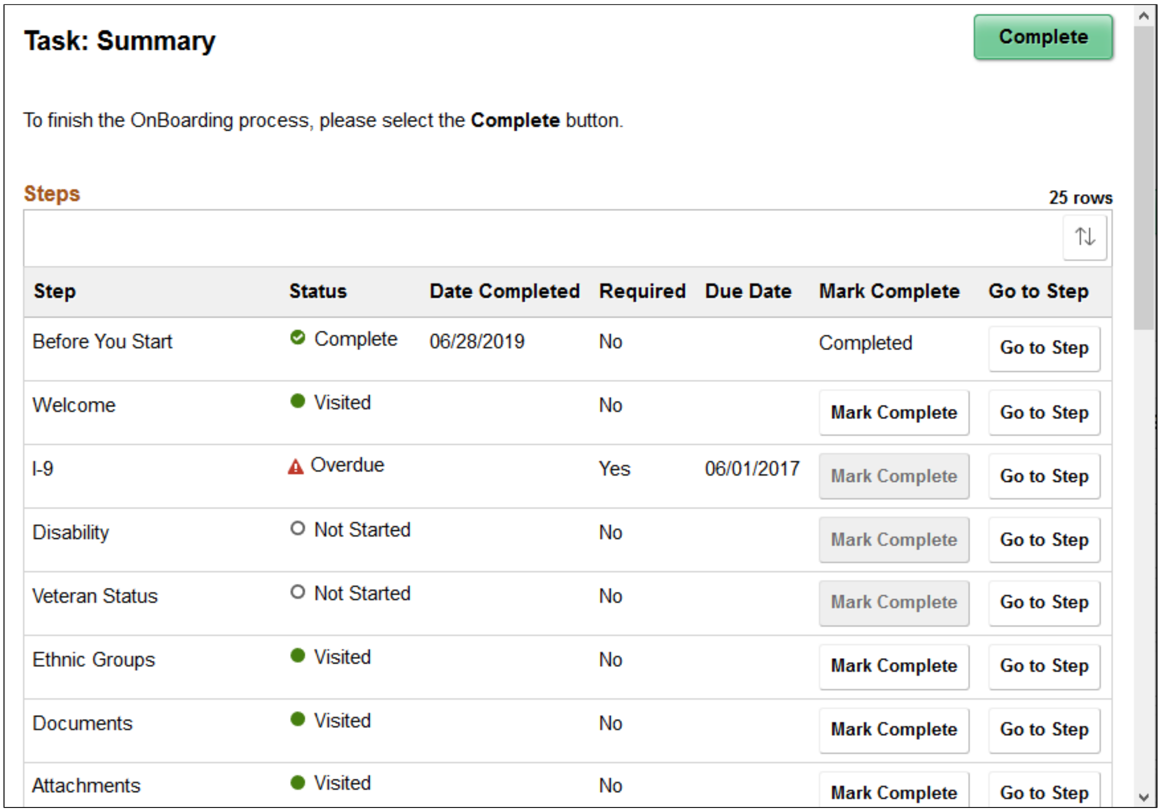
Use the Summary page (AGC_SUMMARY_FL) to view a summary of your OnBoarding activities, mark individual steps a complete, return to a specific step, or mark this OnBoarding process as complete.

Note: Oracle recommends that you add the Summary step as the last step in the activity guide process.

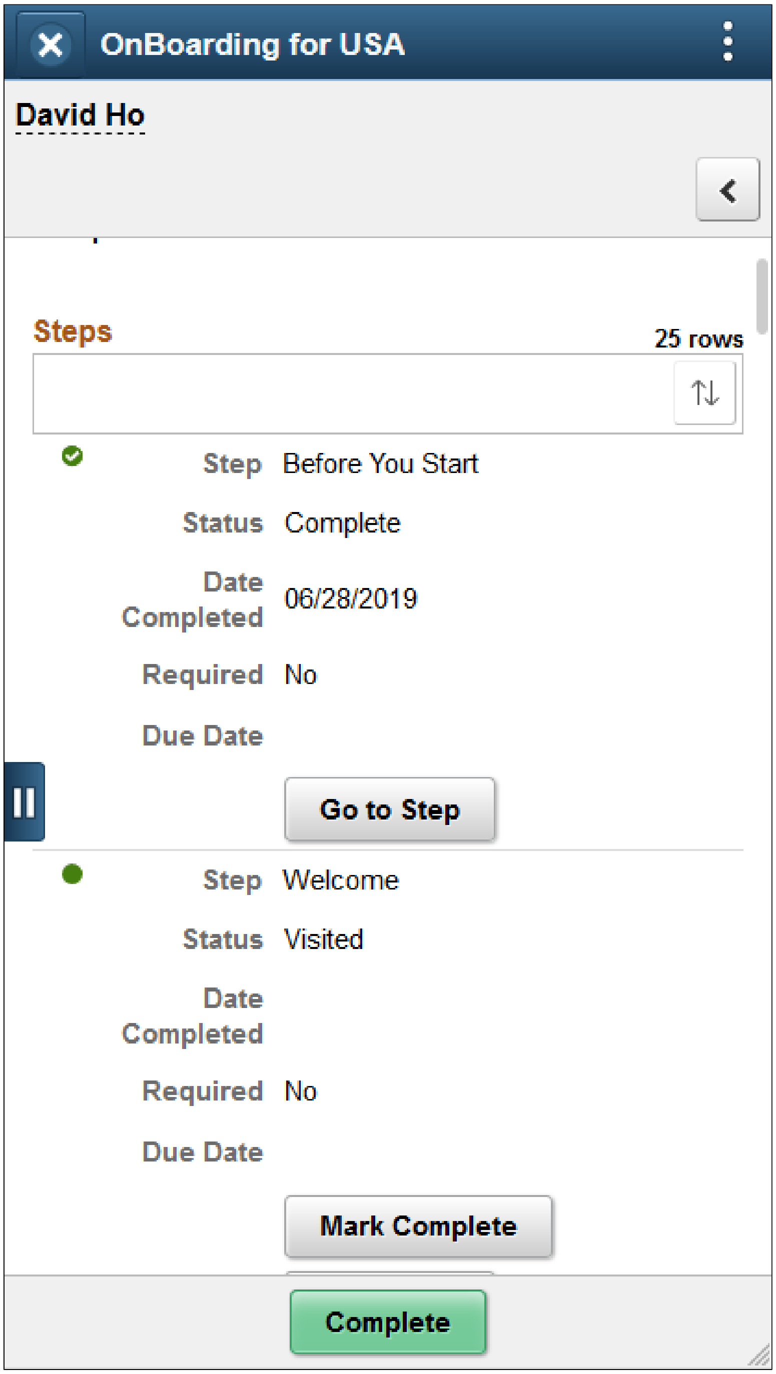
Navigation:

Select the Summary step from the activity guide navigation, or use the **Next** button to navigate to the page.

This example illustrates the Summary page for the tablet.



This example illustrates the Summary page for the smartphone.



View a summary of the steps you have visited and completed. Additionally, view custom information about any additional tasks that you need to do related to this OnBoarding event.

Use the Steps section to view a summary of the statuses of each step in this process and what is required and when.

Field or Control	*Description*
Status	Displays the status of the step.
Complete Date	Displays the date you completed this step. If you have not completed any steps, this field will be hidden. To mark a step *Complete*, click the Actions Menu icon in the banner and select the *Mark Complete* action item. Or, click a **Mark Complete** button for a step on this Summary page. In some instances, the system will automatically mark the step as *Complete* where the system can correctly infer that the task for the step is done.
Required	If a step is required, this field will display *Yes*.
Due Date	Displays the due date by when you should complete this step. If none of your steps has a due date, then this field will be hidden.
Mark Complete	This field will display one of the following options: • *Not Applicable:* This text will appear for a step that is not configured to be marked complete. • *Mark Complete* button *disabled*: This button will not be available for steps you have not visited or for steps that are dependent upon completing another step. • *Mark Complete* button *available*: Click this button to mark a step as *Complete*. After you select this button, the button will no longer appear the will be replaced by the text *Completed*. • *Completed:* This text appears for steps that you have already marked as *Complete*.
Go to Step	Click this button to easily navigate back to a step. If you have completed a step, this button is not available.
Complete	Click this button to mark this OnBoarding activity guide complete. The system will verify that all the required steps have been completed and displays a message if any are incomplete. This closes the OnBoarding activity guide transaction process. **Note:** Once the activity guide has been marked as *Complete*, the OnBoarding dashboard tile will no longer be visible.

Related Links

"Understanding the Activity Guide Composer" (Enterprise Components)

Completing the Standard OnBoarding Activity Guide

Employees and contingent workers begin the OnBoarding event process by navigating to the OnBoarding activity guide.

After the worker accesses the OnBoarding activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the worker through the OnBoarding process. These steps are specific to U.S. workers and are defined in the delivered *OBDUSA1* OnBoarding template.

This topic lists the pages that come with the delivered *Standard OnBoarding* (OBDSTND) template.

Pages Used to Complete the Standard OnBoarding Activity Guides

The following table describes the activity steps that are delivered with the *Standard OnBoarding* template. Use the links in the table to access documentation for each transaction.

Page Name	***Definition Name***	***Usage***
Before You Start Page	AGC_VIDEO_FL	Learn how to navigation the OnBoarding activity guide.
Welcome Page	AGC_VIDEO_FL	Watch a video or read a transcript welcoming you to the organization prior to initiating your OnBoarding event. This page may contain custom information about your organization.
Attachments Page	HR_OBD_ATT_UPLD_FL	Upload copies of additional documents, such as certificates or identification information.
Personal Details — Verify Name Page (see “Name (Summary) Page” (PeopleSoft eProfile))	HR_EE_NAME_FL	Verify your current name and enter a name change request, if needed.
Personal Details - Photo Page	HR_OBD_PHOTO_FL	Upload a photo of yourself to be stored in the HR system and enter any preferred names for yourself.
Personal Details - Verify Addresses Page (see “Addresses (Summary) Page” (PeopleSoft eProfile))	HR_EE_ADDR_FL	Verify your home and mailing address and make updates, as needed.
Personal Details - Verify “Contact Details Page” (PeopleSoft eProfile))	HR_EE_CONTACTS_FL	Review or enter your phone numbers, email addresses, and instant messaging IDs

Page Name	Definition Name	Usage
Personal Details - Marital Status Page (see “Marital Status or Divorce Status Page” (PeopleSoft eBenefits))	HR_EE_MARITAL_FL	Enter marital status.
Personal Details - Emergency Contacts Page (see “Emergency Contacts (Summary) Page” (PeopleSoft eProfile))	HR_EMERG_CNTCT_FL	Add and review a list of your emergency contacts.
Summary Page	AGC_SUMMARY_FL	View a summary of your OnBoarding activities, mark a step complete, return to a specific step, or completing your OnBoarding activity guide.

(CAN) Completing OnBoarding Activity Guides for Canadian Workers

Employees and contingent workers working in Canada begin the OnBoarding event process by clicking the OnBoarding Tile to access the OnBoarding Dashboard. They will then select the OnBoarding Activities Tile from the dashboard to launch the activity guide.

After the worker accesses the OnBoarding activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the worker through the OnBoarding process. These steps are specific to Canadian workers and are defined in the delivered *OBDCAN1* OnBoarding template.

This topic lists the pages that come with the delivered *OnBoarding for Canada* (OBDCAN1) template.

Pages Used to Complete OnBoarding Activity Guides for Canadian Workers

The following table describes the activity steps that are delivered with the *OnBoarding for Canada* template. Use the links in the table to access documentation for each transaction.

Page Name	Definition Name	Usage
Before You Start Page	AGC_VIDEO_FL	Learn how to navigation the OnBoarding activity guide.
Welcome Page	AGC_VIDEO_FL	Watch a video or read a transcript welcoming you to the organization prior to initiating your OnBoarding event. This page may contain custom information about your organization.
Documents Page	HR_OBD_ATT_DNLD_FL	View, acknowledge, or upload documents provided by the organization.

Page Name	***Definition Name***	***Usage***
Attachments Page	HR_OBD_ATT_UPLD_FL	Upload copies of additional documents, such as certificates or identification information.
Personal Details — Verify Name Page [see “Name (Summary) Page” (PeopleSoft eProfile)]	HR_EE_NAME_FL	Verify your current name and enter a name change request, if needed.
Personal Details - Photo Page	HR_OBD_PHOTO_FL	Upload a photo of yourself to be stored in the HR system and enter any preferred names for yourself.
Personal Details - Verify Addresses Page [see “Addresses (Summary) Page” (PeopleSoft eProfile)]	HR_EE_ADDR_FL	Verify your home and mailing address and make updates, as needed.
Personal Details - Verify “Contact Details Page” (PeopleSoft eProfile)	HR_EE_CONTACTS_FL	Review or enter your phone numbers, email addresses, and instant messaging IDs
Personal Details - Marital Status Page [see “Marital Status or Divorce Status Page” (PeopleSoft eBenefits)]	HR_EE_MARITAL_FL	Enter marital status.
Personal Details - Emergency Contacts Page [see “Emergency Contacts (Summary) Page” (PeopleSoft eProfile)]	HR_EMERG_CNTCT_FL	Add and review a list of your emergency contacts.
Personal Details - Verify “Additional Information Page” (PeopleSoft eProfile)	HR_ADDTL_INFO_FL	Review miscellaneous personal information stored in the HR system. **Note:** This page is display only; you cannot update data on this page. Contact the HR department to make changes to this information.
Benefits - Benefits Enrollment Page	W3EB_ENR_SELECT	Access the pages to select benefits if you have an open enrollment event. See also “Using the PeopleSoft Fluid User Interface to Manage Benefits” (PeopleSoft eBenefits).
Talent Profile - Competencies Page	JPM_PERS_PROFL_FLU	Enter and rate your competency skill set to be stored in the Profile Management system. See “Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment).

Page Name	***Definition Name***	***Usage***
Talent Profile -Licenses and Certifications Page	JPM_PERS_PROFL_FLU	Enter the licenses and certifications you hold. See "Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft eDevelopment).
Talent Profile -Degrees Page	JPM_PERS_PROFL_FLU	Identify the degrees you hold and when you earned them. See "Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)" (PeopleSoft eDevelopment).
Payroll - Direct Deposit Page (see "Pay and Compensation - Direct Deposit Page" (PeopleSoft eBenefits))	PY_IC_DD_LIST	Enter direct deposit information using the classic pages.
Payroll - "Tax Withholding Page" (PeopleSoft ePay)	PY_W4_MAIN_FL	View a list of their tax withholding information and access the Tax Withholding Forms page for a jurisdiction.
Payroll - Voluntary Deductions Page	PY_IC_DED_LIST	Add voluntary deductions using the classic pages. See also "Viewing and Updating Voluntary Deductions" (PeopleSoft ePay).
Payroll - T4/T4A Consent Page	PY_SS_YE_CONS_CAN	Grant or withdraw consent to receive electronic year-end T4 or T4A slips for Canada. See also "Viewing Year-End Forms" (PeopleSoft ePay).
Payroll - RL1/RL2 Consent Page	PY_SS_YE_CONS_MRG	Grant or withdraw consent to receive electronic year-end RL1 or RL2 slips for Canada. See also "Viewing Year-End Forms" (PeopleSoft ePay).
Summary Page	AGC_SUMMARY_FL	View a summary of your OnBoarding activities, mark a step complete, return to a specific step, or completing your OnBoarding activity guide.

(USA) Completing OnBoarding Activity Guides for US Workers

Employees and contingent workers working in the USA begin the OnBoarding event process by clicking the OnBoarding Tile to access the OnBoarding Dashboard. They will then select the OnBoarding Activities Tile from the dashboard to launch the activity guide.

After the worker accesses the OnBoarding activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the worker through the OnBoarding process. These steps are specific to U.S. workers and are defined in the delivered *OBDUSA1* OnBoarding template.

This topic lists the pages that come with the delivered *OnBoarding for USA* (OBDUSA1) template.

Pages Used to Complete OnBoarding Activity Guides for U.S. Workers

The following table describes the activity steps that are delivered with the *OnBoarding for USA* template. Use the links in the table to access documentation for each transaction.

Page Name	***Definition Name***	***Usage***
Before You Start Page	AGC_VIDEO_FL	Learn how to navigation the OnBoarding activity guide.
Welcome Page	AGC_VIDEO_FL	Watch a video or read a transcript welcoming you to the organization prior to initiating your OnBoarding event. This page may contain custom information about your organization.
"(USA) Form I-9 Page" (PeopleSoft eProfile)	HR_I9_EE	Access the I-9 pages where you can read instructions and enter personal employee eligibility information,
Disability Page (see "Disability - Voluntary Self-Identification of Disability Page" (PeopleSoft eProfile))	HR_DISABILITY_FL	Complete and file Form CC-205 disability data electronically.
"Veteran Status Page" (PeopleSoft eProfile)	HR_VET_STATUS_FL	Enter self-identification veteran information
"Ethnic Groups Page" (PeopleSoft eProfile)	HR_ETHNIC_GRP_FL	Identify your ethnic group data.
Documents Page	HR_OBD_ATT_DNLD_FL	View, acknowledge, or upload documents provided by the organization.
Attachments Page	HR_OBD_ATT_UPLD_FL	Upload copies of additional documents, such as certificates or identification information.
Personal Details — Verify Name Page [see "Name (Summary) Page" (PeopleSoft eProfile)]	HR_EE_NAME_FL	Verify your current name and enter a name change request, if needed.

Page Name	***Definition Name***	***Usage***
Personal Details - Photo Page	HR_OBD_PHOTO_FL	Upload a photo of yourself to be stored in the HR system and enter any preferred names for yourself.
Personal Details - Verify Addresses Page [see “Addresses (Summary) Page” (PeopleSoft eProfile)]	HR_EE_ADDR_FL	Verify your home and mailing address and make updates, as needed.
Personal Details - Verify “Contact Details Page” (PeopleSoft eProfile)	HR_EE_CONTACTS_FL	Review or enter your phone numbers, email addresses, and instant messaging IDs
Personal Details - Marital Status Page (see “Marital Status or Divorce Status Page” (PeopleSoft eBenefits))	HR_EE_MARITAL_FL	Enter marital status.
Personal Details - Emergency Contacts Page [see “Emergency Contacts (Summary) Page” (PeopleSoft eProfile)]	HR_EMERG_CNTCT_FL	Add and review a list of your emergency contacts.
Personal Details - Verify “Additional Information Page” (PeopleSoft eProfile)	HR_ADDTL_INFO_FL	Review miscellaneous personal information stored in the HR system. **Note:** This page is display only; you cannot update data on this page. Contact the HR department to make changes to this information.
Talent Profile - Competencies Page	JPM_PERS_PROFL_FLU	Enter and rate your competency skill set to be stored in the Profile Management system. See also “Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment).
Talent Profile -Licenses and Certifications Page	JPM_PERS_PROFL_FLU	Enter the licenses and certifications you hold. See also “Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment).
Talent Profile -Degrees Page	JPM_PERS_PROFL_FLU	Identify the degrees you hold and when you earned them. See also “Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)” (PeopleSoft eDevelopment).

Page Name	***Definition Name***	***Usage***
Benefits - Benefits Enrollment Page	W3EB_ENR_SELECT	Access the pages to select benefits if you have an open enrollment event. See also “Using the PeopleSoft Fluid User Interface to Manage Benefits” (PeopleSoft eBenefits).
Benefits - ACA 1095–Consent Page (see “Form 1095-C Consent Page” (PeopleSoft eBenefits))	ACA_SS_CONSENT_FL	Grant or withdraw consent to receive electronic Form 1095-Cs. After saving an update on the page, you must enter password verification. After verification, the system displays confirmation of the submission and triggers an email confirmation of the change.
Payroll - Direct Deposit Page (see “Pay and Compensation - Direct Deposit Page” (PeopleSoft eBenefits))	PY_IC_DD_LIST	Enter direct deposit information using the classic pages.
Payroll - “Tax Withholding Page” (PeopleSoft ePay)	PY_W4_MAIN_FL	View a list of their tax withholding information and access the Tax Withholding Forms page for a jurisdiction.
Payroll - Voluntary Deductions Page	PY_IC_DED_LIST	Add voluntary deductions using the classic pages (see “Viewing and Updating Voluntary Deductions” (PeopleSoft ePay)).
Payroll - “W-2/W-2c Consent Page” (PeopleSoft ePay)	PY_W2_CONSENT_FL	Request or withdraw consent to receive electronic year-end slips or forms for the US.
Summary Page	AGC_SUMMARY_FL	View a summary of your OnBoarding activities, mark a step complete, return to a specific step, or completing your OnBoarding activity guide.

Viewing OnBoarding Activity Statuses as a Manager

The PeopleSoft application enables managers to view the status of their employee’s OnBoarding process using the OnBoarding Status page. The page will display all the steps corresponding to the OnBoarding template and the worker’s status for each individual step. The page enables you to send reminders to an employee to complete the OnBoarding process.

This topic discuss how to view OnBoarding activity statuses as a manager.

Related Links

Understanding OnBoarding

Accessing the PeopleSoft OnBoarding Dashboard and Pages

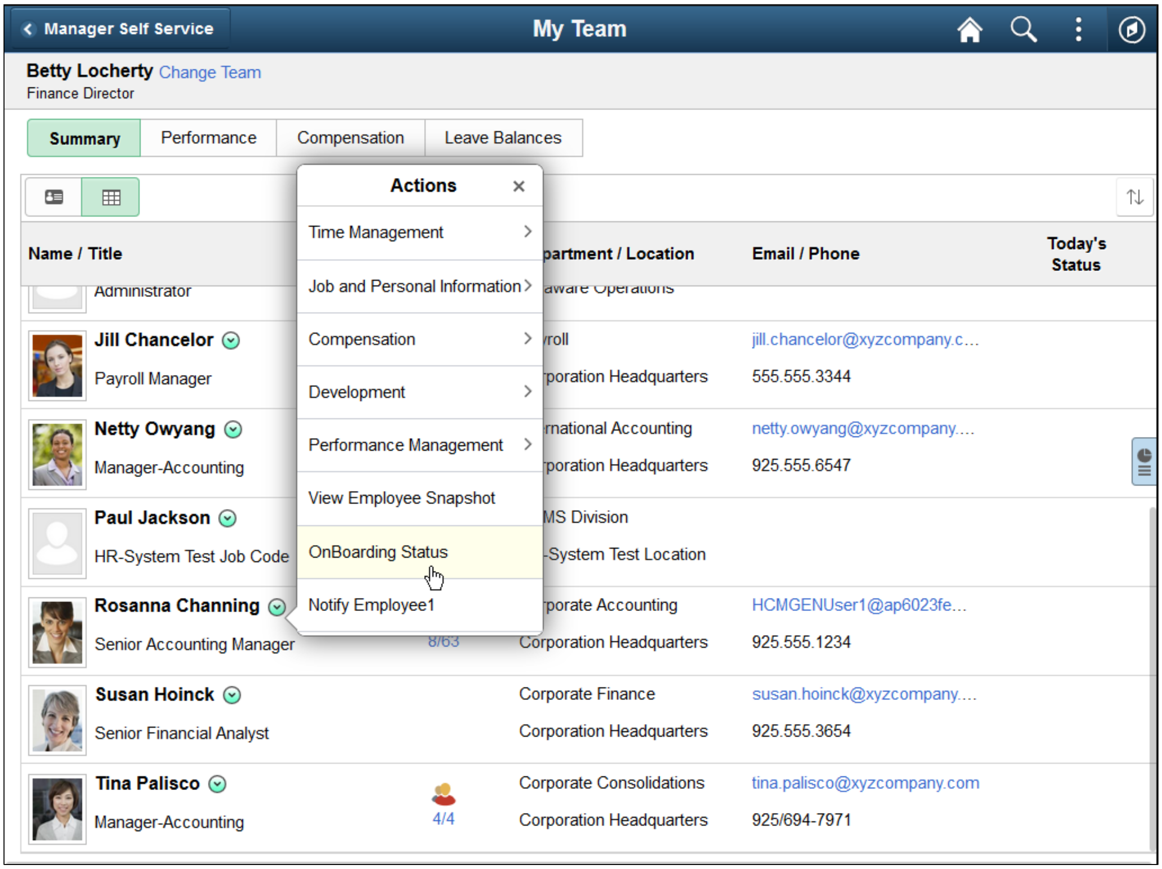
Pages Used to View OnBoarding Activity Statuses as a Manager

Page Name	***Definition Name***	***Usage***
OnBoarding Activities Page (for Managers)	HR_OBD_ST_LIST_FL	View the status of OnBoarding processes started by your employees. You can select an individual OnBoarding activity guide to view the status for the respective OnBoarding process.
OnBoarding Status Page (for Managers)	HR_OBD_STATUS_FL	View a worker's progress for an OnBoarding process as a manager.

Understanding How Managers Access the OnBoarding Activity Statuses for the Employees

Managers access the OnBoarding Activities and OnBoarding Status pages from the Related Actions menu. The Related Actions button appears next to your employee's names on fluid pages (such as My Team, eProfile, Org Chart/Company Directory, Employee Snapshot, and Total Rewards)). The **OnBoarding Status** item displays in the Related Actions menu when the employee has an OnBoarding process open. If there is not an OnBoarding process initiated by the employee, this option is not available in the menu.

This example illustrates the Related Actions menu when the OnBoarding Status item is available.



For more information about related actions, see “Related Actions for Manager Self Service Pages” (Application Fundamentals).

OnBoarding Activities Page (for Managers)

Use the OnBoarding Activities page for managers (HR_OBD_ST_LIST_FL) to view the status of OnBoarding processes started by your employees. You can select an individual OnBoarding activity guide to view the status for the respective OnBoarding process.

Note: The system displays this page if the employee has initiated more than one OnBoarding activity guide due to holding multiple jobs.

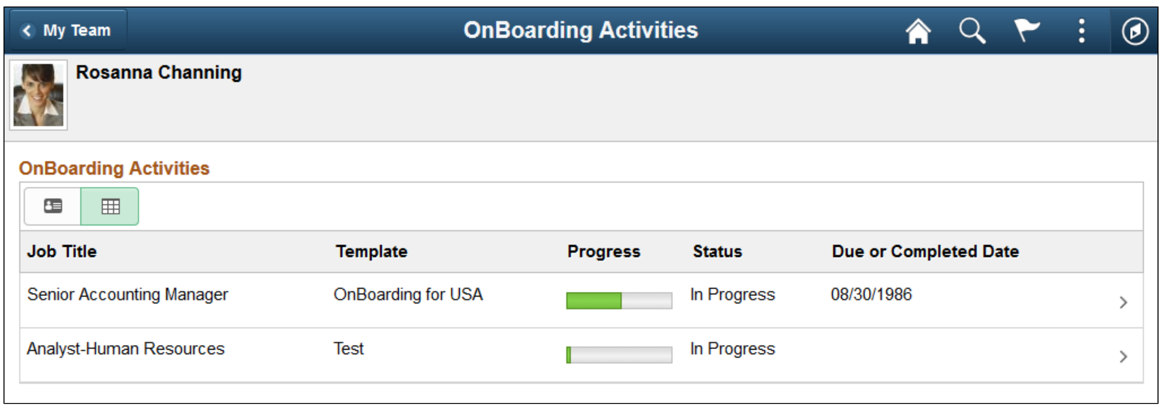
Navigation:

Select the **Related Actions** button next to one of your employees and select the OnBoarding Status link.

Note: When the employee has not started an OnBoarding process, this menu item will not be available from the Related Actions menu.

This example illustrates the card view on the OnBoarding Activities page for managers.

This example illustrates the grid view on the OnBoarding Activities page for managers.

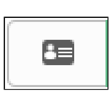


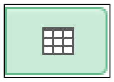
This video demonstrates Fluid OnBoarding Activities page for managers feature:

Video: Image Highlights, PeopleSoft HCM Update Image 24: Addition of Manager View of OnBoarding

When employees and contingent workers with multiple jobs begin several OnBoarding event processes, managers will be directed to this page to select the appropriate job transaction. The OnBoarding Activities page for managers is displayed only if the worker has multiple jobs and has executed multiple OnBoarding templates. If the worker has only one job (or uses the same OnBoarding template for the multiple jobs), the OnBoarding Status item from the Related Actions menu will directly launch the OnBoarding Status Page (for Managers) and not show this page.

The page displays the job title that initiated the trigger for the OnBoarding process. Managers will also see the OnBoarding templates the worker is completing along with the status for each process.

Field or Control	***Description***
 (Card View)	Click the Card View icon button to display information in a card or tile-like format. The card view is the default mode.

Field or Control	***Description***
 (Grid View)	Click the Grid View icon button to display the template process in a grid format. The grid shows the same information as the card.

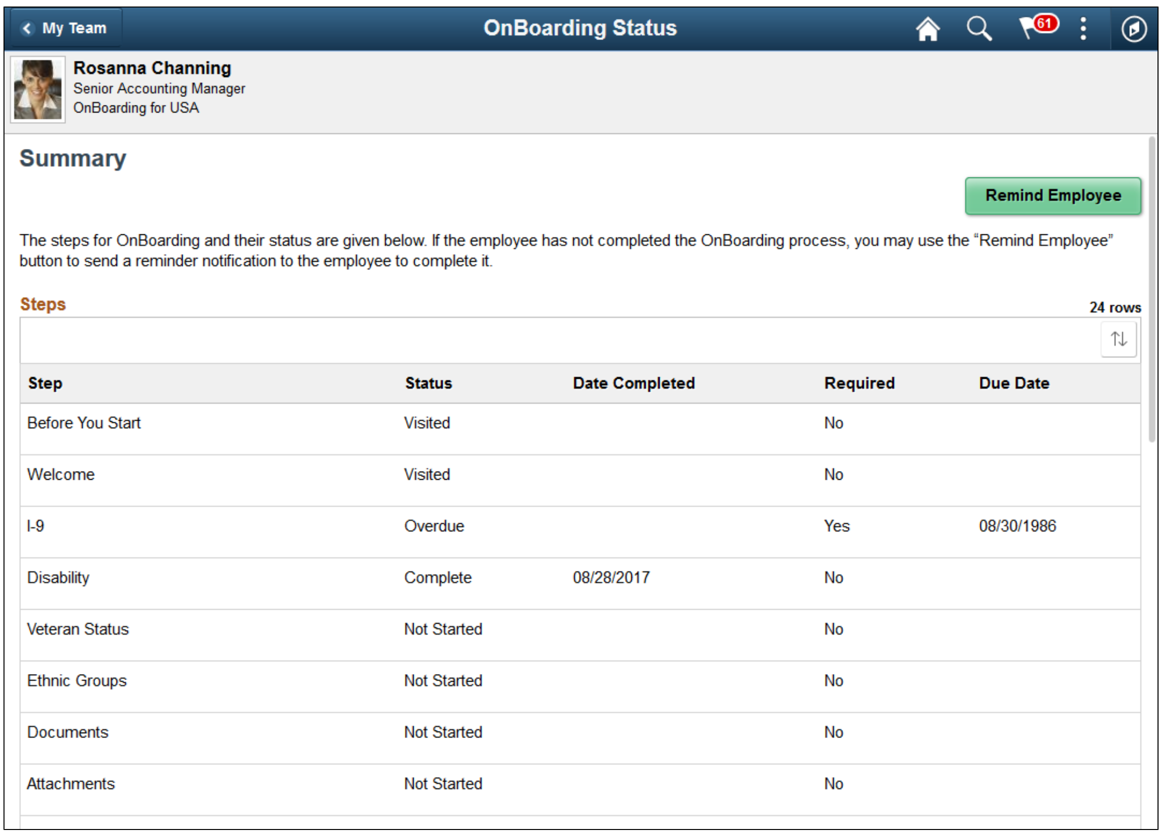
Click a card or row to access the OnBoarding Status Page (for Managers) for that OnBoarding template.

OnBoarding Status Page (for Managers)

Use the OnBoarding Status page (HR_OBD_STATUS_FL) to view a worker's progress for an OnBoarding process as a manager.

- Click the OnBoarding Status options from the Related Actions button next to the employee's name.
- Select a job transaction card or row from the OnBoarding Activities Page (for Managers) when an employee has multiple OnBoarding transactions active.

This example illustrates the grid view on the OnBoarding Status page.



The header of the page displays the employee and OnBoarding template for the job transaction he or she is completing.

Use this page to view a summary of the steps the employee has not started, visited, completed, or may be overdue.

Field or Control	Description
Remind Employee	Click this button to send a notification to the employee to remind him or her to complete the OnBoarding process for this transaction. The notification reminder template is defined on the OnBoarding Installation Page, or if you're using the Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

Administrators use the OnBoarding Status Page (for Administrators) to view the status of a worker's OnBoarding process. Depending on the setup, administrators also have the ability to mark individual steps as *Complete* or delete or complete an entire OnBoarding process.

Viewing OnBoarding Insights

PeopleSoft OnBoarding Insight and OnBoarding Manager Insight dashboards provide administrators and managers the ability to view and analyze OnBoarding data using PeopleSoft Insights visualizations.

Based on user privileges, administrators and managers can access the visualizations delivered on the OnBoarding Insight and OnBoarding Manager Insight dashboards to monitor where a group of employees are overall through the OnBoarding process. While administrators have access to OnBoarding information for the entire company, managers are given a view of just the employees that mean the most to them, their direct and indirect reports.

These OnBoarding analytic dashboards are built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. OnBoarding data that is visible on the administrator's and manager's dashboards come from the OnBoarding Activity Guide search index.

This topic provides an overview of how to set up Insights dashboards for OnBoarding analytics, lists common elements and controls, and discusses the PeopleSoft Insights OnBoarding dashboards.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

For information on Insights dashboards, see:

- "Understanding PeopleSoft Insights" (Application Fundamentals)
- *PeopleTools Search Technology:* "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

Pages Used to View OnBoarding Insights

Page Name	*Definition Name*	*Usage*
OnBoarding Insight Tile (for Administrators)	HC_HR_ONBOARDING_INSIGHTS_FL (this is the cref for the tile)	Access and view OnBoarding Insight analytics as an administrator.
OnBoarding Insight Dashboard (for Administrators)	PTSF_KIBANA_COMP	Review and analyze OnBoarding data as an administrator using visualizations.
OnBoarding Manager Insight Tile (for Managers)	HC_HR_ONBOARD_MGR_INSIGHTS_FL (this is the cref for the tile)	Access and view OnBoarding activity guide analytics for employees under your supervision.
OnBoarding Manager Insight Dashboard (for Managers)	PTSF_KIBANA_COMP	Review and analyze visualizations for OnBoarding data for employees under your supervision.

Understanding How to Set Up Insights Dashboards for OnBoarding Analytics

Before administrators or managers can access the visualizations for OnBoarding data, the following steps should be performed:

1. Deploy these indexes for the following users:

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Deploy/Delete Object**)

   - *Administrator*: *HC_HR_ONBOARDING_ADM* (OnBoarding Administrator Insights)
   - *Manager*: *HC_HR_ONBOARDING_MGR* (OnBoarding Manager Insights)

2. Build the following search indexes:

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Schedule Search Index**)

   - *Administrator*: *HC_HR_ONBOARDING_ADM*
   - *Manager*: *HC_HR_ONBOARDING_MGR*

3. Deploy the following tiles and dashboards:

   (**PeopleTools** > **Search Framework** > **Administration** > **Deploy Insights Dashboards**)

   - Administrator: *OnBoarding Insight Tile* and *OnBoarding Insight*.
   - Manager: *OnBoarding Manager Insight Tile* and *OnBoarding Manager Insight*.

Note: The full index must be run before the dashboard can be deployed.

4. Assign roles to the following users to grant them access to view OnBoarding visualization tiles and dashboards:

   - Administrator: *OnBoarding Administrator* role for the OnBoarding Insight tile and dashboard.
   - Manager: *OnBoarding Manager* role for the OnBoarding Manager Insight tile and dashboard.

Real Time Indexes for OnBoarding Visualizations

The OnBoarding search indexes support real time indexing (RTI) with a minimum PeopleTools version. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

Search Definition	***Minimum PeopleTools Release***	***Usage***
OnBoarding Administrator Insights HC_HR_ONBOARDING_ADM	8.61.03A	Allows administrators to view OnBoarding information.
OnBoarding Manager Insights HC_HR_ONBOARDING_MGR	8.61.03A	Allows managers to view OnBoarding information for their employees.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, “Administering Real Time Indexing."

Related Links

“Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)

“Understanding Real Time Indexing in HCM” (Application Fundamentals)

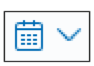
Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Search and Filter Options:

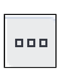
Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Field of Control	***Definition***
Search field	Enter a query to filter data, if applicable.
 (Change all filters) and **+ Add filter** icon and link	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the **Search** field. • Use the **+ Add filter** link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the **OnBoarding Employees** grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the **+ Add filter** link for reference. For example, when you select a chart item, the filter is automatically added to your filters list. When you click a chart item, such as the horizontal bar item for *Talent Profile* for within Step Status, the system will prompt you to add the *Step/Task: Talent Profile* and *Status: Visited* filters since this item consists of more than one filter. Select the **Change all filters** icon for a list of actions that can be performed on *all* filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.
 (Calendar) or **Show dates** icon and link	Click to select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, *This week*, or *Last 30 days*, click the **Show dates** link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is *Year to date*. Clicking the **Show dates** link displays ~ *10 months ago —> now*, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.

Field of Control	***Definition***
• (Administrator) OnBoarding Insight dashboard **OnBoarding Template**, **Company**, **Business Unit**, **Department**, **Manager Direct Reports**, and **Manager All Reports** fields • (Manager) OnBoarding Manager Insight dashboard **Department** and **Manager** fields	(Administrator) Select to filter OnBoarding data by template, company, business unit, department, manager direct reports, and manager all reports. (Manager) Select to filter OnBoarding data by department and manager.
Apply changes button	This button is available after you select filters. Select the this button after you select filters to update all visualizations.
Cancel changes link	This button is available after you select filters. Select this link to remove any update you entered since the last time you applied changes.
Clear form link	This button is available after you select filters. Select the this link to remove all the values from the filter fields in this section. You must select the **Apply changes** button to update the visualizations.

Visualization Options:

When you pause over a visualization, the **Options** and **Legend** icons (if applicable) are displayed on the top right and bottom left corners respectively. Use them to inspect the chart or table and view the details of that visualization and toggle the legend display.

Field or Control	***Definition***
 (Options) icon	Click the Options icon to select one of these options: • *Inspect*: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • *Maximize panel* or *Minimize*: Select *Maximize panel* to have the page display this visualization in full screen. Select *Minimize* to return to the dashboard and display all visualizations.

Field or Control	*Definition*
(Toggle legend) icon	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

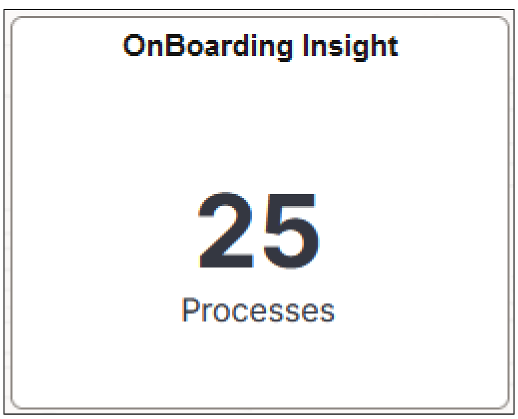
OnBoarding Insight Tile (for Administrators)

Administrators use the OnBoarding Insight tile to access and view OnBoarding Insight analytics as an administrator.

Navigation:

The OnBoarding Insight tile is located on the "Workforce Administrator Homepage" (Application Fundamentals).

This example illustrates the OnBoarding Insight tile.



This tile displays the number of In Progress and Complete OnBoarding activity guide processes (based off of the default dashboard period of time of 15 years).

Select this tile to access the OnBoarding Insight Dashboard (for Administrators) and analyze visualizations related to OnBoarding information for the organization.

OnBoarding Insight Dashboard (for Administrators)

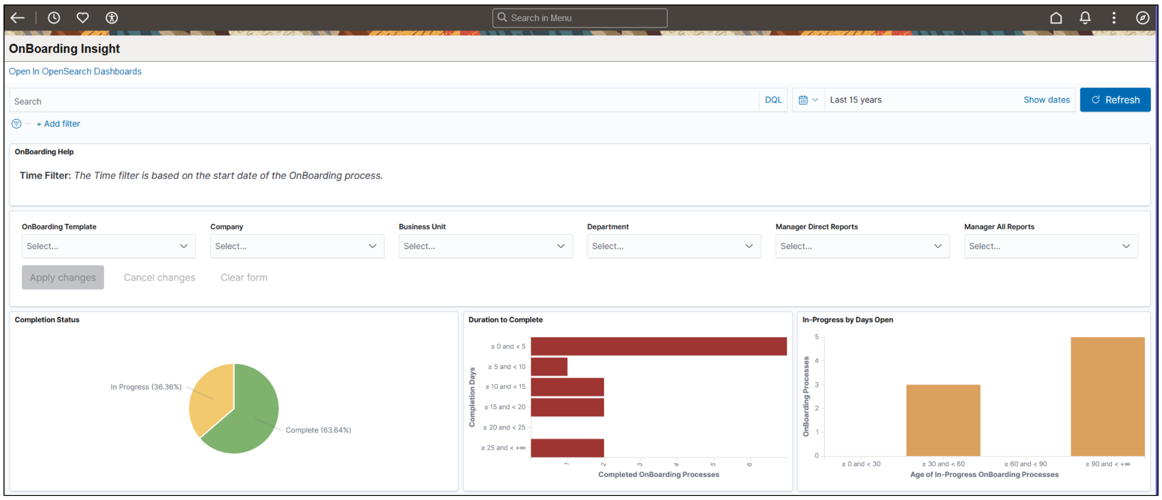
Administrators use the OnBoarding Insight dashboard to review and analyze OnBoarding data using visualizations.

Navigation:

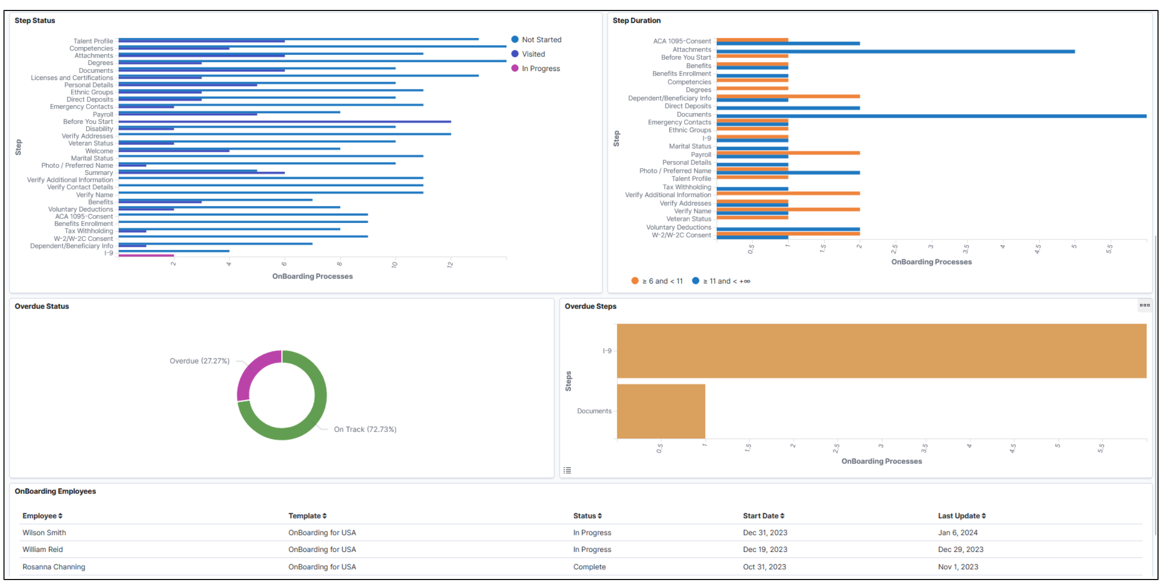
Workforce Administrator home page > OnBoarding Insight tile

Note: You must be assigned the *OnBoarding Administrator* role to view this dashboard.

This example illustrates the fields and controls on the OnBoarding Insight Dashboard (1 of 2).



This example illustrates the fields and controls on the OnBoarding Insight Dashboard (2 of 2).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

Filters

For a list of filters available for the administrator OnBoarding Insights dashboard, see the Common Elements and Controls section in this documentation.

OnBoarding Insight Visualizations

The OnBoarding Insight dashboard provides you with the following collection of interactive visualizations to view and analyze OnBoarding data for your organization.

Note: The data displayed is based on the security defined for the search index.

Important! For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

Visualization	***Description***
Completion Status pie chart	This panel displays what percentage of OnBoarding activity guide processes are in progress and what percentage are complete.
Duration to Complete horizontal bar chart	This visualization displays the calculated number of days individuals used to complete the OnBoarding activity guide process.
In-Progress by Days Open Vertical bar chart	This visualization displays the number of activity guide processes that have been in progress less than 30 days, between 31 to 60 days, those that have been in progress 61-90 days, and those that are over 90 days.
Step Status horizontal bar chart	This bar chart displays the steps within the OnBoarding activity guide and the number of OnBoarding processes by step status for each step. Step statuses are *Not Started*, *In Progress*, *Visited*, and *Complete*.
Step Duration horizontal bar chart	This visualization displays how long individuals completing activity guide processes have been on a step. These include less than 5 days, between 6 to 10 days, and those that have been on the step for 11 or more days.
Overdue Status donut chart	This chart displays the percentage and count of activity guide processes that are on track (completed before the due date of a step) and those that are *Overdue* (contain one or more steps that are beyond the resolution date).

Visualization	*Description*
Overdue Steps horizontal bar chart	This visualization displays the steps and the number of in progress activity guide processes that were not completed by the minimum due date.

OnBoarding Employees (Details Grid)

This grid lists the employees, which are presented in visualizations, in a tabular format.

Field or Control	*Description*
(Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
(Filter for value) and (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a **Status** value, all visualizations will refresh to show employees with that OnBoarding status. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the *Complete* value in the **Status** column, visualizations will refresh to show information for all statuses except *Complete*. Filters can be removed from the Filters area at the top of the page.
Export links: • **Raw** • **Formatted**	Click to export data from the grid into a .csv file format.

Related Links

Understanding OnBoarding
Using OnBoarding Pages

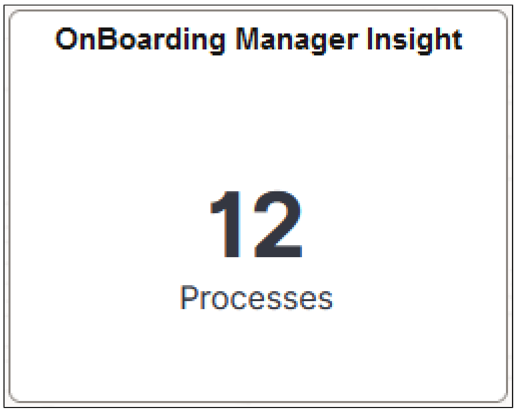
OnBoarding Manager Insight Tile (for Managers)

Managers use the OnBoarding Manager Insight tile to access and view OnBoarding activity guide analytics for employees under your supervision.

Navigation:

The OnBoarding Manager Insight tile is located on the “Manager Self Service Homepage” (Application Fundamentals).

This example illustrates the OnBoarding Manager Insight tile.



This tile displays the number of OnBoarding activity guide processes In Progress and Complete for employees under your supervision (based off of the default dashboard period of time of 15 years).

Select this tile to access the OnBoarding Manager Insight Dashboard (for Managers) and analyze interactive visualizations related to OnBoarding processes for your employees.

OnBoarding Manager Insight Dashboard (for Managers)

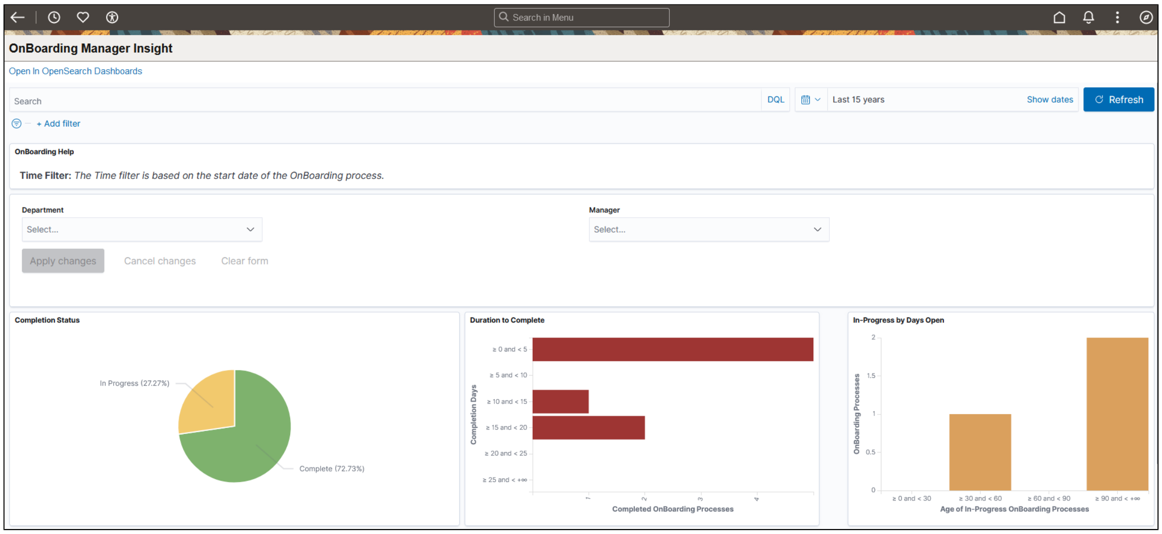
Managers use the OnBoarding Manager Insight dashboard to review and analyze visualizations of OnBoarding data for employees under your supervision.

Navigation:

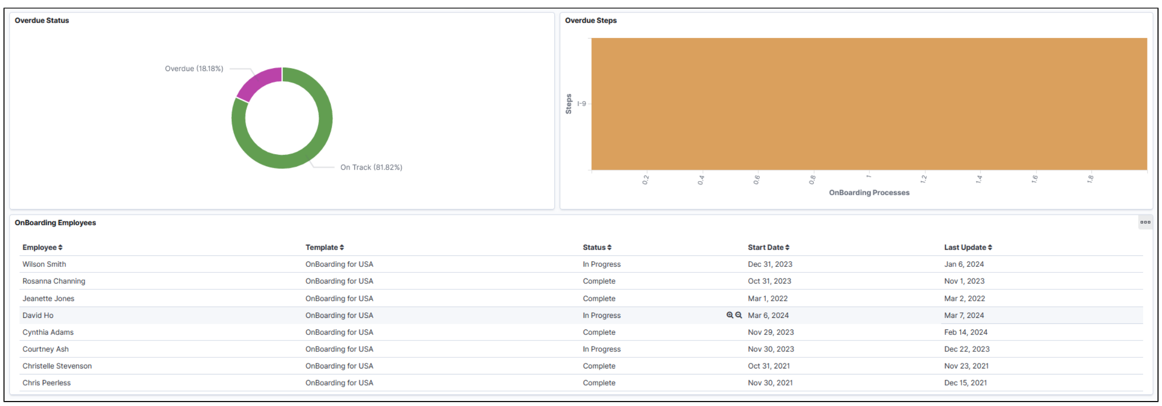
Manager Self Service home page > **OnBoarding Manager Insight tile**

Note: You must be assigned the *OnBoarding Manager* role to view this dashboard.

This example illustrates the fields and controls on the OnBoarding Manager Insight Dashboard (1 of 2).



This example illustrates the fields and controls on the OnBoarding Manager Insight Dashboard (2 of 2).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

Filter By

For a list of filters available for the OnBoarding Manager Insights dashboard, see the Common Elements and Controls section in this documentation.

OnBoarding Manager Insight Visualizations

The OnBoarding Manager Insight Dashboard provides you with the following collection of visualizations to view and analyze OnBoarding data as a manager.

Note: The data displayed is based on the security defined for the search index. For example, a manager will only have access to their direct and indirect reports.

Important! For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

Visualization	***Description***
Completion Status pie chart	This panel displays what percentage of OnBoarding activity guide processes for your employees are in progress and what percentage are complete.
Duration to Complete horizontal bar chart	This visualization displays the calculated number of days individuals under your supervision took to complete the OnBoarding activity guide process.
In-Progress by Days Open vertical bar chart	This visualization displays the number of activity guide processes under your supervision that have been in progress less than 30 days, between 31 to 60 days, those that have been in progress 61-90 days, and those that are over 90 days.
Overdue Status donut chart	This chart displays the percentage and count of activity guide processes that are on track (completed before the due date of a step) and those that are *Overdue* (contain one or more steps that are beyond the resolution date) for your team members.
Overdue Steps horizontal bar chart	This visualization displays the steps and the number of in progress activity guide processes for your employees that were not completed by the minimum due date.

OnBoarding Employees (Details Grid)

This grid lists the employees, which are presented in visualizations, in a tabular format.

Field or Control	***Description***
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.

Field or Control	***Description***
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a **Status** value, all visualizations will refresh to show employees with that OnBoarding status. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the *Complete* value in the **Status** column, visualizations will refresh to show information for all statuses except *Complete*. Filters can be removed from the Filters area at the top of the page.
Export links: • **Raw** • **Formatted**	Click to export data from the grid into a .csv file format.

Chapter 12

Working with OffBoarding

Understanding OffBoarding

OffBoarding is the action or process of manage the tasks that need to be completed when an employee leaves your organization.

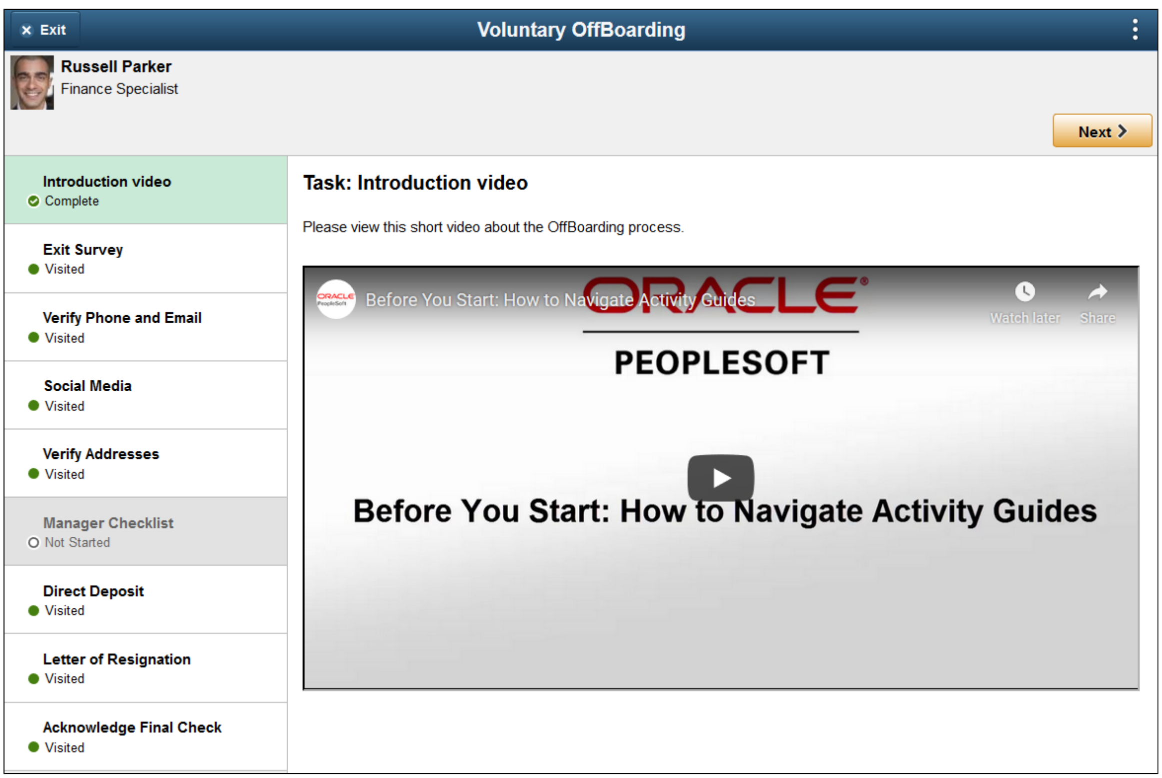
PeopleSoft OffBoarding is inclusive of all individuals involved in the termination process, such as the employee, manager, IT staff, and others, and leads them through the required steps to complete the exit process. The PeopleSoft OffBoarding pages comprise of tasks, or steps, that are assigned and routed to each individual that is involved in the separation process.

The following videos provide an overview and demonstration of using PeopleSoft OffBoarding:

Video: Image Highlights, PeopleSoft HCM Update Image 32: OffBoarding

Video: PeopleSoft OffBoarding

This example illustrates the layout of the OffBoarding component.



The PeopleSoft OffBoarding feature:

- Enables template administrators to set up templates using the Activity Guide Composer to identify the steps and data required from the workers.

Provides a Template Assignment engine where you define your organizational rules on how to automatically assign the appropriate template to a person, even utilizing the action reason.

- Gives OffBoarding administrators the ability to automatically assign the OffBoarding role to users, manage template assignments, and maintain document configurations and worker document uploads.
- Notifies participants that the OffBoarding process is available and provides a link to the OffBoarding dashboard, where they can enter the specified data from one location.

Related Links

"Understanding the Activity Guide Composer" (Enterprise Components)

Managing OffBoarding

Using the OffBoarding Pages

Getting Started with OffBoarding

PeopleSoft OffBoarding uses activity guides, which provide your staff with a simplified and streamlined approach to complete the OffBoarding business process. Activity guides track and maintain the various users' progress as they perform the necessary, or steps, to complete a worker's separation from the organization. PeopleSoft OffBoarding uses the PeopleSoft Activity Guide Composer framework that is designed to improve the deployment and management of fluid activity guides. This framework provides utilities and configurable steps that are commonly utilized in activity guides.

Although the PeopleSoft application delivers several ready to use OffBoarding templates, your organization may clone or define your own templates that you can assign to the OffBoarding participants.

These topics provide an overview of Activity Guide Composer setup tables for OffBoarding, working with OffBoarding categories and templates, and configuring templates for your environment.

Related Links

"Understanding the Activity Guide Composer" (Enterprise Components)

Understanding the Activity Guide Composer Setup Tables for OffBoarding

To support your OffBoarding process, you will use the following steps to configure and assign OffBoarding activity guide templates to your participants in the OffBoarding process. For more detailed information on these procedures, see the corresponding documentation.

1. Set Up Activity Guide Categories

   Categories contain the technical components that are utilized to define an activity guide template. For example, categories contain the technical definition of one or more steps that can be included in an activity guide. See the "Setting Up Activity Guide Categories" (Enterprise Components) documentation and the Working with OffBoarding Categories topic below.

2. Create Activity Guide Templates

   Activity guide templates identify the exact configuration and steps end users will follow to complete the OffBoarding experience. Activity guide templates are created and managed by template administrators—functional personnel who are very familiar with your organization's HR transaction processes. See “Managing Activity Guide Templates” (Enterprise Components) documentation and the Working with OffBoarding Templates topic below.

3. Configure Documents

   Documents can be associated with your OffBoarding activity guide templates and enable your employees to download and view, take action, or attach documents that are vital to the employment process. See the Configure Documents - Documents Page and Configure Documents - Templates Page.

4. (Optional) Set Up Template Assignment

   Template Assignment is a feature within the Activity Guide Composer framework that enables you to define tables and rules to automatically assign activity guide templates. See the “Setting Up Activity Guide Utilities for Template Assignment” (Enterprise Components) documentation and the Working with Template Assignments topic below.

5. Create and Publish OffBoarding Tiles

   You will use Activity Guide Composer utilities to create and publish your OffBoarding tiles to allow participants easy access to the activity guide process. Use the Activity Guide Tiles page to configure and identify which templates will use the tile and grant participant access. See the “AG Composer Tiles Page” (Enterprise Components) documentation.

   Note: The PeopleSoft HCM application does not deliver OffBoarding tiles. However, it does deliver the *PS_OFFBOARD_L_FL* (Employee OffBoarding tile) and *PS_OFFBOARD_MSS_L_FL* (MSS OffBoarding) image icons to use when creating tiles.

6. Define OffBoarding Installation Settings

   Use the OffBoarding Installation table to assign OffBoarding information to participants. This includes the activity guide category, participant configuration, and how to assign an OffBoarding template (by using a default template or the Template Assignment feature). See the OffBoarding Installation Page documentation.

7. Manage OffBoarding Events (as needed)

   Use the Manage OffBoarding Event page to add an OffBoarding activity guide trigger for a person who is missing a job assignment trigger or to correct an incorrect template assignment. See the Manage OffBoarding Event Page.

   Note: An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed.

Working with OffBoarding Categories

A category definition contains the properties, contextual data, steps, and other options that can be included in an activity guide template. You will use the Categories component to associate these steps to a related content service that navigates the user to an application transaction page to perform a specific task. Not all steps need be included in a template, but all possible steps must be included in the category to be considered for a template. For example, you may have additional steps in a voluntary separation from the company that you would not include with an involuntary termination. The template administrator will then determine which steps to include in a template.

The PeopleSoft application delivers the *OFFBOARDING* activity guide category.

Delivered OffBoarding Category Steps

The following table lists the delivered steps for the *OFFBOARDING* category:

Step	***Description***	***Additional Information***
ACKNOWLEDGEMENT	Acknowledgement of submission of final expenses	The system delivers the *OFB1* (acknowledgement of submission of final expenses) parameter value as temporary data for this step as the acknowledgement parameter under the Additional Step Content section of the “AG Composer Categories - Steps Page” (Enterprise Components). **Important!** You will need to change the parameter based on the Acknowledgement ID you create using the Acknowledgement Framework. For information on Acknowledgement Framework, see “Understanding the Acknowledgement Framework” (Enterprise Components).
ACKNOWLEDGEMENT2	Acknowledgement of final check receipt	The system delivers the *OFB2* (acknowledgement of final check receipt) parameter value as temporary data for this step as the acknowledgement parameter under the Additional Step Content section of the “AG Composer Categories - Steps Page” (Enterprise Components). **Important!** You will need to change the parameter based on the Acknowledgement ID you create using the Acknowledgement Framework.
DIRECT_DEPOSITS_FL	Fluid Direct Deposits	

Step	***Description***	***Additional Information***
DOC_DOWNLOAD	Documents	The download Documents step is preconfigured for the OffBoarding process. All preconfigured documents matching the template will be selected for this step regardless of an assigned Document Group when no Related Data, Data Field 1 value on the "AG Composer Categories - Steps Page" (Enterprise Components) is specified.
DOC_UPLOAD	Attachments	
INTRODUCTION	Before to start video	
MGR_VCHKLIST	(Classic) Manager Voluntary Termination checklist	For the *OffBoarding* category, access the "AG Composer Categories - Steps Page" (Enterprise Components), **Related Data** section for this step to identify which checklist to display in the activity guide.
MGR_VCHKLIST_FL	(Fluid) Fluid Manager Voluntary Termination checklist	For the *OffBoarding* category, access the "AG Composer Categories - Steps Page" (Enterprise Components), **Additional Step Content** section for this step to identify which checklist to display in the activity guide.
SOCIAL_MEDIA	Social Media	
SURVEY	OffBoarding Survey	Surveys are set up using the Questionnaire framework. For more information on this, see "Understanding Questionnaire Framework" (Enterprise Components).
VERIFY_ADDRESS	Verify Addresses	
VERIFY_CONT_DTL	Verify Contact Details	

Related Links

"Setting Up Activity Guide Categories" (Enterprise Components)

"Cloning Activity Guide Categories" (Enterprise Components)

Working with OffBoarding Templates

The Activity Guide Composer uses fluid pages to create templates that identify the steps a user should take to perform a transaction or process. You will use the Activity Guide Composer - Templates component to define the activity guide layout, assign a category, identify the security roles that can access the OffBoarding templates and activity guides, identify actions the user can take, and identify the steps that a new employee would need to complete during the OffBoarding process.

PeopleSoft HCM delivers the following, ready to use, OffBoarding activity guide templates.

- *OFBINVO* – Involuntary OffBoarding
- *OFBVOL1* – Voluntary OffBoarding

Delivered OffBoarding Template Steps

All delivered templates use the vertical non-sequential layout that has the navigation steps appear in the left panel of the page.

The following table lists the delivered steps for the delivered OffBoarding templates:

Template	***List of Page Steps***
OFBINVO – Involuntary OffBoarding	Completing the Involuntary OffBoarding Activity Guide
OFBVOL1 – Voluntary OffBoarding	Completing the Voluntary OffBoarding Activity Guide

Related Links

“Managing Activity Guide Templates” (Enterprise Components)

Customizing Categories and Templates

Although the application delivers categories and templates for your OffBoarding activity guides, you have the ability to:

- Create your own categories and templates.
- Use the delivered data as a starting point for your own categories and activity guide templates.

The fields for delivered data are disabled and unavailable for update. Although you cannot update the delivered data, you can make modifications to delivered or existing categories and templates to suit your organization's needs. This is done by using one of these methods and making the modifications:

- Inserting a new effective dated row.
- Cloning a category or template.

Warning! When you make modifications to a template (by either inserting a row or cloning), you cannot change the activity guide type (layout) or category. To have a template that does not use the same layout type or category, you will need to create a new template instead of cloning or inserting a new effective dated row.
For more information on setting up activity guide categories or templates, see the “Setting Up Activity Guide Categories” (Enterprise Components) and “Managing Activity Guide Templates” (Enterprise Components) documentation.

Considerations for Configuring Categories for Your Environment

Important! Oracle strongly recommends that you use the delivered *OFFBOARDING* category.

If you need to make updates to the OffBoarding category, consider the following:

- OffBoarding categories should always use the *EMPLID* and *EMPL_RCD* context key fields. The OffBoarding template creation process makes the assumption that an OffBoarding process is created for a job termination.
- To add or remove steps from an existing category, you will need to add a new effective dated OffBoarding category row and add or delete the steps.

  Important! If you do this for a category that is already associated with a template, you will need to insert a row in the template with a date equal to or later than the row with the new or deleted step to apply those changes to your template. The system will not automatically insert the step into the template, but you can now opt to include this new step into the template.

  For example, you want to add a new step to the *OFFBOARDING* category, access the *OFFBOARDING* category and insert a new effective dated row.

  In order to add that new step to your OffBoarding templates, you will need to insert an effective dated row equal to or greater than the category row to see the new step you added to the category. To insert the new row in the template, access the “Activity Guide Composer - Select Steps Page” (Enterprise Components). The new step will be available to add to the template.
- You can clone the delivered *OFFBOARDING* category by accessing the “Clone Category Page” (Enterprise Components), selecting the category and effective dated row you want to copy, enter the new category details, and click **Clone Category** to save a copy of the category. You will need to navigate to the Categories component where you can update this new category (see “Setting Up Activity Guide Categories” (Enterprise Components)).

Considerations for Configuring Templates for Your Environment

If you want to use the delivered templates as a basis for your OffBoarding templates, consider the following:

- In order to make modifications to delivered templates, access the “Activity Guide Templates Page” (Enterprise Components) and do one of the following:
  - Insert a new effective dated row by clicking the **Update Template** button to access the “Update Template Page” (Enterprise Components) and click the Add button, This will insert a new effective dated row where you can enter the new date. Apply the change and click the **Update Template** button to access the template and make the changes.

- Clone a delivered template by clicking the **Clone Template** button for the desired template. On the "Clone Template Page" (Enterprise Components) select the effective dated row you want to copy, enter the new template details, and click Continue to save a copy of the template. You will be returned to the Activity Guide Templates page where you can select to update this template.

Note: These actions will copy all the configuration setup for this template, including the status of the template at the time of inserting a row or cloning. You can change the auto save functionality, security roles, actions, step configuration, and status, but you cannot change the activity guide layout type and category.

To inactivate a delivered template, insert a row with a new effective date, access the "Activity Guide Composer - Review and Activate Page" (Enterprise Components) and click the **Deactivate Activity Guide** button.

- If you do not want to use the same category or activity guide type (layout style) as an existing template, create a new template instead of cloning or inserting a new effective dated row.
- If you have documents that *must* be acknowledged, updated and uploaded, or just uploaded, make the document-related steps (Documents, Attachments, and so forth) required on the "Configure Attributes Page" (Enterprise Components).

Working with Template Assignments

The Activity Guide Composer framework provides you with the ability to configure rules to determine which OffBoarding template that should be assigned to a person. This is configured through the Activity Guide Utilities - Template Assignment feature. For detailed information on setting up template assignments, see the corresponding documentation.

To set up template assignments for activity guides:

1. Identify source criteria fields that are derived from the key structure of a source table using the "Search Key Source Tables Page" (Enterprise Components).
2. Identify search key source configurations using the "Search Keys Page" (Enterprise Components).
3. Enter search keys and values for the template assignment definition in the Template Assignment component ("AG Composer Tmplt Asgnmt - General Page" (Enterprise Components) and "AG Composer Tmplt Asgnmt - Template Assignment Page" (Enterprise Components)).
4. Test the Template Assignment process using the "Test Template Assignment Page" (Enterprise Components).
5. Set up the OffBoarding Installation Page to use the Template Assignment feature to customize which OffBoarding activity guide templates are assigned to individuals.

Delivered Search Keys Source Tables

The following table lists the delivered search key source tables for template assignment, but you can add your own:

Search Key	***Description***
BEN_PROG_PTC_VW	Employee Benefit Programs
JOB	Employee Job History
JOB_ACTION_VW	Job - Action view
JOB_ACTRSN_VW	Job - Action Reason view
JOB_JOBCD_VW	Job - Jobcode view
JOB_POSN_VW	Job - Position view

Delivered Search Keys

The following table lists the delivered search keys for template assignment, but you can add your own:

Search Key	***Description***
ACTION	Action
ACTION_REASON	Action Reason
ACTION_TYPE	Action Type
ACTN_REASON_TYPE	Action Reason Type
BENEFIT_PROGRAM	Benefit Program
BUSINESS_UNIT	Business Unit
COMPANY	Company
DEPARTMENT	Department
EMPLOYEE_TYPE	Employee Type
FULL_PART_TIME	Full/Part Time Indicator

Search Key	***Description***
GRADE	Salary Grade
JOBCODE	Job Code
JOB_FAMILY	Job Family
JOB_FUNCTION	Job Function
LOCATION	Location
PER_ORG	Organization Relationship
POSITION	Position
REG_REGION	Regulatory Region
UNION	Union

Managing OffBoarding

To manage OffBoarding, use the OffBoarding Installation (HR_OFB_INSTALL), Manage OffBoarding Event (HR_OFB_MNG_EVENT), Document Groups (HR_OBD_DOC_GRP), Configure Documents (HR_OBD_CFG_DOC), and Employee Documents (HR_OBD_EMP_DOCS) components.

Note: Both OnBoarding and OffBoarding use the Document Groups (HR_OBD_DOC_GRP), Configure Documents (HR_OBD_CFG_DOC), and Employee Documents (HR_OBD_EMP_DOCS) setup components, which pertain only to the Documents and Attachments steps of these types of activity guides. Other pages where attachments are available use the Attachments Framework and do not use these setup and file management components.

These topics give an overview of OffBoarding triggers and handlers and discuss how to set up OffBoarding tables.

Pages Used to Manage OffBoarding

Page Name	***Definition Name***	***Usage***
OffBoarding Installation Page	HR_OFB_INSTALL	Identify the OffBoarding category, participants, and template assignment settings.
Manage OffBoarding Event Page	HR_OFB_MNG_EVENT	Add an OffBoarding trigger for a person who is missing a trigger or correct an incorrect template assignment.
Document Groups Page	HR_OBD_DOC_GRP	Define document groups for organizing your documents.
Configure Documents - Documents Page	HR_OBD_CFG_DOC	Set up document configuration for activity guides (i.e.- OnBoarding and OffBoarding), such as the types of documents to view or upload, if an employee needs to take action on the document, and attach documents.
Configure Documents - Templates Page	HR_OBD_CFG_DOC_TMP	Identify which templates should display this document.
Employee Documents Page	HR_OBD_EMP_DOCS	View the documents that workers have acknowledged or uploaded **Note:** This is only for Attachments and Documents steps and not for attachments uploaded in other steps.

Note: You will need to assign the delivered *OffBoarding Administrator* role to users to grant them access to these pages.

Understanding OffBoarding Triggers and Handlers

The handler, *CreateOFBInstance*, is part of the Event Manager *AssignmentTerminated* event (**Enterprise Components** > **Events & Notifications** > **Event Framework** > **Event Registry**). The *AssignmentTerminated* event is raised for the *Termination* type of Job Data actions.

The handler will do these things:

- Add the appropriate OffBoarding role, as defined on the OffBoarding Installation Page, to the person’s user profile.
- Assign a template and create the Activity Guide instance.
- Add or update a trigger on the Manage OffBoarding Event Page.

Note: This page enables HR administrators to access triggers, update the template ID, delete the trigger and OffBoarding process, or add a trigger, if necessary. An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed.

Important! The PeopleSoft system delivers the Event Manger OffBoarding handler (*HR_OFB_EM_HANDLER*) for the *AssignmentTerminated* events as inactivate. If your organization is implementing the OffBoarding feature, you will need to set the status to *Active* for these handlers.
For information on the Event Manager and handlers, see the documentation for *Events and Notifications Framework.*

Related Links

“PeopleSoft Events and Notifications Framework Overview” (Events and Notifications Framework)

“Understanding Event Setup” (Events and Notifications Framework)

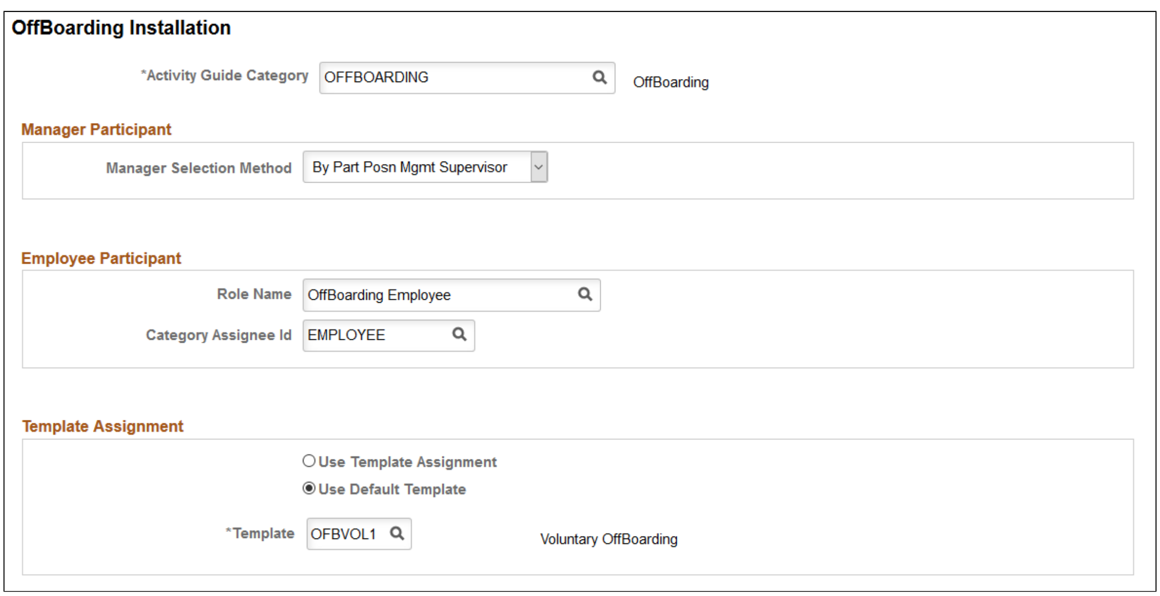
OffBoarding Installation Page

Use the OffBoarding Installation page (HR_OFB_INSTALL) to identify the OffBoarding category, participants, and template assignment settings.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then select OffBoarding, then the OffBoarding Installation page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OffBoarding** > **OffBoarding Installation** > **OffBoarding Installation**

This example illustrates the fields and controls on the OffBoarding Installation page.



Field or Control	Description
Activity Guide Category	Indicate the Activity Guide Composer category that should be used for OffBoarding. Only those templates that use this category will be available when assigning templates to a worker. The PeopleSoft application delivers the *OFFBOARDING* category and the delivered templates are assigned to this category. The category is assigned to a template on the “Activity Guide Composer - General Information Page” (Enterprise Components).

Manager Participant

Field or Control	*Description*
Manager Selection Method	Select the managerial reporting relationship the system should use for OffBoarding transactions if the manager is a participant of the process. Available options for are: • *By Department Manager ID*: Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). • *By Dept Security Tree*: Determines person data access using information from the security tree. • *By Group ID*: Determines data access using the Group ID set up in the group build feature. • *By Part Posn Mgmt Dept Mgr ID*: Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID. • *By Part Posn Mgmt Supervisor*: Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID. • *By Reports To Position*: Defines the reporting relationship based on the position in the Reports To field on the Work Location page. • *By Supervisor ID*: Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page.

Employee Participant

Field or Control	***Description***
Role Name	Enter the OffBoarding role that should be assigned to employees when a termination event trigger is initiated from Job Data. The PeopleSoft application delivers the *OffBoarding Employee* role to access the OffBoarding tile and pages. You can also create and enter your own role to access the OffBoarding pages. The *End User* roles for a template are assigned on the “Activity Guide Composer - Security Page” (Enterprise Components). **Note:** The role name that is assigned to the user profile must match the role that is specified for the *End User* security type on the “Activity Guide Composer - Security Page” (Enterprise Components).
Category Assignee Id	Select from a list of assignee IDs. Valid IDs come from the activity guide category you entered at the top of this page and are defined on the “AG Composer Categories - Assignees Page” (Enterprise Components). The system uses the assignee ID to identify if the employee is a participant so that the OffBoarding role will get automatically assigned during the handler processing.

Template Assignment

Field or Control	***Description***
Use Template Assignment and **Template Assignment**	When you select the **Use Template Assignment** option, the **Template Assignment** field appears. Select this option to indicate that the system should automatically determine the template that should be assigned to a worker using the Template Assignment engine. The system will use the Template Assignment ID you enter here, which defines the rules for automatically assigning templates to workers. For more information on the Template Assignment process, see the “AG Composer Tmplt Asgnmt - Template Assignment Page” (Enterprise Components).

Field or Control	*Description*
Use Default Template and **Template**	When you select the **Use Default Template** option, the **Template** field appears. Select this option to indicate a default template that should be assigned to all workers when an event triggers the process. The PeopleSoft application delivers *OFBINVO* (Involuntary OffBoarding) and **OFBVOL1** (Voluntary OffBoarding) as the default template, but you can add your own templates. For additional information on OffBoarding triggers, see the topic.

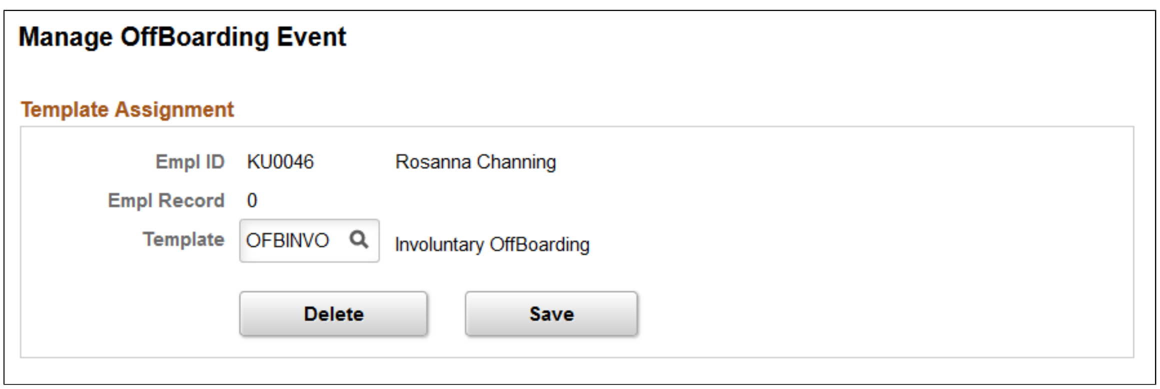
Manage OffBoarding Event Page

Use the Manage OffBoarding Event page (HR_OFB_MNG_EVENT) to add an OffBoarding trigger for a person who is missing a trigger or correct an incorrect template assignment.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then OffBoarding, then select the Manage OffBoarding Event page item tab from the left panel.
- **Set Up HCM** > **Common Definitions** > **OffBoarding** > **Manage OffBoarding Event** > **Manage OffBoarding Event**

This example illustrates the fields and controls on the Manage OffBoarding Event page.



Note: This page enables HR administrators to access OffBoarding trigger rows, update the template ID, delete the trigger, or add a trigger, if necessary. An administrator would not normally access this page except in rare cases to correct invalid template assignments or to add a trigger that got missed. For additional information on OffBoarding triggers, see the Understanding OffBoarding Triggers and Handlers topic.

Field or Control	*Description*
Template	The template value is provided by default from the Template Assignment configuration method selected on the OffBoarding Installation Page. These are: • *Use Template Assignment*: The template is derived and populated based on the option from the Template Assignment engine using the "AG Composer Tmplt Asgnmt - Template Assignment Page" (Enterprise Components). • *Use Default Template*: The value is derived from the **Template** field on the installation page. If necessary, enter or update the template. Select from a list of valid templates associated with the **Activity Guide Category** value defined on the OffBoarding Installation Page. Note that AGC template administrators will use the "Activity Guide Composer - General Information Page" (Enterprise Components) to associate categories to a template. **Note:** You can change the template without warning for a job assignment where the OffBoarding process has not started. However, if you change the template for a job assignment where an OffBoarding process is in progress, the system will issue a warning that an OffBoarding process already exists for this template and the process will be deleted.
Delete	This button is available only if a trigger entry already exists. Click this button to delete an existing trigger. • The system will issue a message asking if you want to delete the OffBoarding trigger for this job assignment. • The system will issue a warning message stating that an OffBoarding process already exists for this template and asks if you want to continue with trigger deletion. **Note:** The system will not prevent you from deleting an in progress trigger. If you delete it, the system will remove the trigger and OffBoarding process. Hence, the worker will no longer be able to access that OffBoarding process for the deleted job assignment row.

Field or Control	Description
Save	Click this button to save the trigger changes and create an activity guide instance. When a new trigger is created, the OffBoarding tile and pages will present the correct OffBoarding process to the participants. **Important!** You will need to create an OffBoarding tile and grant participants access using the "AG Composer Tiles Page" (Enterprise Components) to have the system display the tile. PeopleSoft HCM delivers the *OffBoarding Employee* and *OffBoarding Manager* roles to grant user's access to the OffBoarding information, or you can create your own.

Using the OffBoarding Pages

The OffBoarding feature uses the PeopleSoft Fluid User Interface to provide employees and OffBoarding participants with a comprehensive list of tasks that should be completed as part of the OffBoarding process. OffBoarding takes advantage of existing pages in the system and gives employees and contingent workers access to these pages and tasks from one location instead of accessing several components separately.

This topic discusses pages specific to the OffBoarding process. Information regarding those pages specific to a product or business process are documented elsewhere and are accessible through the links provided here:

- Involuntary OffBoarding Steps: Completing the Involuntary OffBoarding Activity Guide
- Voluntary. OffBoarding Steps: Completing the Voluntary OffBoarding Activity Guide

Pages Used to Access OffBoarding

Page Name	Definition Name	Usage
OffBoarding - Review Activity Guide Page	AGC_REVIEW_AG_FL	Launch the OffBoarding activity guide.

Page Name	***Definition Name***	***Usage***
The Activity Guide Composer Framework for OffBoarding (common elements on pages used to complete OffBoarding tasks)	N/A	The Activity Guide Composer frameworks lets you define OffBoarding templates that can be instantiated to perform steps pointing to OffBoarding specific tasks. Activity guides display application steps in either the left panel or across the top of the page as part of the guided process. A corresponding page to the current step you have selected appears in the main panel. They also provide navigation buttons in the page banner for navigating through the steps.
(Involuntary Template) Acknowledgement of final check receipt Page	HCSC_ESIGN_FL	(Involuntary employee step) Acknowledge that you have received your final pay check.
(Involuntary Template) Acknowledgement of submission of final expenses Page	HCSC_ESIGN_FL	(Involuntary employee step) Acknowledge that you have submitted your final expense report.
(Voluntary Template) Introduction video Page	AGC_VIDEO_FL	(Voluntary employee step) Watch a video to learn how to navigate an activity guide.
(Voluntary Template) Exit Survey Page	EOQF_QSTNR_PRVW_FL	(Voluntary employee step) Complete an exit survey to help the company access your reasons for leaving the organization.
(Voluntary Template) Letter of Resignation Page	HR_OBD_ATT_UPLD_FL	(Voluntary employee step) Upload your letter or resignation.
(Voluntary Template) Acknowledge Final Check Page	HCSC_ESIGN_FL	(Voluntary employee step) Acknowledge that you have submitted your final expense report.
(Manager Only Step) Manager Checklist Page	HR_AG_CHECKLIST_FL	(Involuntary and Voluntary manager step) Indicate the status of tasks that need to be completed prior to an employee's exit from the company.

Page Name	Definition Name	Usage
Checklist Item Comments Page	HR_AG_CHECKLST_SCF	Enter or manage comments or information regarding a checklist item.

Understanding Pages Used to Access the OffBoarding Pages

The PeopleSoft HCM application does not deliver a standard OffBoarding tile but does provide you with various means to access the OffBoarding pages. The system enables:

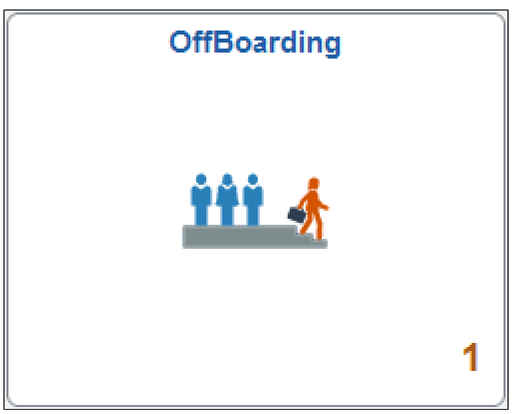
- Administrators the flexibility to create and publish own tiles using the Activity Guide Composer Framework.
- OffBoarding participants to view and manage activity guide processes using the “My Processes Page” (Enterprise Components).
- Participants to access the activity guide via the Notifications links.

For more information on publishing OffBoarding tiles and managing activity guide processes, see the “Deploying and Managing Activity Guide Processes” (Enterprise Components) documentation.

Using an OffBoarding Tile

The “AG Composer Tiles Page” (Enterprise Components) enables administrators to create custom tiles to grant assignees easy access to an activity guide.

This example illustrates a custom tile created using the AG Composer Tiles page.



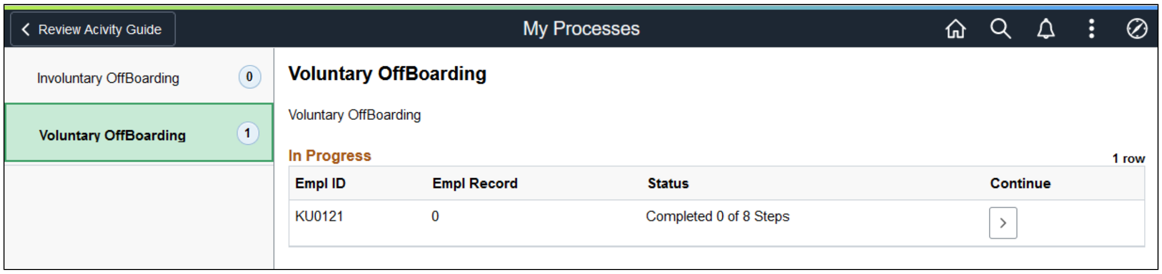
When you select the tile, the system displays the OffBoarding - Review Activity Guide Page, where you can review the status of and access a specific OffBoarding process.

If all the steps are completed, the activity guide process will be complete and the tile number count will reduce by one.

Using the My Processes Page to Access the OffBoarding Pages

Participants can also navigate to **Enterprise Components** > **Activity Guide Composer** > **My Processes** to access the OffBoarding pages.

This example illustrates the fields and controls on the My Processes page.



The My Processes (AGC_MYAG_DETAIL_FL) page functions the same as the OffBoarding - Review Activity Guide Page. View your progression or click the continue arrow (>) button to access this activity guide process instance and view or complete the activity guide.

For more detailed information, see the “My Processes Page” (Enterprise Components) documentation.

Notifications

The Notifications panel alerts participants of OffBoarding tasks that require their attention and provides a link to open the activity guide.

Related Links

“Deploying and Managing Activity Guide Processes” (Enterprise Components)

“<Business Process> - Review Activity Guide Page” (Enterprise Components)

Understanding the Activity Guide Composer Setup Tables for OffBoarding

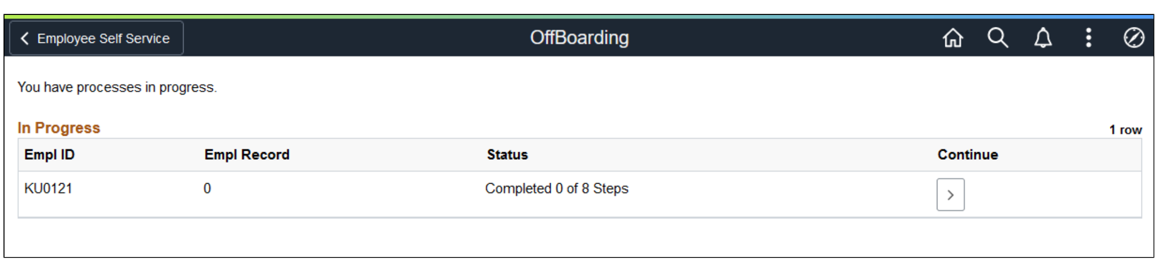
OffBoarding - Review Activity Guide Page

Use the OffBoarding - Review Activity Guide page (AGC_REVIEW_AG_FL) to launch the OffBoarding activity guide.

Navigation:

Access the homepage to which the custom OffBoarding activity guide tile was published, then select the tile.

This example illustrates a sample of the OffBoarding - Review Activity Guide page.



This page enables you to view your in-progress activity guides. The page will display the number of steps you have to complete and how many you have completed (answered the questions or marked the status as complete). It will not show you how many steps other participants will need to complete.

If all the steps are completed, the in-progress activity guide instance will no longer display on this page and the tile count number will be reduced by one.

Click the continue arrow (>) button to access this activity guide process instance and view or complete the activity guide.

Related Links

“Deploying and Managing Activity Guide Processes” (Enterprise Components)

“<Business Process> - Review Activity Guide Page” (Enterprise Components)

Understanding the Activity Guide Composer Setup Tables for OffBoarding

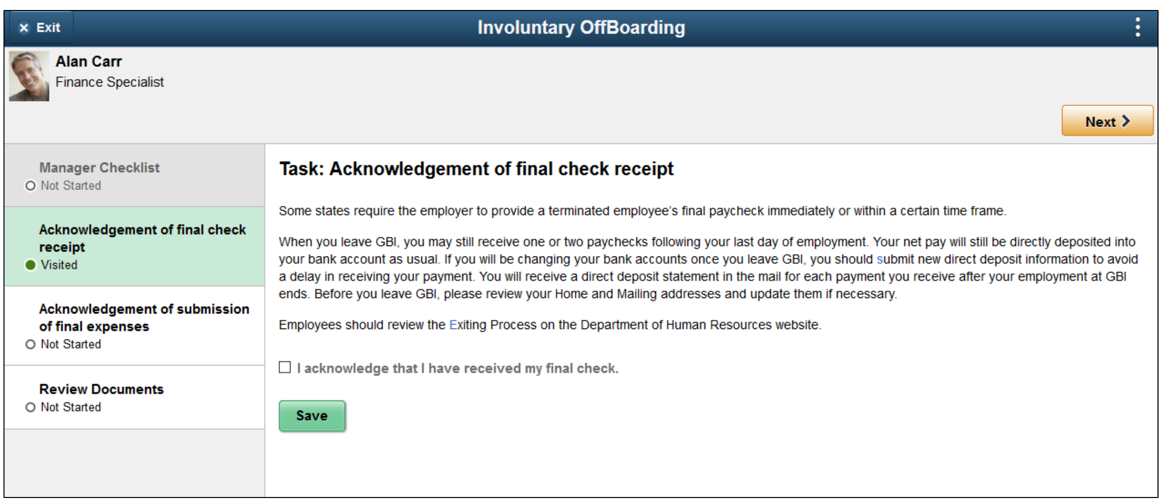
The Activity Guide Composer Framework for OffBoarding

The Activity Guide Composer frameworks lets you define OffBoarding templates that can be instantiated to perform steps pointing to OffBoarding specific tasks.

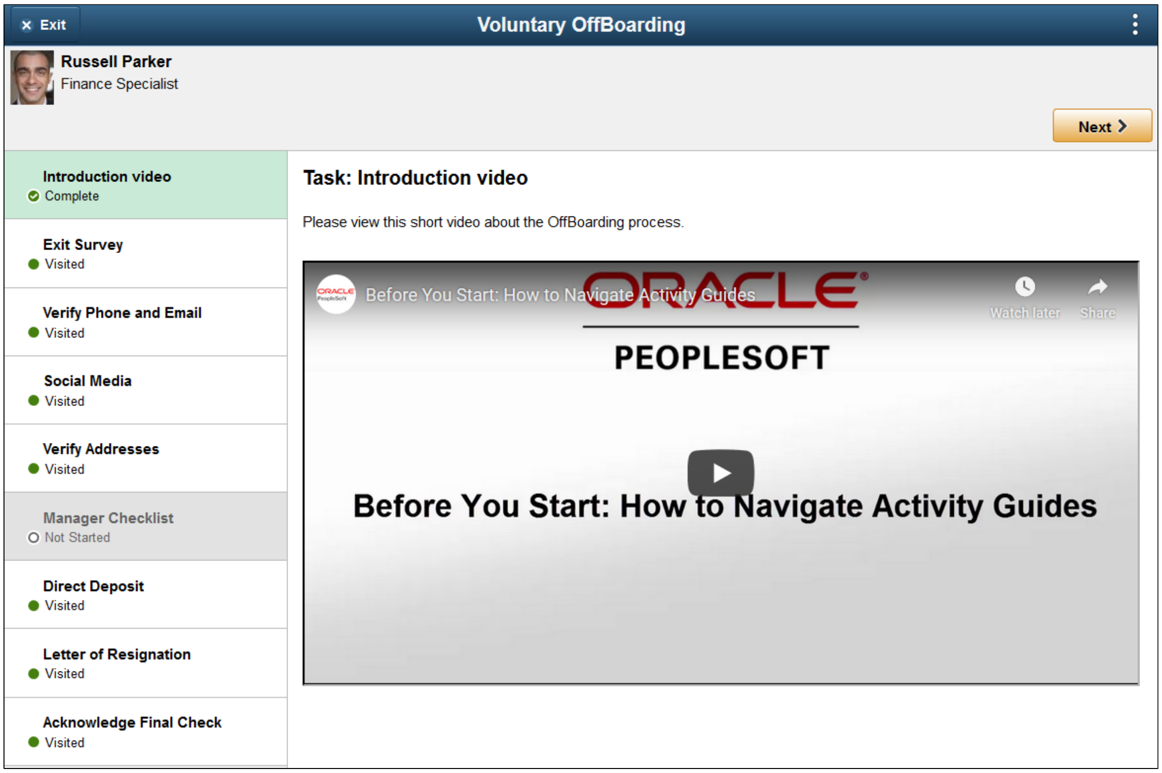
Activity guides display application steps in either the left panel or across the top of the page as part of the guided process. A corresponding page to the current step you have selected appears in the main panel. They also provide navigation buttons in the page banner for navigating through the steps.

To set up templates using the Activity Guide Composer, see the “Understanding the Activity Guide Composer” (Enterprise Components) documentation.

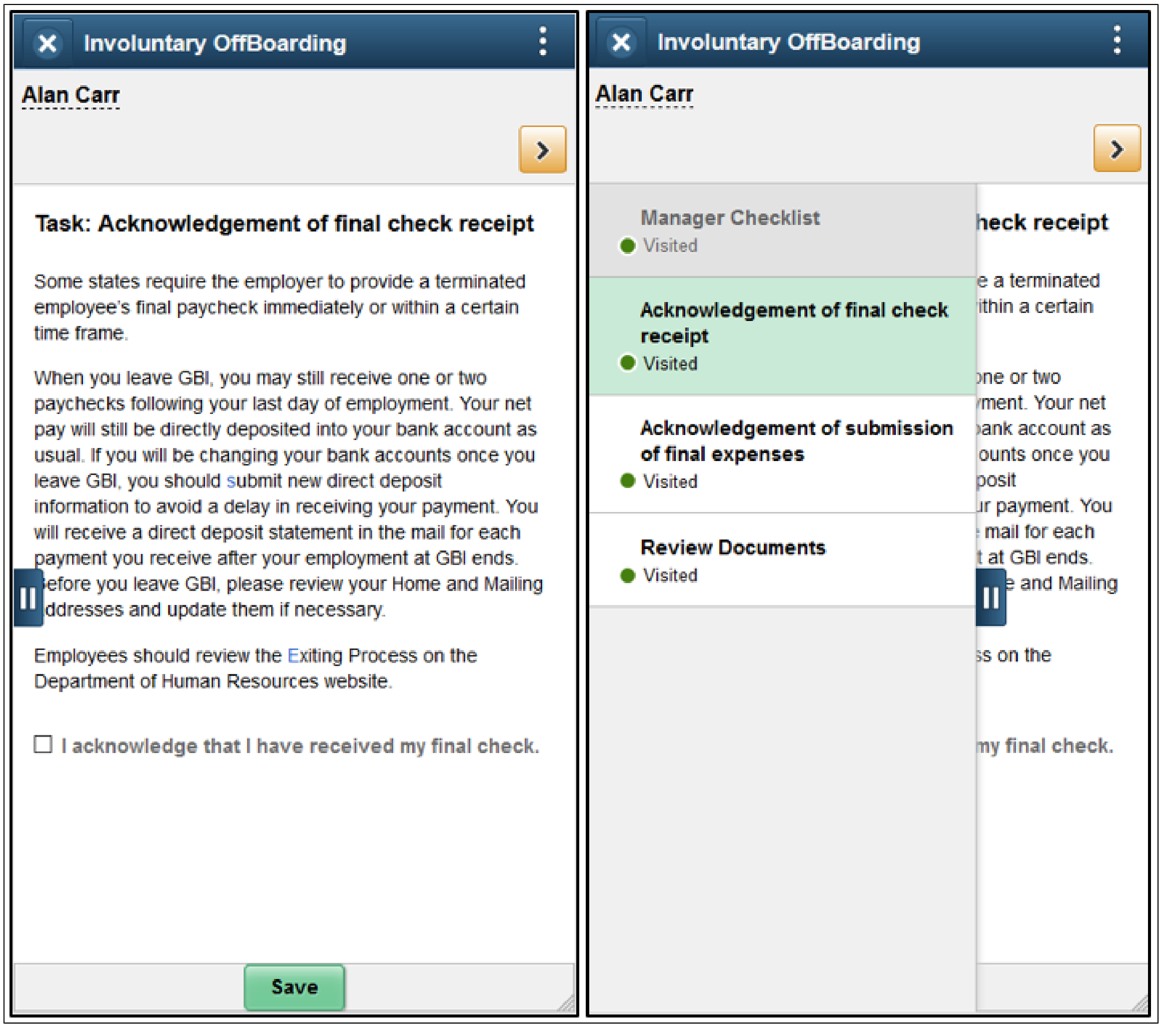
This example illustrates the layout for the Involuntary OffBoarding pages for a large form factor device.



This example illustrates the layout for the Voluntary OffBoarding pages for a large form factor device.



This example illustrates the layout of the OffBoarding pages on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Note: Throughout this topic, the page illustrations show the page sections of the OffBoarding process without the context of the activity guide steps. Even though the framework is not illustrated, remember that all steps appear within that framework.

Page Banner

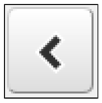
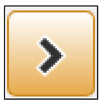
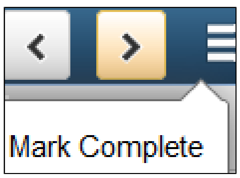
The top of PeopleSoft pages is called the page banner and it displays the name of the template. The PeopleSoft application delivers the *Involuntary OffBoarding* and *Voluntary OffBoarding* templates.

In PeopleSoft applications, the banner displays several standard icon buttons.

Field or Control	***Description***
 or  Exit button	Click this button to exit the activity guide. If all your steps are not marked a *Complete* before exiting, you can resume the activity guide data entry at a later time.

Header (Sub-Banner)

A gray area under the main page banner displays contextual information that is specific to the activity guide, including the person's name and action buttons.

Field or Control	Description
 or  Previous button	Click this button to navigate to the previous step. The button is not visible on the first step in the request.
 or  Next button	Click this button to navigate to the next step. On the last step of the request, the **Next** button does not appear.
 **Mark Complete** menu item from the Actions Menu list (Prior PeopleTools 8.57) or  **Mark Complete** button (PeopleTools 8.57 or higher)	Select the **Mark Complete** menu item (prior to PeopleTools 8.57) or button in the sub banner (PeopleTools 8.57 or higher) to change the status of a step. See the Step List Format section that follows for more information on step statuses. **Important!** To complete your steps and finish all your tasks in the activity guide, each step needs to have a status of *Complete*. Pages that have questions, surveys, or checklist will *not* have the **Mark Complete** button. This page will be set to a *Complete* status upon answering all the questions and saving the page. For the (Manager Only Step) Manager Checklist Page you must mark all checklist items as *Completed* and then save the page to mark the step as complete.

Step List Format

The delivered OffBoarding templates are set up using the *Vertical Non Sequential* activity guide type. Therefore, this topic will discuss the layout of the delivered templates.

The delivered activity guide type templates include a left panel that lists the steps in the OffBoarding process. This panel appears on the left of larger devices. On a small form factor such as phone, the panel is initially hidden. Click the Item/Sub-Item Section tab to expand and view the steps and navigate to other step pages.

Note: Gray steps belong to other participants of the activity guide and are not available for selection.

Field or Control	***Description***
<Step or Substep Name>	The left panel has individual steps that are labeled. The delivered OffBoarding templates do not require a sequential order to completing steps. You can configure you template to include substeps. Steps with substeps are indicated by an expand/collapse icon before to the step name. The step is automatically expanded when you reach it. You can also click the parent step at any time to expand or collapse it. The page will highlight the current step or substep. **Note:** For a list of delivered OffBoarding steps, see the Working with OffBoarding Categories, Completing the Involuntary OffBoarding Activity Guide, and Completing the Standard OnBoarding Activity Guide topics.
<Step Status>	Each step has a status. These statuses include: • *Not Started*: These are unvisited steps. • *Visited*: When you first reach a step, the status changes to this. • *Complete*: To mark a step complete, click the Actions Menu icon in the banner and select the *Mark Complete* action item (prior to PeopleTools 8.57) or click the **Mark Complete** button in the sub banner (PeopleTools 8.57 or higher). **Important!** All steps must show a status of *Complete* to close out your portion of the activity guide and have it removed from your activity guide review board (see OffBoarding - Review Activity Guide Page). In some instances, you will need to answer questions or set all checklist items to *Completed* and save the page in order for the step status to change to *Complete*. Users can return to steps by clicking the step or using the navigation buttons in the banner.

For more information on how to display steps and selecting and organizing steps, see the “Activity Guide Composer - Activity Guide Type Page” (Enterprise Components), “Activity Guide Composer - Select Steps Page” (Enterprise Components), and “Activity Guide Composer - Organize and Configure Steps Page” (Enterprise Components).

<Transaction Name> Pages

During activity guide execution, the right or main panel displays the page for the current step in the transaction.

Field or Control	*Description*
<Title Text>	Displays a page title that includes the step name.

Saving a Step

Field or Control	*Description*
Save button	This button, or one similar to it, will appear on the survey, question, and checklist pages. Click this button to save your data and mark the OffBoarding activity guide step with a *Complete* status. **Important!** To finish all your tasks and close out your portion of the activity guide, each step should have a status of *Complete*. Pages that have questions, surveys, or checklists will *not* have the **Mark Complete** button. These pages will be set to a *Complete* status upon answering all the questions and saving the page. For the (Manager Only Step) Manager Checklist Page you must mark all checklist items as *Completed* and then save the page to have the step status set to *Complete*.

(Involuntary Template) Acknowledgement of final check receipt Page

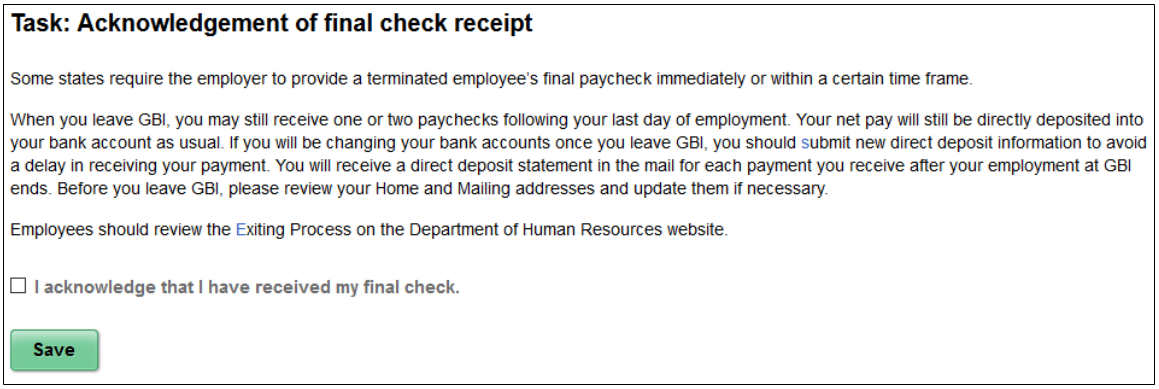
Use the Acknowledgement of final check receipt page (HCSC_ESIGN_FL) to acknowledge that you have received your final pay check.

Note: This is an employee step delivered with the Involuntary OffBoarding template.

Navigation:

From the *Involuntary OffBoarding* activity guide, click the Acknowledgement of final check receipt step from the activity guide navigation, or use the **Next** or **Previous** button, as needed.

This example illustrates the Acknowledgement of final check receipt page.



Select the check box to indicate that you have received your final check and click **Save** to mark the step a complete.

(Involuntary Template) Acknowledgement of submission of final expenses Page

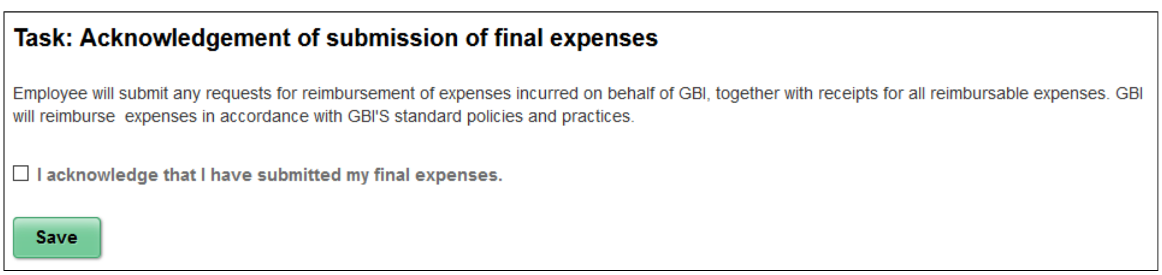
Use the Acknowledgement of submission of final expenses page (HCSC_ESIGN_FL) to acknowledge that you have submitted your final expense report.

Note: This is an employee step delivered with the Involuntary OffBoarding template.

Navigation:

From the *Involuntary OffBoarding* activity guide, click the Letter of Resignation step from the activity guide navigation, or use the **Next** or **Previous** button, as needed.

This example illustrates the Acknowledgement of submission of final expenses page.



Select the check box to indicate that you have submitted your final expenses and click **Save** to mark the step a complete.

(Voluntary Template) Introduction video Page

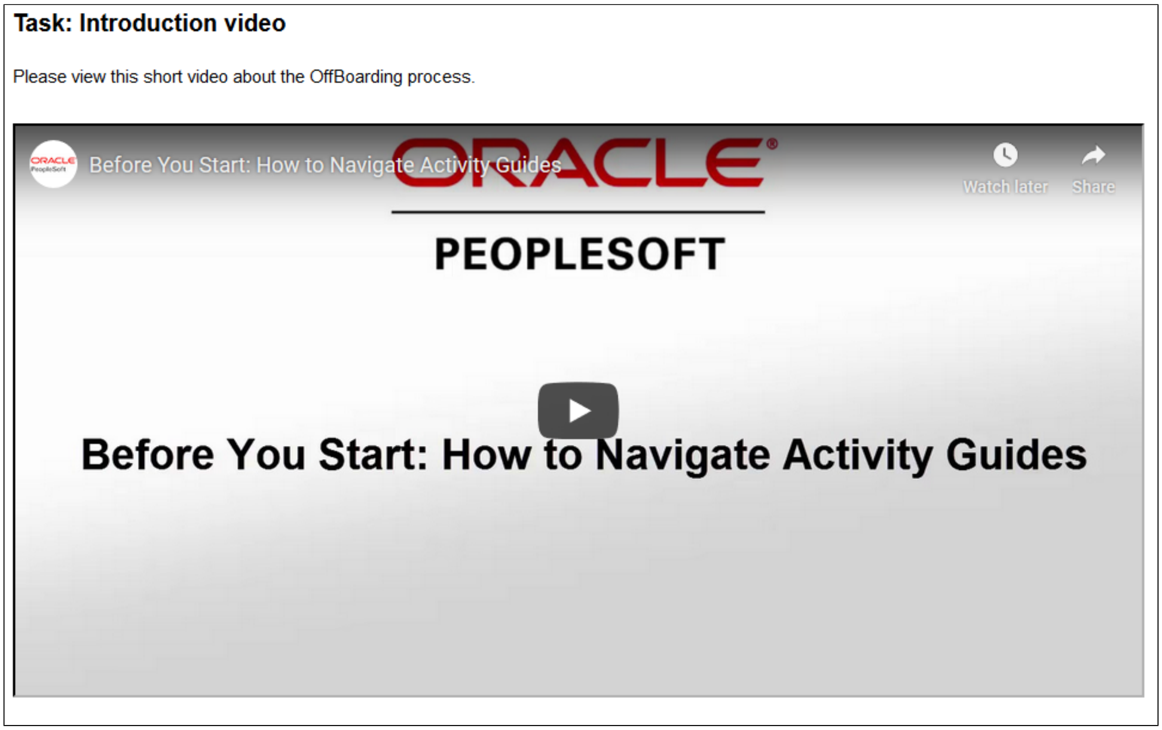
Use the Introduction video page (AGC_VIDEO_FL) to watch a video to learn how to navigate an activity guide.

Note: This is an employee step delivered with the Voluntary OffBoarding template.

Navigation:

- Access the activity guide via an email or notification link, or click the OffBoarding tile, if provided.
- From the *Voluntary OffBoarding* activity guide, click the Introduction video step from the activity guide navigation, or use the **Previous** button, as needed.

This example illustrates the Introduction video page.



Use this page to watch a video of how to navigate activity guides.

(Voluntary Template) Exit Survey Page

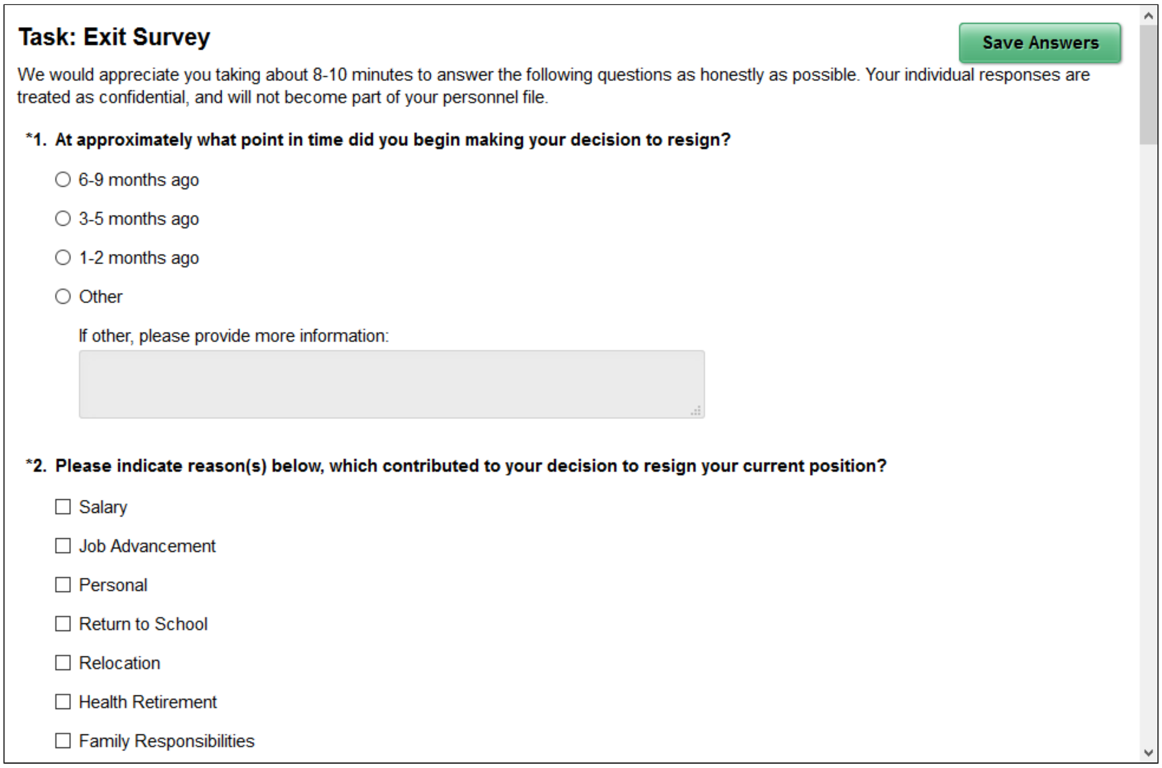
Use the Exit Survey page (EOQF_QSTNR_PRVW_FL) to complete an exit survey to help the company access your reasons for leaving the organization.

Note: This is an employee step delivered with the Voluntary OffBoarding template.

Navigation:

From the *Voluntary OffBoarding* activity guide, click the Exit Survey step from the activity guide navigation, or use the **Next** or **Previous** button, as needed.

This example illustrates the Exit Survey page.



Answer the survey and click the **Save Answers** button to mark the step a complete.

Surveys are set up using the Questionnaire framework. For more information on this, see “Understanding Questionnaire Framework” (Enterprise Components).

(Voluntary Template) Letter of Resignation Page

Use the Letter of Resignation page (HR_OBD_ATT_UPLD_FL) to upload your letter or resignation.

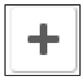
Note: This is an employee step delivered with the Voluntary OffBoarding template.

Navigation:

From the *Voluntary OffBoarding* activity guide, click the Letter of Resignation step from the activity guide navigation, or use the **Next** or **Previous** button, as needed.

This example illustrates the Letter of Resignation page.

Use this page to upload a resignation letter as an attachments.

Field or Control	***Description***
Add Attachment or 	Click this button to access the File Attachment page and upload files.
Attachments and **Description**	Select the link to download and view the attachment. Enter can enter a description for the attachment.
Delete button	Click this button to remove an attachment from this page.

Administrators will access the uploaded files on the Employee Documents Page.

(Voluntary Template) Acknowledge Final Check Page

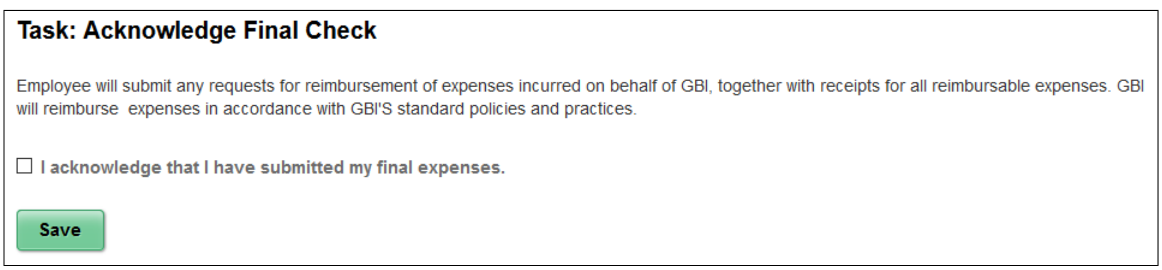
Use the Acknowledge Final Check page (HCSC_ESIGN_FL) to acknowledge that you have submitted your final expense report.

Note: This is an employee step delivered with the Voluntary OffBoarding template.

Navigation:

From the *Voluntary OffBoarding* activity guide, click the Acknowledge Final Check step from the activity guide navigation, or use the **Next** button.

This example illustrates the Acknowledge Final Check page.



Select the check box to indicate that you have submitted your final expenses and click **Save** to mark the step a complete.

(Manager Only Step) Manager Checklist Page

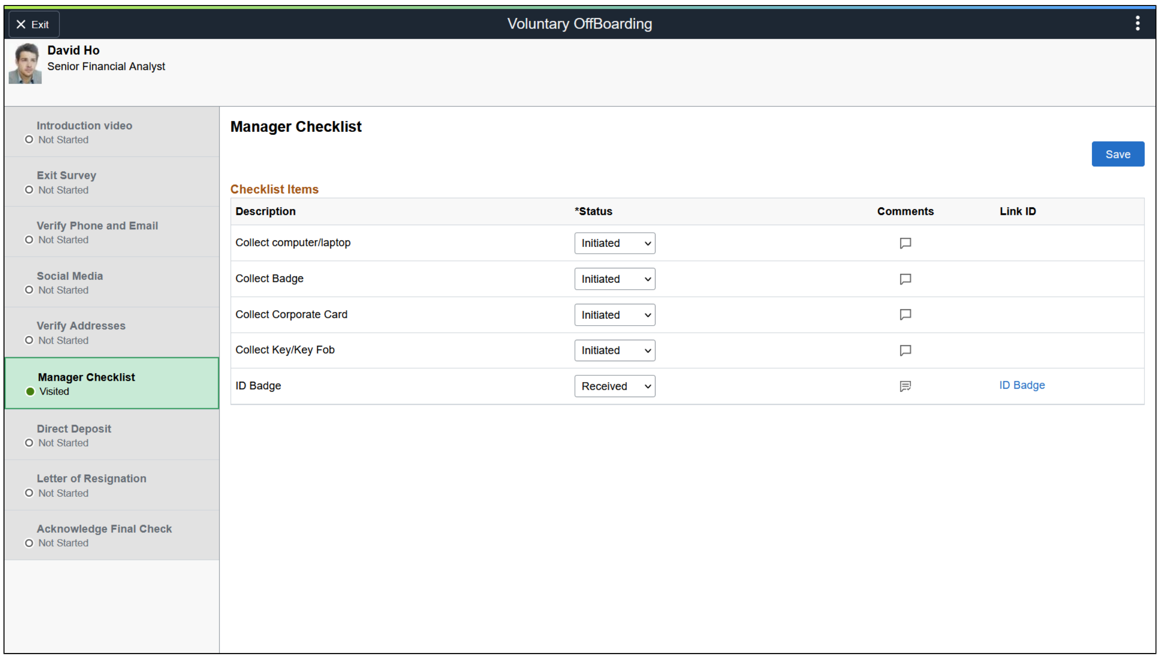
Use the Manager Checklist page (HR_AG_CHECKLIST_FL) to indicate the status of tasks that need to be completed prior to an employee's exit from the company.

Note: This is a manager step delivered with the *Involuntary OffBoarding* and *Voluntary OffBoarding* templates, which use the *(Fluid) Fluid Manager Voluntary Termination checklist* (MGR_VCHKLIST_FL) step.

Navigation:

- As a manager, access the homepage to which the custom OffBoarding activity guide tile was published, then select the tile.
- Navigate to **Enterprise Components** > **Activity Guide Composer** > **My Processes**, select the appropriate template and activity guide.
- Select the OffBoarding notification link.

This example illustrates the Fluid Manager Checklist page.



Field or Control	***Description***
Status	Indicate the status of this checklist item. Options include: • *Completed* • *Initiated* • *Notified* • *Received* **Important!** You must mark all checklist items as *Completed* and then save the page to set the step status to *Complete*.
Comments (empty Comments icon) or (populated Comments icon)	Select this icon to access the Checklist Item Comments Page to enter or manage additional information about an item. The callout image icon will appear blank when no comments are available and with lines in the callout when comments are present.

Field or Control	***Description***
Link ID	This column displays a link to view additional information about an item, when configured as such. If no links are active, then this column is hidden. Select the link to open the corresponding page in a new browser window to review and manage badge data. **Note:** If the user does not have access to the component tied to the link, then the link does not appear.

For more information on creating checklists, see Creating Checklists.

Administrators can view a person's checklist using the Person Assignment Checklist Page. Note that administrator's can use this page to add to, modify, or delete a manager's comments.

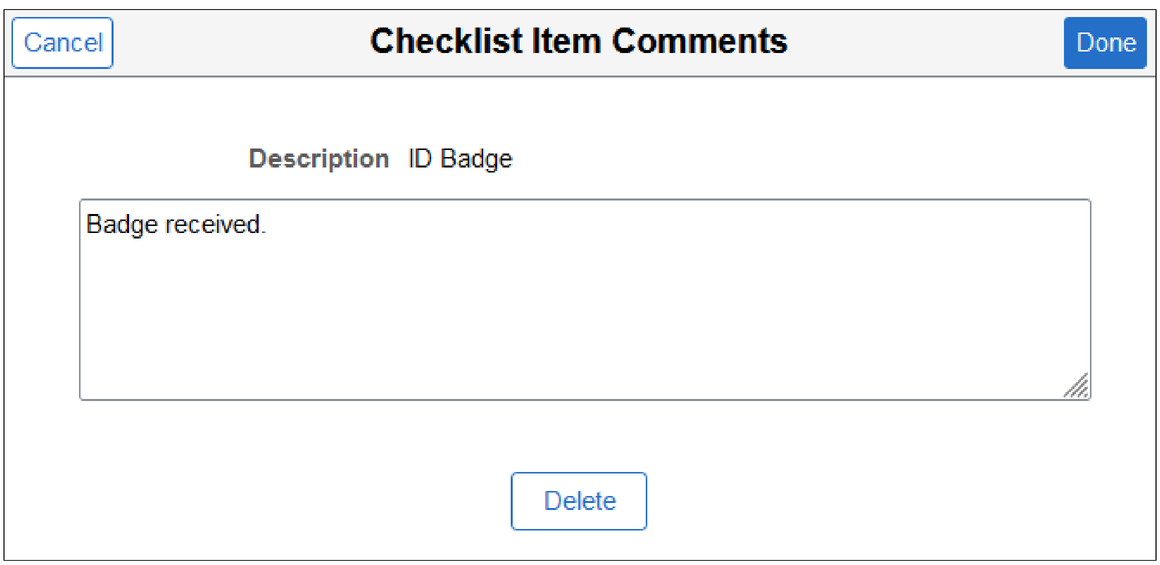
Checklist Item Comments Page

Use the Checklist Item Comments page (HR_AG_CHECKLST_SCF) to enter or manage comments or information regarding a checklist item.

Navigation:

Select the **Comments** icon from the (Manager Only Step) Manager Checklist Page.

This example illustrates the Comments page.



Completing the Involuntary OffBoarding Activity Guide

Participants complete the OffBoarding event process by navigating to the OffBoarding activity guide. This may be through an notification or email link, or through accessing your companies OffBoarding tile created by your administrator.

After participants access the OffBoarding activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the participants through the OffBoarding process. These steps are specific to the delivered *OFBINVO* Involuntary OffBoarding template.

This topic lists the pages that come with the delivered *Involuntary OffBoarding* (OFBINVO) template.

Pages Used to Complete the Involuntary OffBoarding Activity Guide

Page Name	***Definition Name***	***Usage***
(Manager Only Step) Manager Checklist Page	HR_AG_CHECKLIST_FL	(Manager step) Indicate the status of tasks that need to be completed prior to an employee's exit from the company.
(Voluntary Template) Acknowledge Final Check Page	HCSC_ESIGN_FL	(Employee step) Acknowledge that you have received your final pay check.
(Involuntary Template) Acknowledgement of submission of final expenses Page	HCSC_ESIGN_FL	(Employee step) Acknowledge that you have submitted your final expense report.
Review Documents Page (see Documents Page)	HR_OBD_ATT_DNLD_FL	(Employee step) View, acknowledge, or upload documents provided by the organization. **Note:** Administrators will access the uploaded files on the Employee Documents Page.

Note: You need to answer all survey questions and mark all steps as complete to close your portion of the OffBoarding activity guide process. When you have done this, the activity guide will be removed from your OffBoarding review page and the tile count will be reduced if an OffBoarding tile was used.

Completing the Voluntary OffBoarding Activity Guide

Participants complete the OffBoarding event process by navigating to the OffBoarding activity guide. This may be through an notification or email link, or through accessing your companies OffBoarding tile created by your administrator.

After participants access the OffBoarding activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the participants through the OffBoarding process. These steps are specific to the delivered *OFBVOL1* Voluntary OffBoarding template.

This topic lists the pages that come with the delivered *Voluntary OffBoarding* (OFBVOL1) template.

Pages Used to Complete the Voluntary OffBoarding Activity Guide

Page Name	***Definition Name***	***Usage***
(Voluntary Template) Introduction video Page	AGC_VIDEO_FL	(Employee step) Watch a video to learn how to navigate an activity guide.
(Voluntary Template) Exit Survey Page	EOQF_QSTNR_PRVW_FL	(Employee step) Complete an exit survey to help the company access your reasons for leaving the organization.
Verify Phone and Email Page (see “Contact Details Page” (PeopleSoft eProfile))	HR_EE_CONTACTS_FL	(Employee step) Review or enter your phone numbers, email addresses, and instant messaging IDs.
“Social Media (Summary) Page” (PeopleSoft eProfile)	HR_EE_SOC_MEDIA_FL	(Employee step) Review your social media accounts.
Verify Addresses Page (see “Addresses (Summary) Page” (PeopleSoft eProfile))	HR_EE_ADDR_FL	(Employee step) Verify your home and mailing address and make updates, as needed.
(Manager Only Step) Manager Checklist Page	HR_AG_CHECKLIST_FL	(Manager step) Indicate the status of tasks that need to be completed prior to an employee’s exit from the company.
Direct Deposit Page (see “Direct Deposit Page” (PeopleSoft ePay))	PY_IC_DIR_DEP_FL	(Employee step) Review or enter direct deposit information using the classic pages.
(Voluntary Template) Letter of Resignation Page	HR_OBD_ATT_UPLD_FL	(Employee step) Upload your letter or resignation. **Note:** Administrators will access the uploaded files on the Employee Documents Page.
(Voluntary Template) Acknowledge Final Check Page	HCSC_ESIGN_FL	(Employee step) Acknowledge that you have submitted your final expense report.

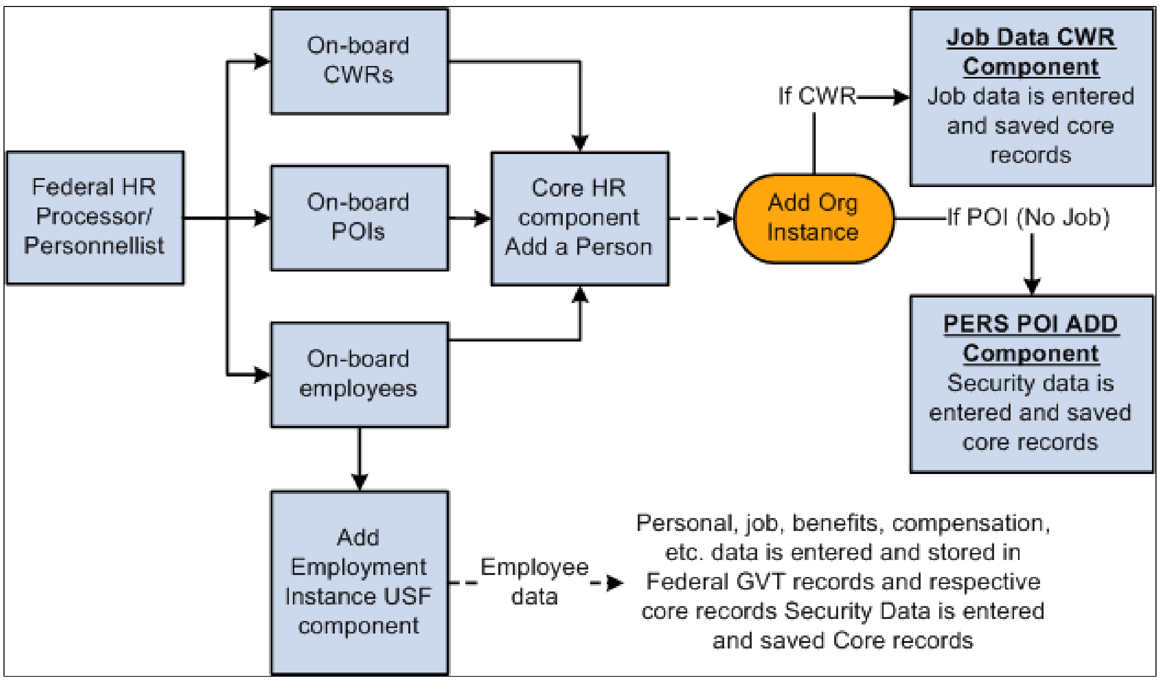
Note: You need to answer all survey questions and mark all steps as complete to close your portion of the OffBoarding activity guide process. When you have done this, the activity guide will be removed from your OffBoarding review page and the tile count will be reduced if an OffBoarding tile was used.

Chapter 13

(USF) Adding an Employment Instance

Understanding U.S. Federal Hiring

This diagram shows the process for hiring U.S. federal government employees, including hiring an existing person of interest (POI) or contingent worker (CWR) or creating additional appointments for existing federal employees:



Use the Add Employment Instance USF component to enter federal employment data for hiring an existing person of interest (POI) or contingent worker (CWR) as a federal employee. You also use this component to create additional appointments for existing federal employees.

See (Classic) Adding a Person.

The pages that are included in the PAR process store specific information and contain links to supplemental pages that provide further details. The following table lists four components:

Component	***Navigation Path***	***When to Use***
Add Employment Instance USF	Workforce Administration, Job Information, Add Employment Instance USF	To create a federal employment instance using an existing person of interest (POI) or contingent worker (CWR) data. If a person is already an existing employee, this component will increment the employment record number to accommodate the new federal job.
Supervisor Request	Workforce Administration, Job Information, Supervisor Request USF	See Tracking and Routing a PAR Through Reviews and Completion. See "Understanding Self-Service Transactions and Approvals" (PeopleSoft eProfile Manager Desktop).
Cancel Personnel Action	Workforce Administration, Job Information, Cancel Personnel Action USF	See Canceling or Correcting a Personnel Action Request. This component is used when a cancellation (NOA 001) personnel action is necessary.
Correct Personnel Action	Workforce Administration, Job Information, Correct Personnel Action USF	See Canceling or Correcting a Personnel Action Request. This component is used when a correction (NOA 002) personnel action is necessary.

Enter personal information, employment information, job data, compensation, job earnings distribution information, and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

Related Links

Understanding the Administering PAR System

Using Smart HR Templates and Transactions

Common Elements Used When Adding a U.S. Federal Employment Instance

Field or Control	***Description***
Transaction Nbr and **Sequence**	Set by default to *1/1*—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day. This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is *1/2 (1* is the transaction number for this particular action for this employee on this day and *2* is the sequence number for any correction of this action for this employee on this day).
PAR Status (Personnel Action Request status)	References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *PRO* (Processed by HR). If you choose to save with this (PRO) status, the personnel action information is saved and applied as its "finalized" state. The value that remains after you leave this page is the displayed status on other pages within the component.
NOA Code (nature of action code)	The Federal numerical code that applies to this personnel action.
OK	Click to close this page.

Adding an Employment Instance

These topics provide an overview of and discuss adding an employment instance.

Pages Used to Add an Employment Instance

Page Name	***Definition Name***	***Usage***
Add Employment Instance USF Page	FEDERAL_EMP_ADD	This component uses existing data from a person of interest or contingent worker in the new federal employment instance.

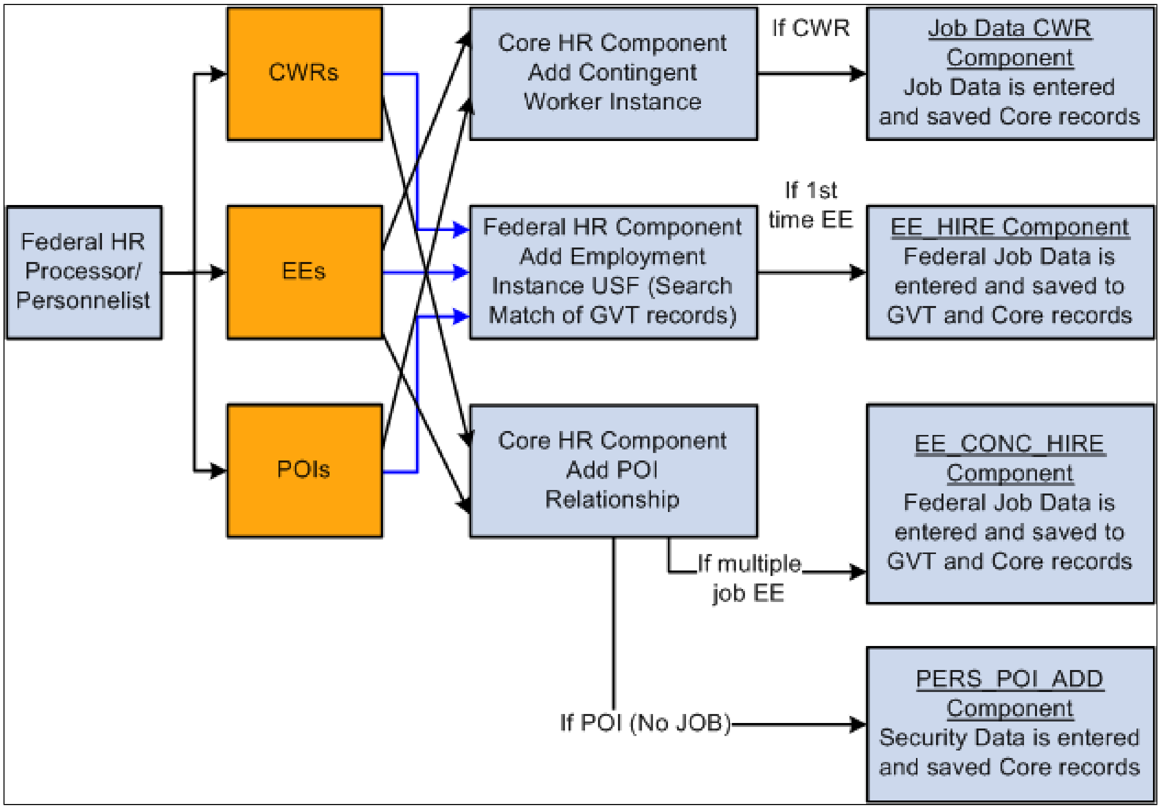
Page Name	***Definition Name***	***Usage***
Add Employment Instance USF - Data Control Page	GVT_JOB0	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.
PAR Remarks Page	GVT_PAR_PROCESS_RK	Enter or look up comments specific to this position or employee situation.
Award Data Page	GVT_AWD_DATA	Assign an award to a federal employee and enter award, informational, and payroll details.
Job Tracking Information Page	GVT_EE_CNTRL_SEC	View or enter job-tracking information.
Personal Data Page	GVT_PERS_DATA1	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap. The Personal Data page does not appear when you are entering an additional assignment for a federal employee.
Additional Birth Information Page	GVT_BRTHINF_SEC	Enter birth information.
Address Information Page	GVT_ADDRINF_SEC	Enter home and mailing address information.
Personal Phone Numbers Page	GVT_PERS_PH_SEC	Enter employee phone, fax, cellular, and other numbers.
Veterans Info Page	GVT_VETINF_SEC	Enter veteran information.
Marital Status Page	GVT_MARITAL_SEC	Enter marital information.
Add Employment Instance USF - Job Data Page	GVT_JOB1	Enter job information, including the employee's position, agency, and department.
Benefits/FEHB Data Page (Benefits / Federal Employees Health Benefits Data)	GVT_BENDATA_SEC	Specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Page Name	***Definition Name***	***Usage***
FEGLI/Retirement/FICA Page (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Enter life insurance and retirement data.
Departmental Hierarchy Page	GVT_DEPTINF_SEC	View departmental hierarchy for the individual's position.
Detail Assignment page	GVT_DETAIL_SEC	Track information for employees on a detail assignment. You probably won't use this page when first hiring an employee.
Federal NFC Page Page	GVT_NFC_JOB_SEC	Track required National Finance Center (NFC) information for employees. Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.
Add Employment Instance USF - Position Data Page	GVT_JOB2	Enter position information like employee type, classification, appointment type, work schedule, and pay group.
Add Employment Instance USF - Compensation Data page	GVT_JOB3	Enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay. You can also enter retained pay plan/table/grade and step on this page.
Other Pay Information Page	GVT_OTH_PAY_SEC	Enter compensation that employees receive that's in addition to base pay.
Expected Pay Page	GVT_LOC_PAY_SEC	View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.
Accounting Information Page	GVT_JOBDIST_SEC	View a summary of the employee's job earnings distribution.
Employment Data 1 Page	GVT_EMPLOYMENT1	Enter employment information, such as employee service computation and conversion dates, and within-grade-increase data.

Page Name	***Definition Name***	***Usage***
Expiration Dates Page	GVT_EXPIRDT_SEC	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Info Page	GVT_APPDATA_SEC	Enter appointment limits and indicate if this person is in a special employment program.
Employment Data 2 Page	GVT_EMPLOYMENT3	Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade information.
Federal Probation Dates Page	GVT_EMPL_PROB_SEC	Document any probation start and end dates that apply to this person.
Non - Pay Data Page	GVT_NONPAY_SEC	Track information related to a status of nonpay. Information on this page affects FEHB eligibility and FEGLI.
Financial Disclosure Page	GVT_SECURTY_SEC	Indicate if financial disclosure is required and the due date.
Time and Labor Data Page	TL_EMPL_DATA_FG_S	Review PeopleSoft Time and Labor data for this employee.
CI Exceptions Page	GVT_PAR_CI_MSG	Warning messages generated during the hire process are displayed on the CI Exceptions page after the transaction has been successfully saved.

Understanding Adding an Employment Instance

The following diagram shows the process flow of hiring an employee and shows the components that are used for hiring employees, contingent workers, and persons of interest:



Use the Core HR component "Add a Person" as a common starting point for initially entering contingent workers and persons of interest. If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

Before you can add multiple jobs for your workforce, you must:

- Select the **Multiple Jobs Allowed** check box in PeopleTools.
- Update user security so that users have access to the menu options they'll need.

Related Links

(Classic) Adding a Person

“Understanding Group Build” (Application Fundamentals)

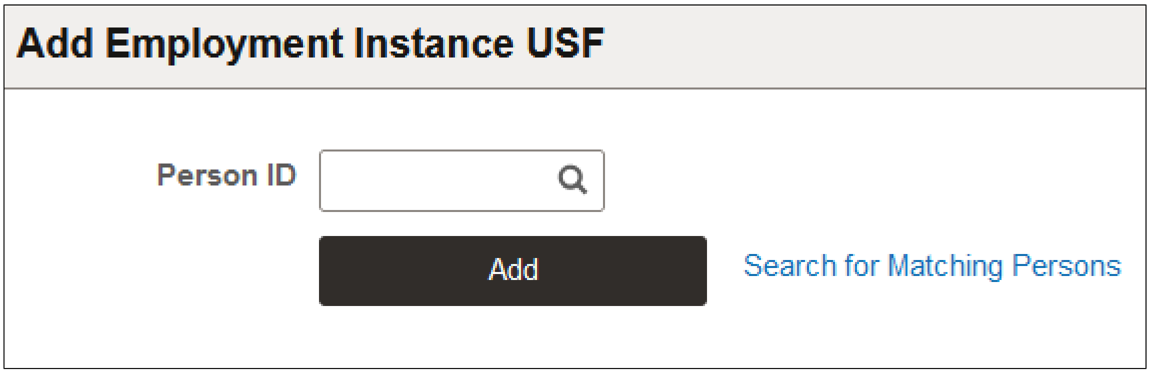
Add Employment Instance USF Page

Use the Add Employment Instance USF page (FEDERAL_EMP_ADD) to use existing data from a person of interest or contingent worker in the new federal employment instance.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF**

This example illustrates the fields and controls on the Add Employment Instance USF page. You can find definitions for the fields and controls later on this page.



Use this component if you have already entered information about a person, for example, in the Add a Person component.

Enter a **Person ID** and click **Add** to create a federal employment instance for a person of interest or to create a concurrent job for an existing federal employee.

See “Working with Search/Match” (Application Fundamentals).

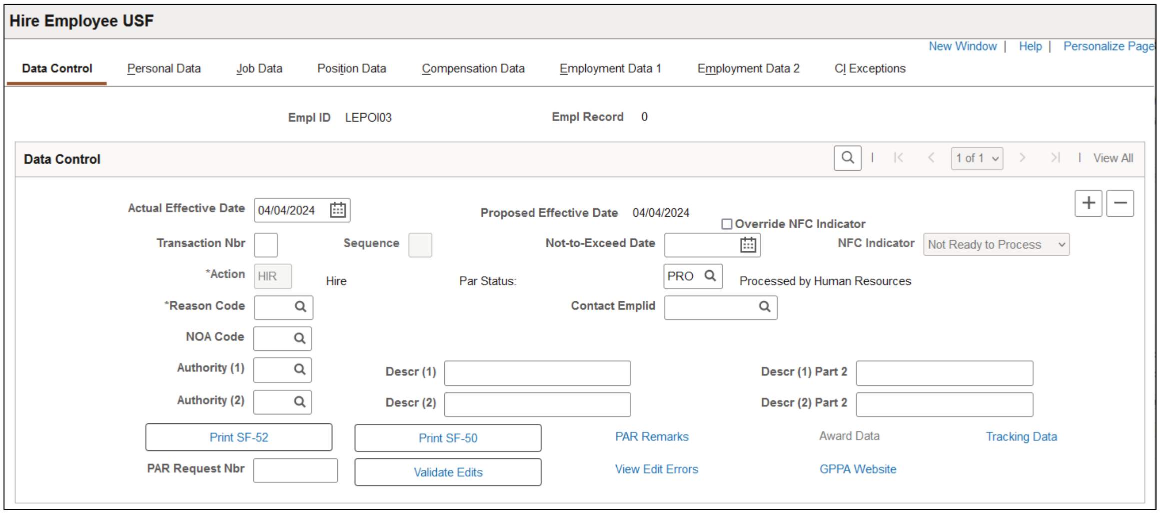
Add Employment Instance USF - Data Control Page

Use the Data Control page (GVT_JOB0) to enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.

Navigation:

Enter a valid Person ID and click **Add** on the Add Employment Instance USF page.

This example illustrates the fields and controls on the Data Control page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Actual Effective Date	Enter the actual effective date, which is used as the default effective date of the action throughout the system. If necessary, change this to reflect the effective date of the new employment instance. When working on other pages, these dates are unavailable, so if you need to change the effective date, return to the Data Control page.
Proposed Effective Date	This field is populated by default with the date that is entered in the **Actual Effective Date** field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.
Transaction Number and **Sequence**	Set by default to 1/1—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day. This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is 1/2 (1 is the transaction number for this particular action for this employee on this day and 2 is the sequence number for any correction of this action for this employee on this day).
Not to Exceed Date	(Optional) Enter the ending date of a temporary action (for example, the date a temporary job expires).

Field or Control	*Description*
Action	The default value for this field depends on whether the employment instance is for a new employee or is based on existing data for a current employee, person of interest, or contingent worker.
PAR Status (personnel action request status)	References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *PRO* (Processed by HR). If you choose to save with this *(PRO)* status, the personnel action information is saved and applied as its "finalized" state. The value that remains after you leave this page is the displayed status on other pages within the component.
Reason Code	A default reason code may display in this field. Otherwise, enter the reason code for this employment instance, such as new position, temporary assignment, or trainee. **Note:** For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers into your agency from another agency, the action is *Hire* and the reason is *Transfer From* (another agency). When an employee transfers out of your agency to another agency, the action is *Terminate* and the reason is *Transfer To* (another agency).
Contact Emplid (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the hire.
NOA Code (nature of action code)	Select the federal numerical code defined to identify the nature of action that is occurring, such as an appointment or promotion. Nature of action codes are used for statistical and data processing purposes, such as Standard Form 52 or Standard Form 50, and are defined on the "Nature of Actions USF Page" (Application Fundamentals). See this page for more information on using and maintaining NOA codes.
Authority (1), Authority (2), Descr (1), Descr (2), Descr (1) Part 2, and **Descr (2) Part 2**	Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.
Print SF-52 and **Print SF-50**	Select these buttons to print the Notice of Personnel Action USF or Request Personnel Action USF action request. For more information, see the Notice of Personnel Action USF or Request Personnel Action USF - Parameters Page.
PAR Remarks	Click to view or enter comments specific to this position or employee situation.

Field or Control	*Description*
Award Data	This link is active only for award and bonus personnel actions. See Award Data Page.
Tracking Data	Click this link to view or enter job-tracking information.
PAR Request Nbr (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
Validate Edits	Click this button to initiate online regulatory edits for this PAR row. Edits should be triggered after all hire information is entered. **Note:** Validation is an optional step. Depending on the state of the transaction, all edits may not run to completion because all data may not have been captured up to that point.
View Edit Errors	Click this link to view regulatory edit errors resulting from the validation process. Correct any errors and validate the transaction again.
GPPA Website	Click this link to open the Personnel Documentation page of the Office of Personnel Management website (http://www.opm.gov/feddata/gppa/gppa.asp).

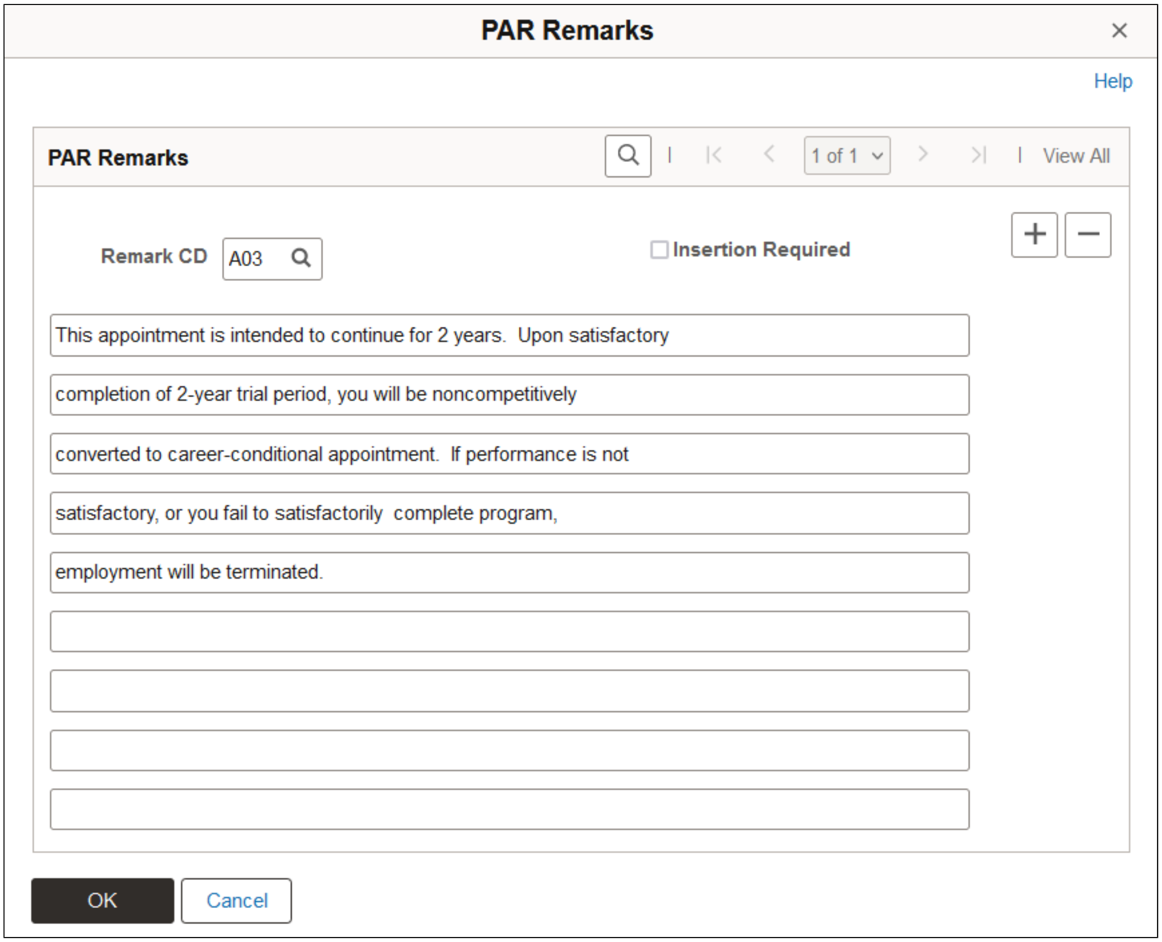
PAR Remarks Page

Use the PAR Remarks page (GVT_PAR_PROCESS_RK) to enter or look up comments specific to this position or employee situation.

Navigation:

Click **PAR Remarks** link on the Data Control page.

This example illustrates the fields and controls on the PAR Remarks page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Remark CD (remark code)	Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.
Insertion Required	If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page.

See “Setting Up Federal HCM Control Tables” (Application Fundamentals).

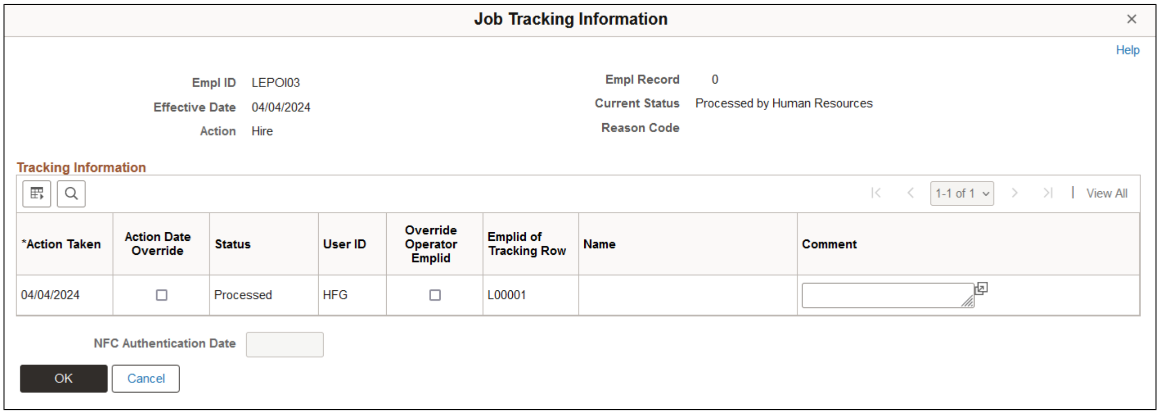
Job Tracking Information Page

Use the Job Tracking Information page (GVT_EE_CNTRL_SEC) to view or enter job-tracking information.

Navigation:

Click **Tracking Data** link on the Data Control page.

This example illustrates the fields and controls on the Job Tracking Information page. You can find definitions for the fields and controls later on this page.



Tracking Information

Field or Control	***Description***
Action Taken	Displays the date that the action request was entered.
Action Date Override	Select to make the **Action Taken** field available for entry so that you can change the action date.
Override Operator Emplid (override operator employee ID)	(Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.
Emplid of Tracking Row (employee ID of tracking row)	When the **Override Operator Emplid** check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.

Personal Data Page

Use the Personal Data page (GVT_PERS_DATA1) to enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.

The Personal Data page does not appear when you are entering an additional assignment for a federal employee.

Navigation:

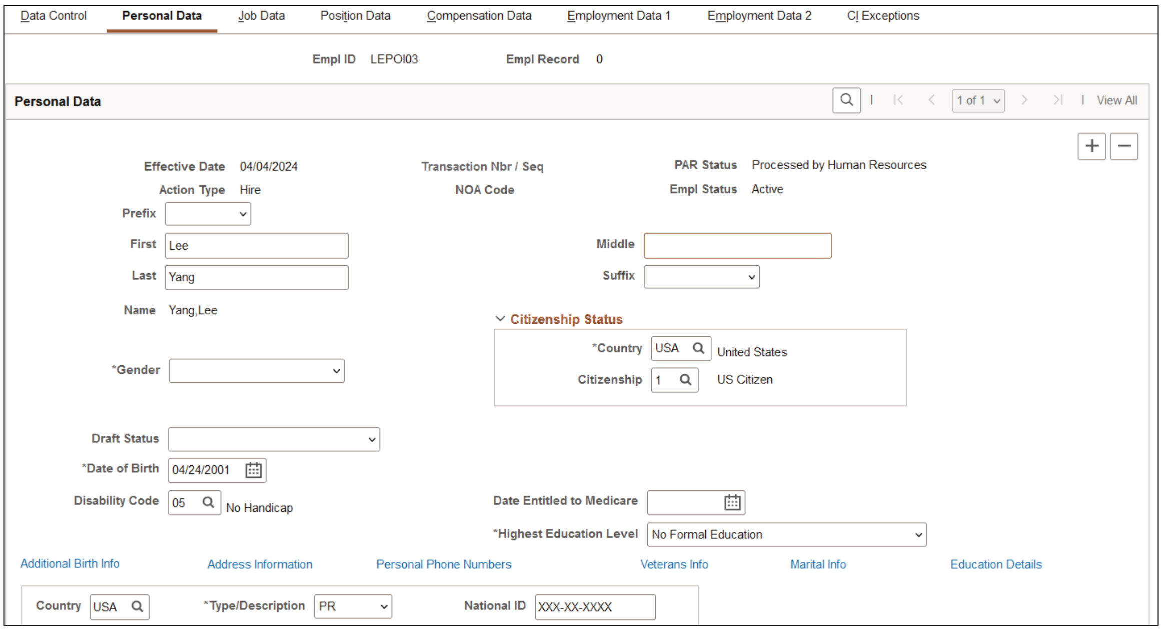
Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Personal Data page.

If previous personal data exists that is associated with an individual as a Person of Interest or a Contingent Worker this information is displayed by default on the Personal Data page.

Note: If a person already exists in the system, as a contingent worker for example, default field entries are displayed in some of the fields on the Personal Data page when you access it through the Add Employment Instance USF component.

This example illustrates the fields and controls on the Personal Data page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Empl ID	When you create a concurrent job, or an employment instance for a person of interest or contingent worker, the previously assigned Person ID is displayed.
Effective Date	The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page.
Gender	Indicate the employee's gender.
Citizenship Status	Select the appropriate citizenship status.
Draft Status	(Optional) Select a draft status.

Field or Control	*Description*
Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Although this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, it is recommended that you enter the information later.
Disability Code	Select the disability code from the list, or if none, select the value *No Handicap.*
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Country	Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.
Type/Description	Enter the corresponding type/description of the employee's national ID.
National ID	Enter the employee's Social Security Number.
Additional Birth Info	Click to access the Addl Birth Info page and enter the employee's birth information.
Address Information	Click to access the Address Information page and enter home and mailing address information.
Personal Phone Numbers	Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers.
Veterans Info (veterans information)	Click to access the Veterans Info page and enter veterans information.
Marital Info (marital information)	Click to access the Marital Status page and enter marital information.

Related Links

Requesting Terminations Due to Death

“Understanding U.S. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)

“PeopleSoft Manage Base Benefits Overview” (PeopleSoft Human Resources Manage Base Benefits)

Additional Birth Information Page

Use the Additional Birth Information page (GVT_BRTHINF_SEC) to enter birth information.

Navigation:

Click **Additional Birth Info** link on the Personal Data page.

This example illustrates the fields and controls on the Additional Birth Information page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Birth Location	Enter the name of the city.
Birth State	Select the birth state.
Birth Country	Select the birth country.

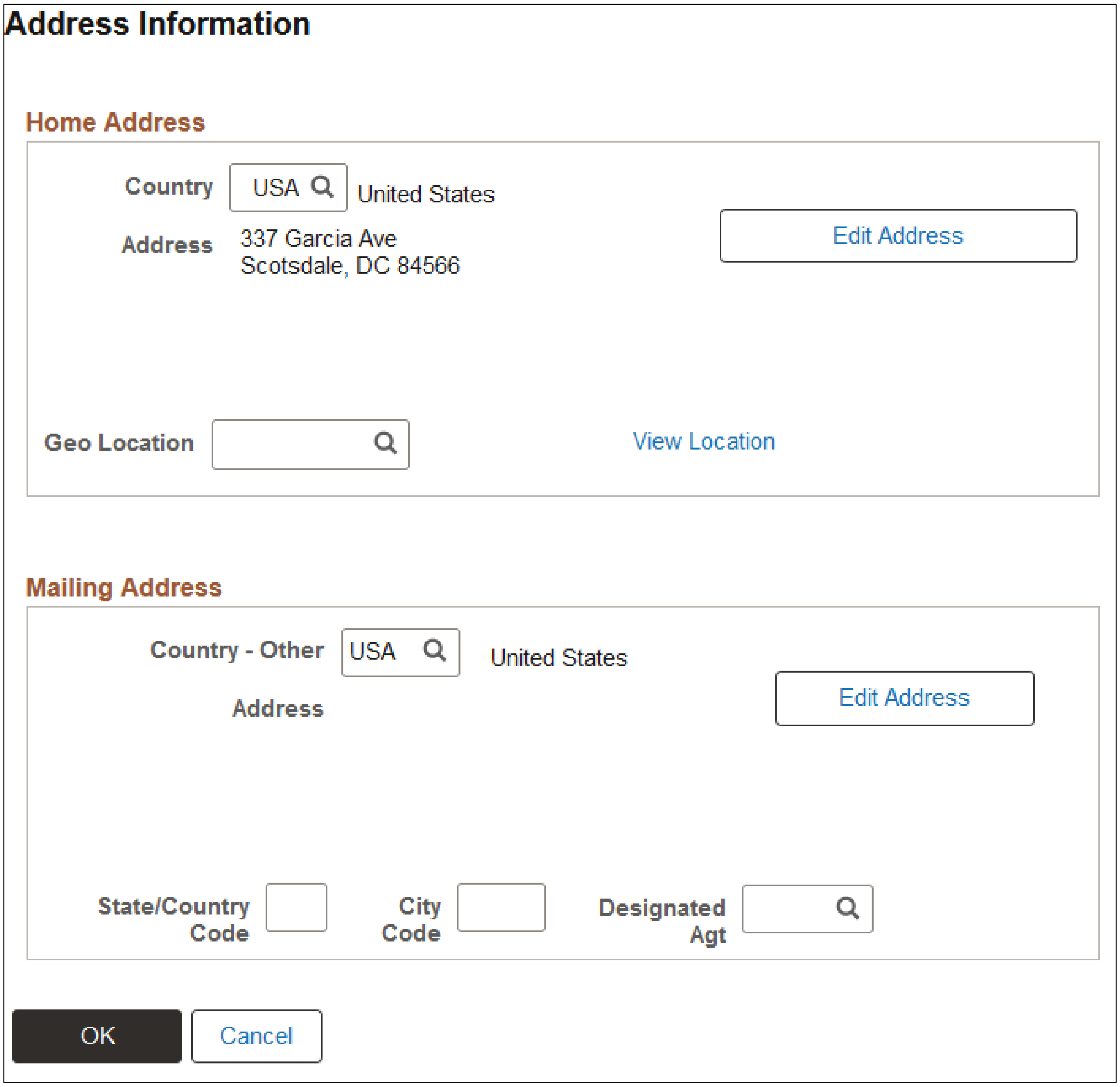
Address Information Page

Use the Address Information page (GVT_ADDRINF_SEC) to enter home and mailing address information.

Navigation:

Click **Mailing Address** link on the Personal Data page.

This example illustrates the fields and controls on the Address Information page. You can find definitions for the fields and controls later on this page.



Select the country and then click **Edit Address.** Complete the address fields that appear on the page and click **OK.** The address information appears in the **Address** field.

Related Links

"Administering Country Codes" (Application Fundamentals)

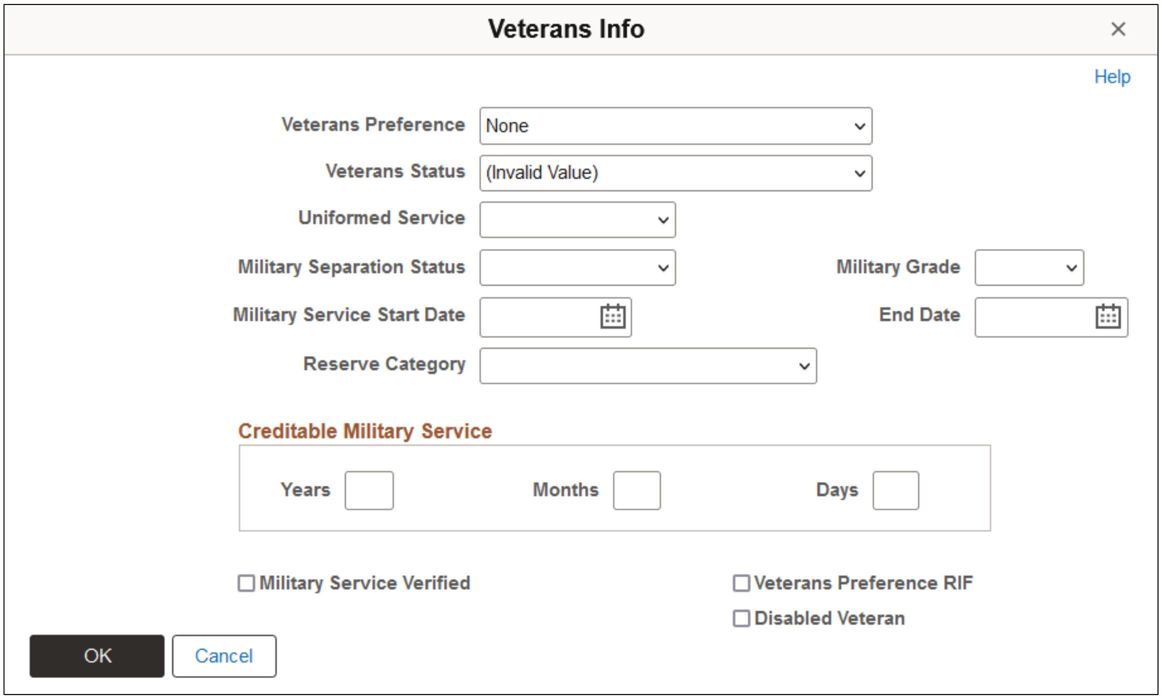
Veterans Info Page

Use the Veterans Info page (GVT_VETINF_SEC) to enter veteran information.

Navigation:

Click **Veterans Info** link on the Personal Data page.

This example illustrates the fields and controls on the Veterans Info page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Veterans Preference	Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide.*
Veterans Status	Select the veteran's status.
Uniformed Service	Select the type of uniformed service in which this veteran served.
Military Separation Status	Select the veteran's military separation status.
Military Grade	Select the veteran's military grade.
Military Service Start Date and **End Date**	Enter the veteran's military service start and end dates.
Reserve Category	Select the employee's reserve category, or select *Not Applicable.*
Years, Months, and Days	Enter the creditable military service in years, months, and days.
Military Service Verified	Select if you have received verification of service.

Field or Control	***Description***
Veterans Preference RIF (veterans preference reduction in force)	Select to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.
Disabled Veteran	Select if the veteran is disabled.
Notify Military Pay Center	This check box is visible only for personnel actions that were effective before October 1, 1999. For these personnel actions, the check box indicates whether the military pay center was notified of the personnel action. This check box is informational only and therefore not editable. **Note:** The system displays this field only when the personnel action effective date is prior to October 1, 1999. Due to S1059, the National Defense Authorization Act for FY 2000, Public Law 106-65, this information is no longer required as of October 1, 1999.

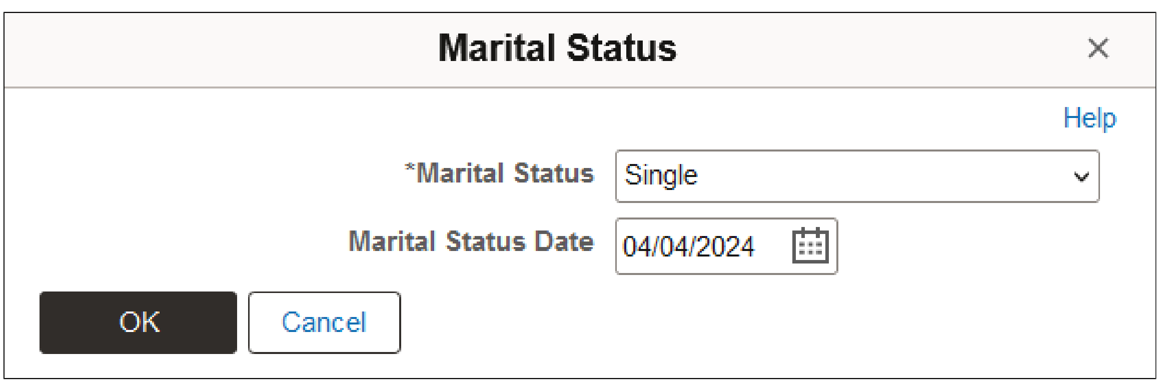
Marital Status Page

Use the Marital Status page (GVT_MARITAL_SEC) to enter marital information.

Navigation:

Click **Marital Info** link on the Personal Data page.

This example illustrates the fields and controls on the Marital Status page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Marital Status	Select the person's marital status.
Marital Status Date	Enter the date on which this status took effect.

Add Employment Instance USF - Job Data Page

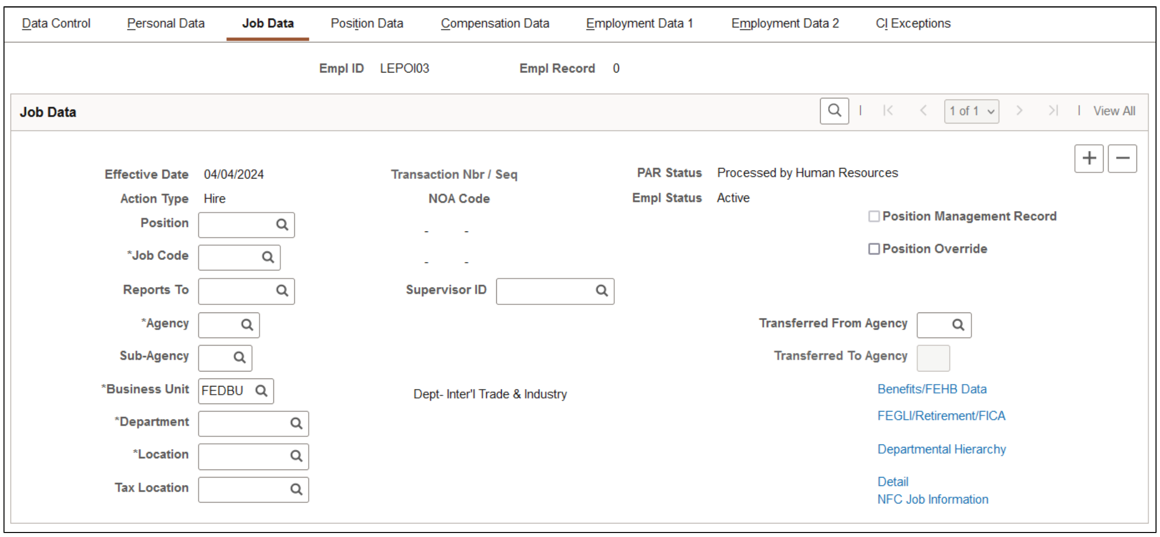
Use the Job Data page (GVT_JOB1) to enter job information, including the employee's position, agency, and department.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Job Data page.

This example illustrates the fields and controls on the Job Data page. You can find definitions for the fields and controls later on this page.



Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, you can override most of these defaults.

Field or Control	***Description***
Action Type	Set by default depending on the type of employment instance you are creating.

Field or Control	*Description*
Position	Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data. In addition, the system inserts a default value in the **Supervisor's ID** and **Reports to Position** fields on the Employment 2 page if these are entered when setting up the position. If you've associated agencies with departments on the Department page, the system enters the agency code on the Job Data page and the field is unavailable for entry. It also enters default values on the Position Data page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position Data page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The **Position Number, Hire Date,** and **Position Override** fields are discussed in Hiring Employees Into Positions.

Field or Control	*Description*
Position Management Record	Selected by default if updates to the Position Management record exist. For an initial employment instance (for a new hire), the check box is deselected, as the new hire would not have information to update. If your organization uses the Manage Positions business process and this position were updated, the check box would be selected. The option then would be to select the **Position Override** check box to make changes to position data that are otherwise locked in by the position data record.
Job Code	If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.

Field or Control	*Description*
Position Override	Select to change any of the position-related fields, such as the **Job Code, Department, Agency,** and **Sub-agency.** PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position. **Note:** After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.
Agency, Sub-Agency, Business Unit, Department, and **Location**	Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values when the **Position** ID is selected.
Transferred From Agency	If the reason code entered on the Data Control page was *Transfer,* select the agency from which the employee is transferring. **Note:** Not valid for a concurrent assignment.
Transferred To Agency	This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page. **Note:** Not valid for a concurrent assignment.
Tax Location	Derived from the department-tax location relationship established on the Department page. You can also select the tax location for this person.

Related Links

Understanding PARs

Defining Personnel Actions and Reasons

“Understanding Payroll Schedules” (PeopleSoft Payroll Interface)

“Understanding Positions” (PeopleSoft Human Resources Manage Positions)

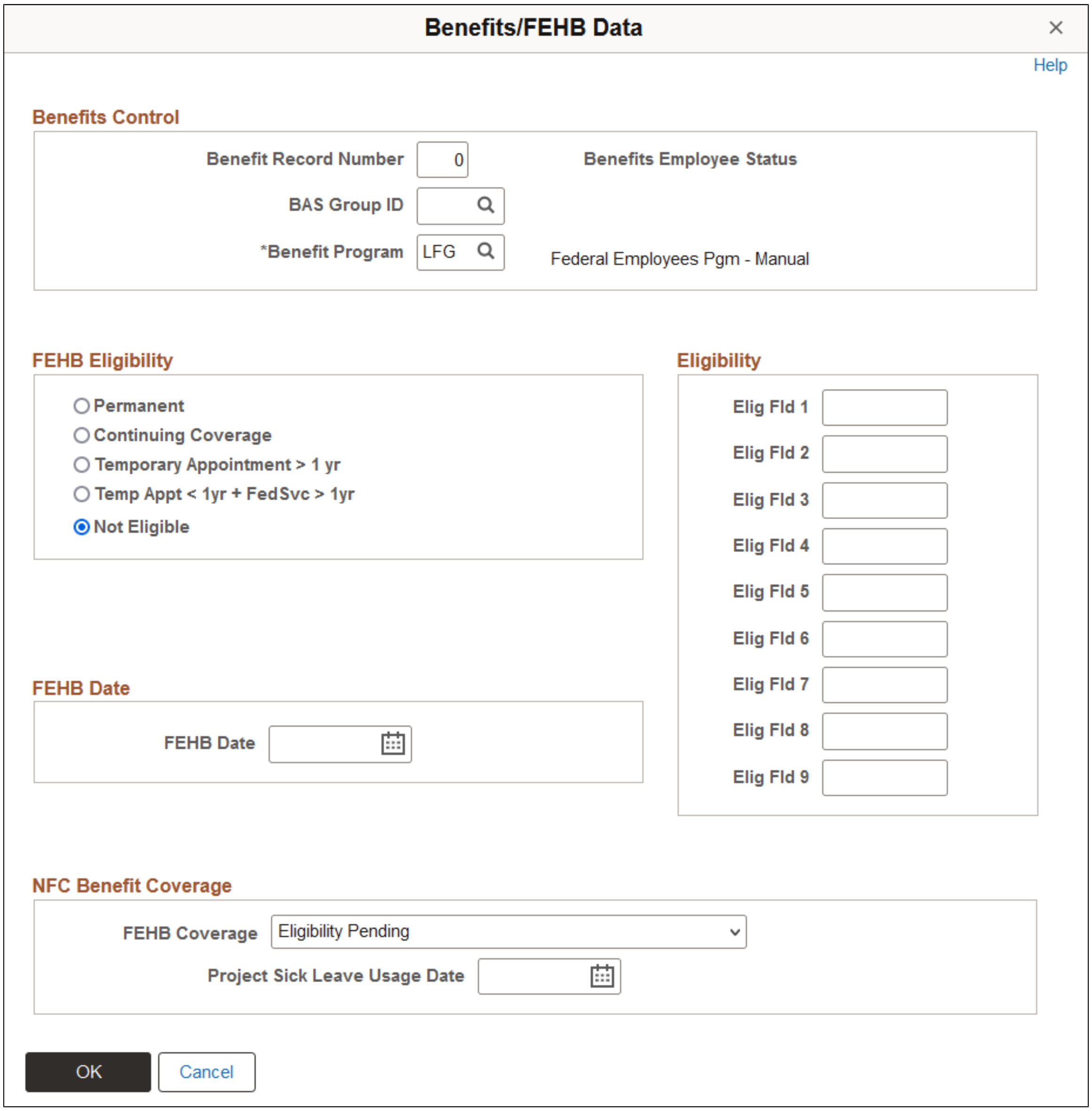
Benefits/FEHB Data Page

Use the Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data) page (GVT_BENDATA_SEC) to specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Navigation:

Click **Benefits/FEHB Data** link on the Job Data page.

This example illustrates the fields and controls on the Benefits/FEHB Data page. You can find definitions for the fields and controls later on this page.



Benefits Control

Field or Control	***Description***
Benefit Record Number	Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.
BAS Group ID (benefits administration system group ID)	(Optional) Enter a BAS group ID.
Benefit Program	Enter a benefit program. This is a required field for all PAR transactions.

FEHB Eligibility

In the FEHB Eligibility (federal employees health benefits eligibility) group box, select the appropriate option to indicate the FEHB eligibility.

If you select *Not Eligible,* the **FEHB Date** field becomes available for entry. This typically applies to temporary employees.

FEHB Date

In the FEBH Date group box, enter the date that the employee is eligible for FEHB.

Eligibility

In the Eligibility group box, enter values in the **Elig Fld 1–9** (eligibility field 1–9) fields to further define an employee's benefits eligibility.

Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.

Benefits System

In the Benefits System group box, enter the benefits system to use.

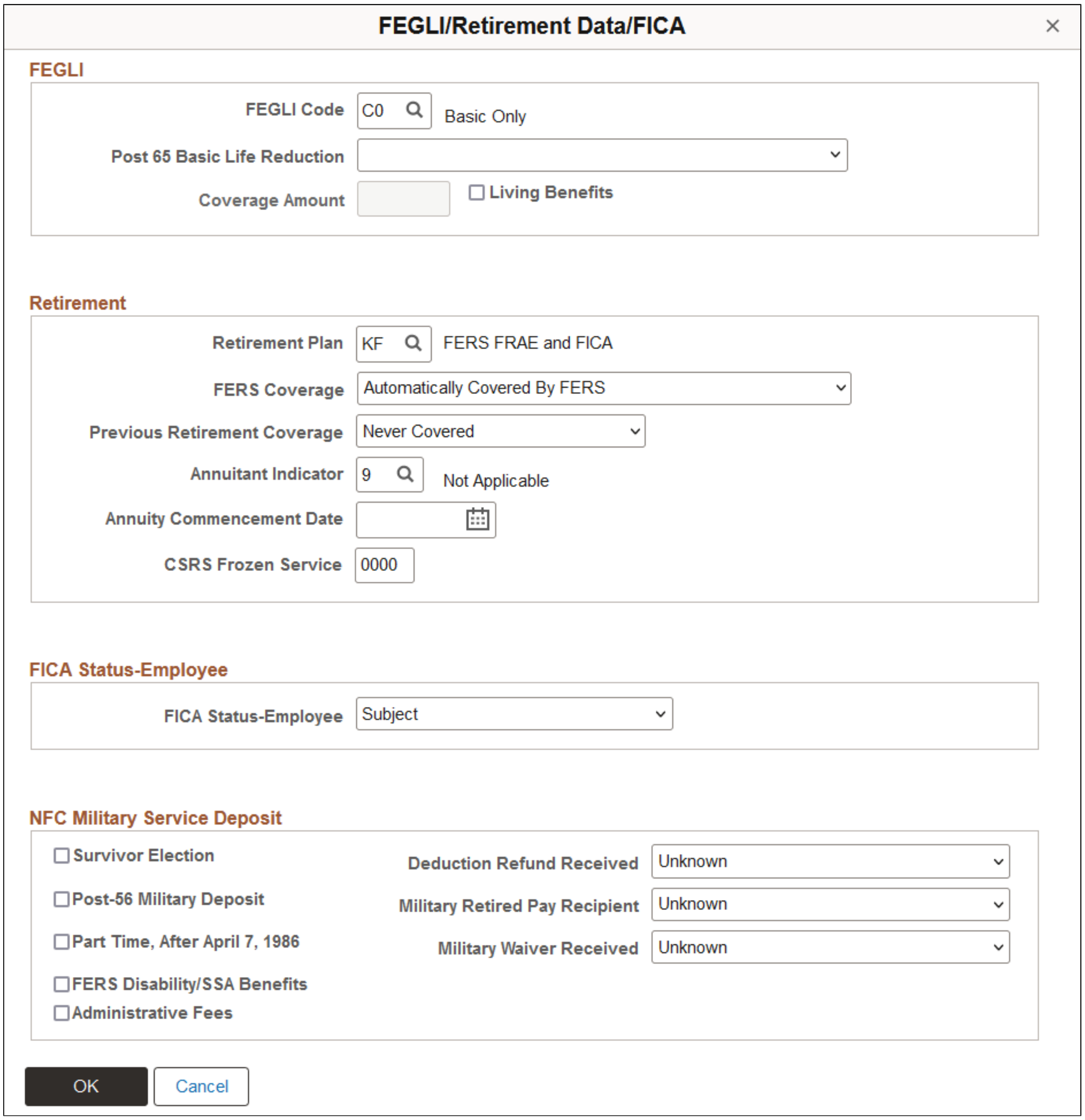
FEGLI/Retirement/FICA Page

Use the FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act) page (GVT_BENDATA1_SEC) to enter life insurance and retirement data.

Navigation:

Click **FEGLI/Retirement/FICA** link on the Job Data page.

This example illustrates the fields and controls on the FEGLI/Retirement Data/FICA page. You can find definitions for the fields and controls later on this page.



FEGLI

Field or Control	***Description***
FEGLI Code (federal employees group life insurance code)	Enter the FEGLI code.
Post 65 Basic Life Reduction	Select the employee's post-65 basic life reduction coverage.

Field or Control	*Description*
Living Benefits and **Coverage Amount**	Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Field or Control	*Description*
Retirement Plan	Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Code	*Explanation*
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

Field or Control	***Description***
FERS Coverage (Federal Employees Retirement System coverage)	Select the employee's FERS coverage.
Previous Retirement Coverage	Select the employee's previous retirement coverage.
Annuitant Indicator	Select the employee's annuitant indicator.
Annuity Commencement Date	If a new employee is a reemployed annuitant, enter the annuity commencement date.
CSRS Frozen Service (Civil Service Retirement System frozen service)	Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

Field or Control	***Description***
FICA Status-Employee	Indicate whether the employee is exempt, subject, or subject to Medicare only.

Related Links

Requesting Terminations Due to Death
"PeopleSoft Manage Base Benefits Overview" (PeopleSoft Human Resources Manage Base Benefits)

Detail Assignment page

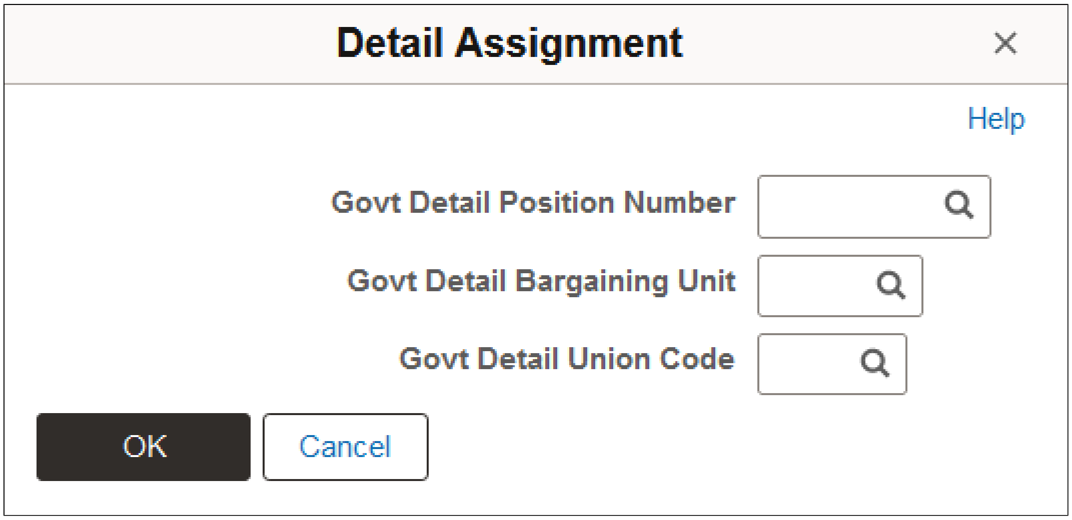
Use the Detail Assignment page (GVT_DETAIL_SEC) to track information for employees on a detail assignment.

You probably won't use this page when first hiring an employee.

Navigation:

Click **Detail** link on the Job Data page.

This example illustrates the fields and controls on the Detail Assignment page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
GVT Detail Position Number (government detail position number)	Select the employee's detail position number.
GVT Detail Bargaining Unit (government detail bargaining unit)	Select the employee's detail bargaining unit.
GVT Detail Union Code (government detail union code)	Select the employee's detail union code.

Federal NFC Page Page

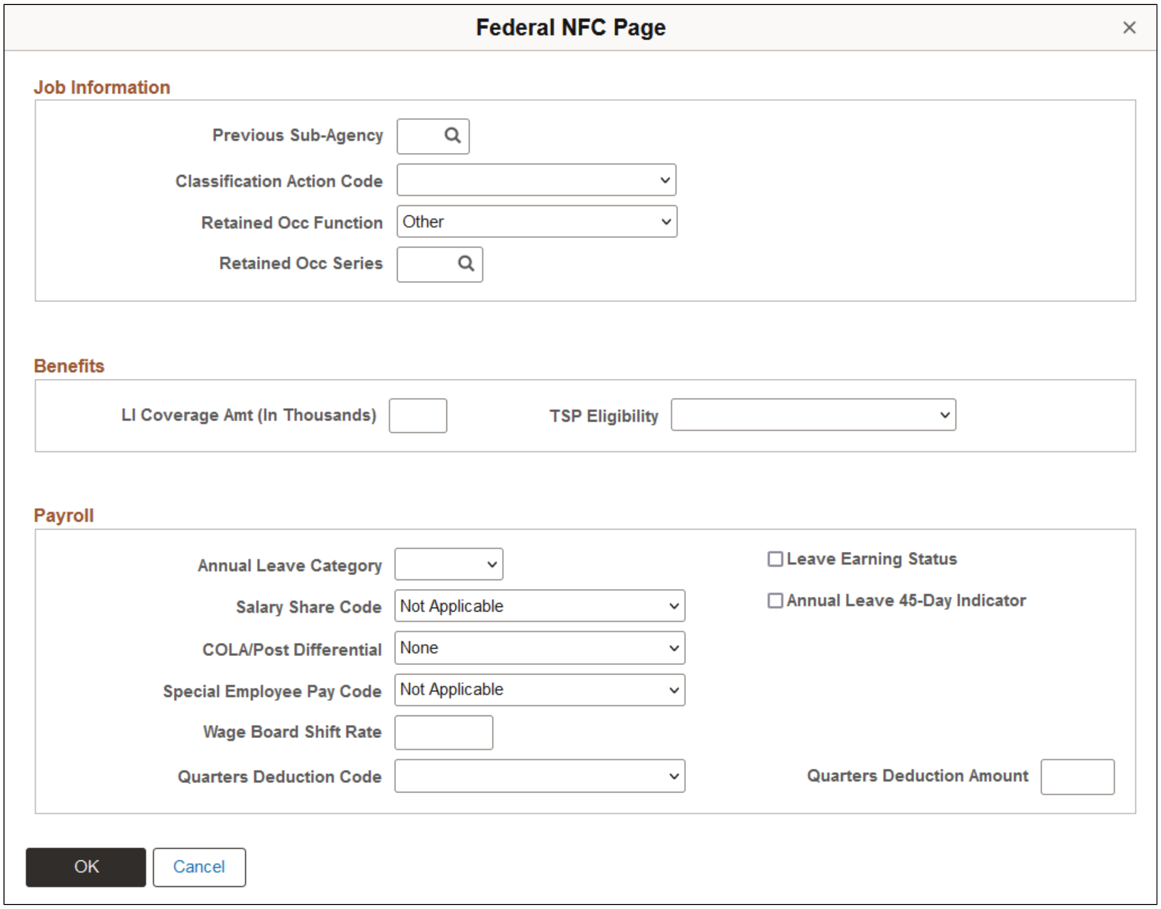
Use the Federal NFC Page page (GVT_NFC_JOB_SEC) to track required National Finance Center (NFC) information for employees.

Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.

Navigation:

Click the **NFC Job Information** link on the Job Data page.

This example illustrates the fields and controls on the Federal NFC Page page. You can find definitions for the fields and controls later on this page.



Note: The **NFC Job Information** link appears on the Job Data page only if NFC (National Finance Center) product specific data is turned on at installation. The **NFC Job Information** link must appear on the Job Data page for you to access the NFC Job Information page described here.

Job Information

Field or Control	***Description***
Previous Sub-Agency	Enter the previous sub-agency when the employee moves to another sub-agency within the same Department.

Field or Control	***Description***
Classification Action Code	Provides a method for processing a classification and personnel action at the same time. Used for reassignments, promotions or change to a lower grade.

Field or Control	Description
Retained Occ Function (retained occupational functional classification)	Records the occupational functional classification corresponding to an employee's retained occupational series. This field is required only if the series specified as the retained occupational series is one for which OPM requires an occupational functional classification.
Retained Occ Series (retained occupational series)	Records the occupational series on which an employee's salary is to be based when that series is not the series of the position the employee held immediately before being placed on grade retention. This would occur, for example, when an employee was returned to an unexpired period of grade retention at the end of a temporary promotion.

Benefits

Field or Control	Description
LI Coverage Amt (In Thousands) [life insurance coverage amount (in thousands)]	The amount of basic life insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. Complete this field only if one or more of the following conditions are met: • The employee works at such different rates of pay that the payroll/personnel system is unable to calculate or project the rates of pay on an annual basis. • The employee is paid on a piecework basis. • The employee is paid at different rates of pay during the year.
TSP Eligibility	Specify the type of eligibility for the employee to participate in the Federal Thrift Savings Plan (TSP) for FERS, CSRS, or Offset employees.

Payroll

Field or Control	Description
Annual Leave Category	Select the code that identifies the annual leave earning status in the NFC payroll system. If the employee is eligible to earn annual leave, the code represents the appropriate earning category.

Field or Control	***Description***
Leave Earning Status	Select the check box to identify employees who are entitled to leave accruals for the first and last pay period of employment in the NFC payroll system.
Salary Share Code	Identifies the source, in addition to the agency, that contributes to paying the employee's salary.
Annual Leave 45-Day Indicator	Select the check box to identify employees who are stationed at an overseas foreign post of duty and are entitled to carry forward from one leave year to another a maximum annual leave accumulation of 45 days.
COLA/Post Differential	Select the option that identifies the type of cost of living allowance (COLA) or post differential, in addition to the base salary, that the employee is entitled to receive.
Special Employee Pay Code	Identifies the employee as belonging to a special category of pay processing not accommodated in any other part of the NFC payroll/personnel system. This code enables certain operations to be performed which would not otherwise be applicable to this type of employee.
Wage Board Shift Rate	Enter the rate that NFC uses to compute pay for the varied shift time reported on the T&A for wage system employees.
Quarters Deduction Code	Select the code to identify the type of quarters deduction for the employee.
Quarters Deduction Amount	The monetary amount that is to be deducted through NFC payroll, either per day or per pay period, from the salary of an employee who is being furnished quarters, utilities, or other in kind allowances.

Note: The information entered on this page is for NFC reporting purposes only. Benefit or payroll information that is entered on this page is *not* integrated with PeopleSoft benefit or payroll applications.

Add Employment Instance USF - Position Data Page

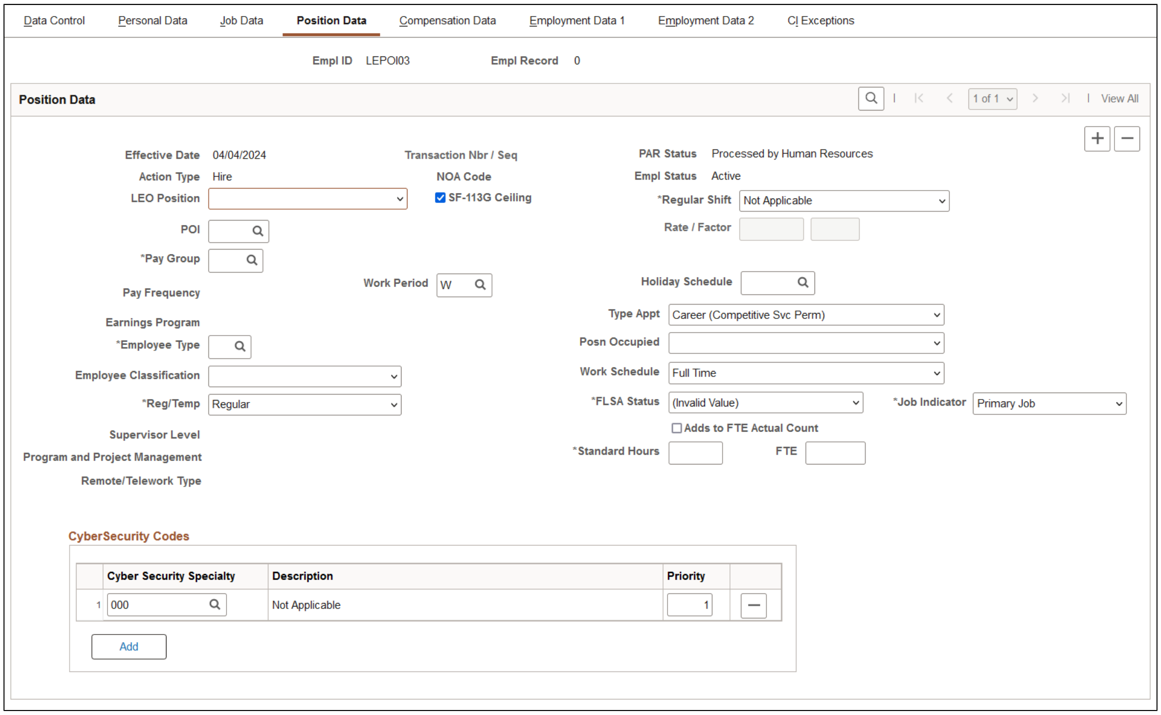
Use the Position Data page (GVT_JOB2) to enter position information like employee type, classification, appointment type, work schedule, and pay group.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Position Data page.

This example illustrates the fields and controls on the Position Data page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
LEO Position (law enforcement officer position)	If this is a law enforcement officer position, a value appears from the Job Code page. **Note:** The system applies pay cap and limit rules defined on the USF Pay Plan Table for Law Enforcement Officer (LEO) employees only if the employee's LEO Status from the job record is either *Primary FEPCA* or *Secondary FEPCA*. For information about pay cap and limit rules, see "Administering Pay Caps and Limits" (PeopleSoft Payroll for North America).
SF-113G Ceiling	If this position is reportable for the SF-113G ceiling, select this check box.
POI (personnel office identifier)	Set by default from the Add/Update Position Info component or the Job Code page.
Regular Shift and **Rate/Factor**	If the employee is working shifts, select the appropriate shift, and specify the rate or factor for that shift type.

Field or Control	***Description***
Pay Group	(Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.
Pay Frequency	Set by default from the Pay Group page.
Work Period	Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).
Holiday Schedule	If you linked an established holiday schedule on the Pay Group page, it appears here.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as *Career* (Competitive Service Permanent), *Limited, Executive,* or *Schedule A - C.*
Employee Type	Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.
Posn Occupied (position occupied)	This field identifies the type of appointment which can occupy the position. Values are *Competitive, Excepted Senior Executive Service (SES) Career Reserved* and *SES General.* This is a CPDF reported field.
Employee Classification	Provides another method of grouping employees.
Work Schedule	Set by default from the Add/Update Position Info – Description page.
Reg/Temp (regular/temporary)	Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Human Resources uses this value when determining eligibility requirements.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Select to include this employee's job when processing FTE edits for budgeting purposes.

Field or Control	*Description*
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.
Program and Project Management	**Note:** This field is available for job data rows with the effective date of August 2, 2023 or later. Displays the managerial position for this person, which can be used for reporting to the OPF. The value comes first from the position, however, if the position does not have this value defined, it is provided by default from the job code. **Note:** This value is for display purposes only to aid PAR processors. It is not stored on PAR tables.
Remote/Telework Type	**Note:** This field is available for job data rows with the effective date of September 1, 2023 or later. Displays the remote worker/teleworker agreement type for this person, which can be used for reporting to the OPF. The value comes first from the position, however, if the position does not have this value defined, it is provided by default from the job code. **Note:** This value is for display purposes only to aid PAR processors. It is not stored on PAR tables.

Cyber Security Code

Field or Control	*Description*
Cyber Security Specialty	Select the applicable Cyber Security Specialty code. It Indicates the cyber security specialty required for this position and the specialty area where the work of the incumbent is predominantly done. This is a CPDF reported field.

Field or Control	*Description*
Priority	Indicate the priority of the selected Cyber Security code, if you have selected more than one Cyber Security code for the position. **Note:** Add button and Priority fields are visible only for row with Effective Date on or after December 1st 2016.
Add Cyber Security Code	Click the button to add more Cyber Security code to the position. **Note:** You can only add up to three Cyber Security codes to a position.

Note: Cyber Security Codes for an employee is stored in a new child record GVT_EE_CYB_CD. Data in GVT_JOB.GVT_CYBER_SEC_CD is marked obsolete and should not be used.

Related Links

"Understanding Frequency IDs" (Application Fundamentals)

Add Employment Instance USF - Compensation Data page

Use the Compensation Data page (GVT_JOB3) to enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay.

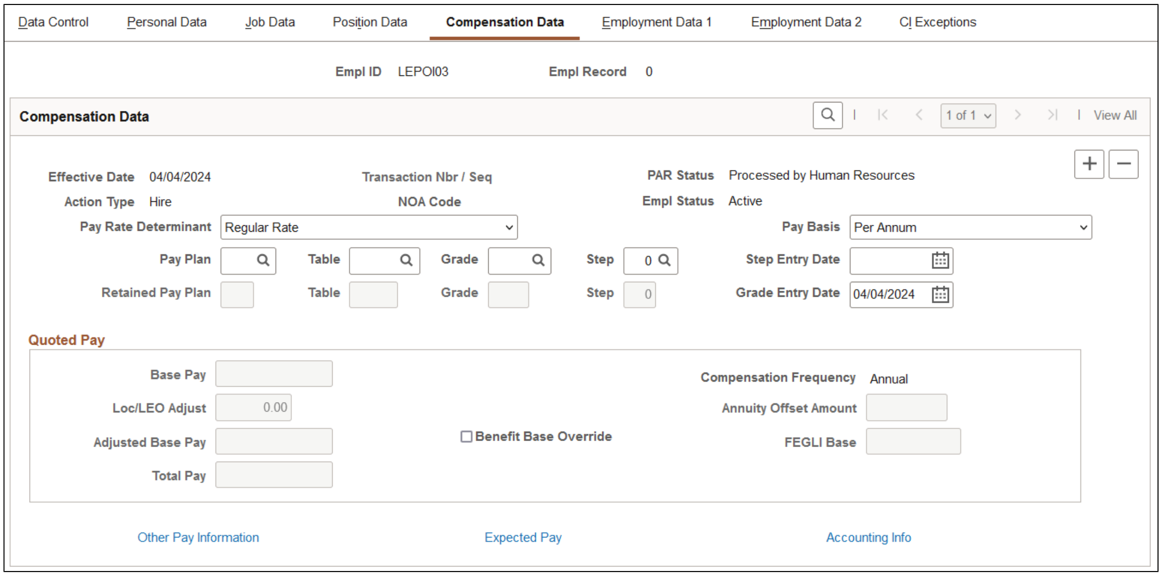
You can also enter retained pay plan/table/grade and step on this page.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Compensation Data page.

This example illustrates the fields and controls on the Compensation Data page. You can find definitions for the fields and controls later on this page.



Note: Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job Data page. Override these values if necessary.

Field or Control	*Description*
Pay Rate Determinant	Select a pay rate determinant.
Pay Basis	This field is for HR purposes only and is used in CPDF edits. It is not used in the PeopleSoft Federal Payroll system to calculate or pay the employee; as long as an employee is active, a paysheet will still be created and the employee paid. Select the basis that defines the ranges for basic pay. A rate of basic pay is expressed consistent with the applicable pay basis. Values are in accordance with the United States Office of Personnel Management (OPM) and the value selected should be in accordance to the latest OPM guidance.
Pay Plan/Table/Grade	Select the pay plan, table, and grade. Once these are entered, the PeopleCode automatically populates the data in the **Quoted Pay** group box and the Expected Pay Page, accessible through the **Expected Pay** link on this page. The adjusted hourly rate from the Expected Pay page is reflected on the paysheets and used to calculate the payroll checks.

Field or Control	*Description*
Step	Assign the correct step for the employee. **Note:** For certain Pay Rate Determinants this is not an option and the field does not accept data.
Step Entry Date	The effective date of the request for this action. If the **Multi-Step/Grade** check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.
Rtnd PP/Table/Grade (retained pay plan/table/grade)	There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.
Step and **Grade Entry Date**	Enter the step and the date the employee was first assigned to the grade and step.
Base Pay	If you are using partial or full position management, a value is set by default here based on your prior assignment in the **Step** field. A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected the **Position Override** check box on the Job Data page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the **Loc/LEO Adjustment** (if appropriate) and **Total Pay** fields after you have provided the compensation data.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.
Compensation Frequency	Set by default from the Job Code page; override if necessary.

Field or Control	***Description***
Annuity Offset Amount	This field is available only after the annuitant job record has been saved with one of the following values in the Annuitant Indicator field: *1, 4, 5, A, C,* or *E.* If the employee is an annuitant, enter a CSRS, FERS, or FERS RAE annuity offset amount. **Note:** The Annuity Offset Amount that you enter cannot be greater than the Base Pay amount.
Benefit Base Override and **FEGLI Base**	The system calculates the FEGLI base rate. Select the **Benefit Base Override** check box to override this default and then enter a new amount.
Other Pay Information	Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay.
Expected Pay	Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page.
Accounting Info	Click to access the Accounting Information page and view a summary of the employee's job earnings distribution.

If you selected the **Multi-currency** check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation Data page. If you associated pay plans with job codes, the **Pay Plan** field is populated by default from the data in the Job Code table. The **Grade** field is populated by default from the Job Code page. After the values in the **Pay Plan** and **Grade** fields appear, the system also displays the **Grade Entry Date** field, which is the date the employee first joined the grade. When a value is entered in the **Step** field, the value in the **Step Entry Date** field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

Other Pay Information Page

Use the Other Pay Information page (GVT_OTH_PAY_SEC) to enter compensation that employees receive that's in addition to base pay.

Navigation:

Click **Other Pay Information** link on the Compensation Data page.

This example illustrates the fields and controls on the Other Pay Information page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Earnings Code	Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Note: A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

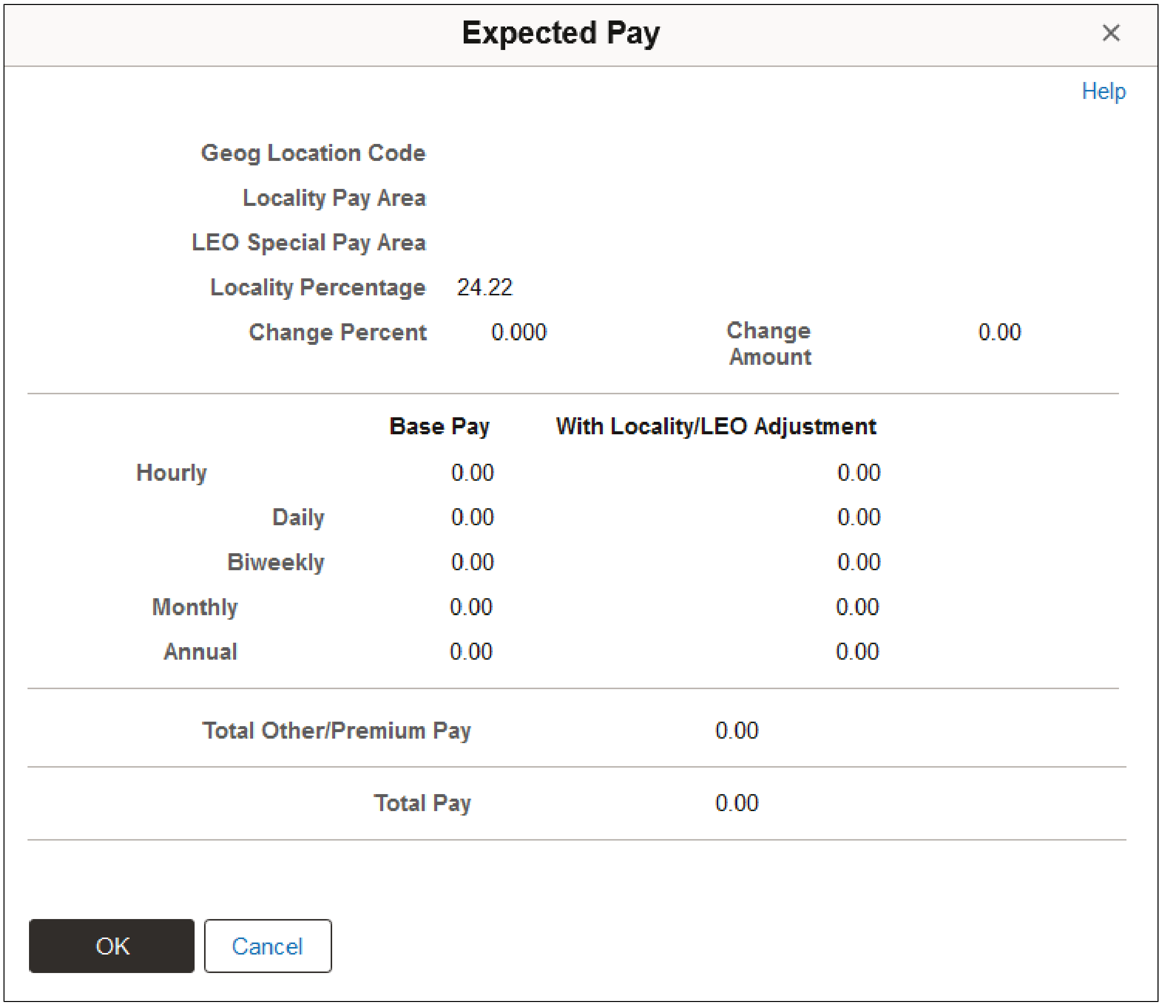
Expected Pay Page

Use the Expected Pay page (GVT_LOC_PAY_SEC) to view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.

Navigation:

Click **Expected Pay** link on the Compensation Data page.

This example illustrates the fields and controls on the Expected Pay page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Locality Percentage or **LEO Percentage** (law enforcement officer percentage)	Displays the locality or LEO percentage. This field shows the **LEO Percentage** label when the *Primary FEPCA* or *Secondary FEPCA* is selected in the **LEO Position** field. **Note:** The system applies pay cap and limit rules defined on the USF Pay Plan Table for LEO employees only if the employee's LEO Status from the job record is either *Primary FEPCA* or *Secondary FEPCA*.
Change Percent	Displays information regarding a percent change when new rows are inserted that change the base salary amounts.
Base Pay	Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee.

Field or Control	***Description***
With Locality/LEO Adjustment	The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page. The adjusted hourly rate is reflected on the paysheets and used to calculate the payroll checks.
Total Other/Premium Pay	The total of annual expected pay for the items you entered on the Other Pay Information page.
Total Pay	The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note: The **Rate Change Amount** and **Rate Change Percent** fields are used when awarding increases (not for new hires).

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Note: In the case of an employee that is subject to reaching a pay cap/limit, the compensation rate is displayed correctly, however, the change amount and change percent are displayed differently depending on whether you view this information on the USF Compensation Data – Expected Pay page or on the commercial compensation pages.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation Data page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation Data page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

Difference between quoted and expected pay on an annual basis = 20,940 USD.

Related Links

Understanding PARs

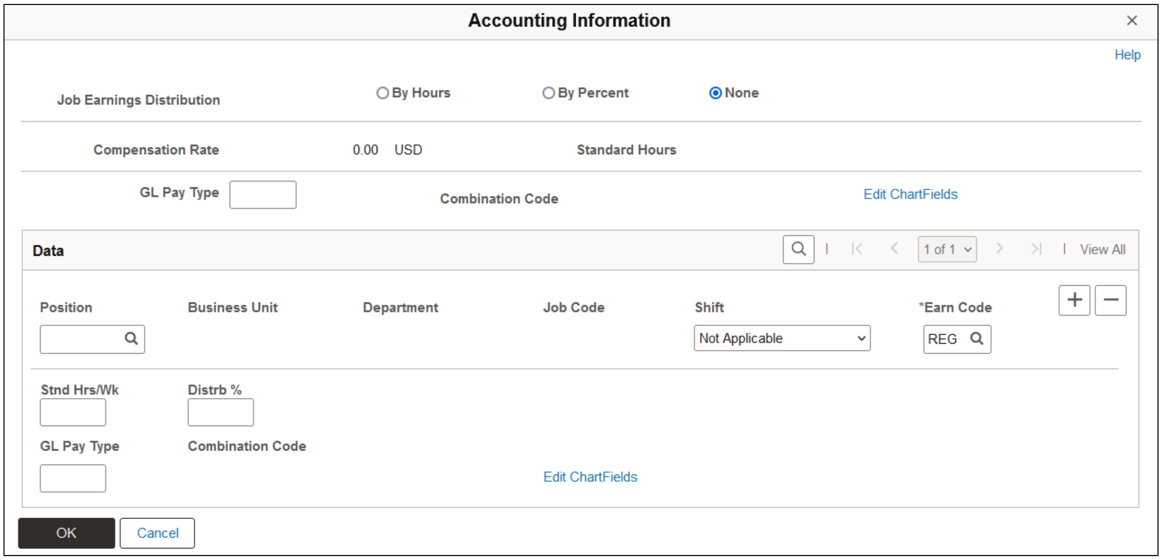
Accounting Information Page

Use the Accounting Information page (GVT_JOBDIST_SEC) to view a summary of the employee's job earnings distribution.

Navigation:

Click **Accounting Info** link on the Compensation Data page.

This example illustrates the fields and controls on the Accounting Information page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Job Earnings Distribution	Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all. When you select the **By Hours** or **By Percent** options, the **GL Pay Type** and **Account Code** fields are unavailable for entry. Use the scroll bar to distribute earnings among departments. If you select the **By Hours** option, then enter the hours to be distributed to each department in the **Standard Hours** field corresponding to each department entered. If you select the **By Percent** option, enter a percentage corresponding to each department in the **Percent of Distribution** field. Percentages must total 100 percent and must equal the value in the **Standard Hours** field.
Compensation Rate	The annual salary, including the locality and LEO adjustments.
Standard Hours	Set by default from the Job Code page.
GL Pay Type (general ledger pay type)	Enter the GL pay type that has been established by your agency.
Position, Business Unit, Department, Job Code, and **Shift**	Select the business unit, department, job code, position, and shift to which to charge the earnings.
Earn Code (earnings code)	Specify the earnings code. This will default to the Regular Earnings code defined on the Paygroup Table.

Field or Control	Description
Stnd Hrs/Wk (standard hours per week)	If you select the **By Hours** option, then specify how many hours will be charged to the corresponding earnings code.
Distrb % (percent of distribution)	If you select the **By Percent** job earnings distribution option, enter the percent to be charged to the corresponding earnings code.

Employment Data 1 Page

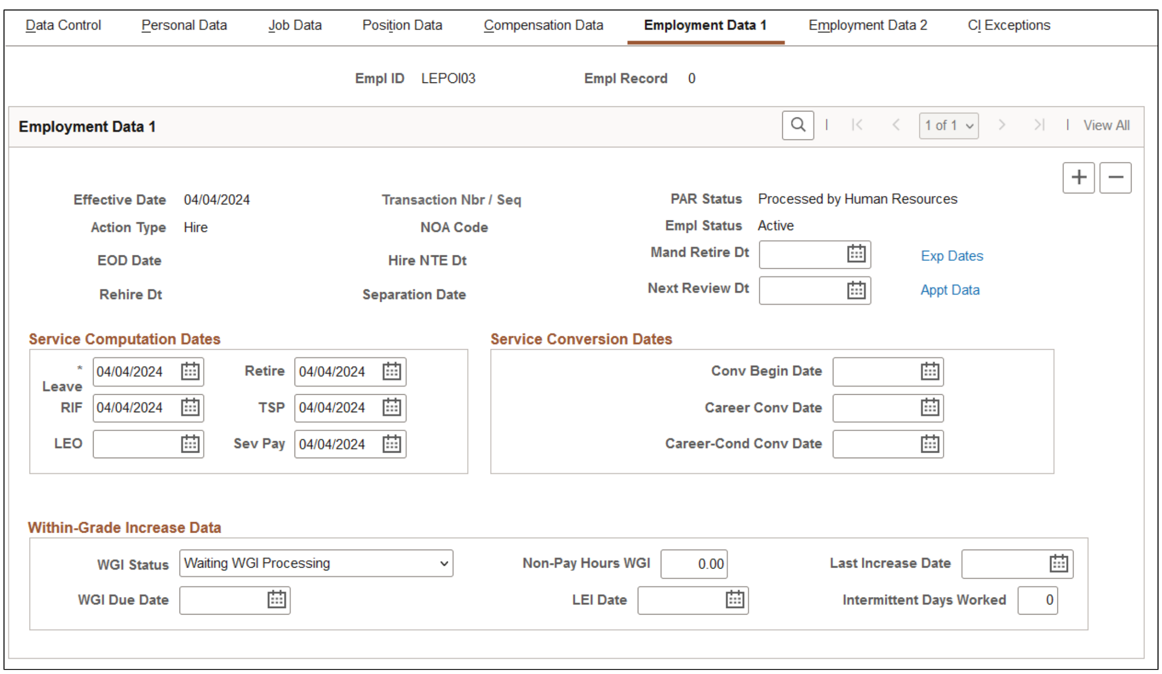
Use the Employment Data 1 page (GVT_EMPLOYMENT1) to enter employment information, such as employee service computation and conversion dates, and within-grade-increase data.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Employment Data 1 page.

This example illustrates the fields and controls on the Employment Data 1 page. You can find definitions for the fields and controls later on this page.



Many values on this page are set by default from values entered in the **Department** and **Job Code** fields on the Job Data page. When adding an employment instance, the system populates most of the dates on this page with the effective date of the action. These dates are used later in various ways to calculate the employee's service time. Override these values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The **Separation Date** field is display-only, and shows the date that the employee left employment.

Field or Control	*Description*
EOD Date (entered on duty)	Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.
Hire NTE Dt (hire not to exceed date)	Set by default from the **Not to Exceed Date** field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.
Mand Retire Date (mandatory retirement date)	If applicable, enter the employee's mandatory retirement date.
Exp Dates (expiration dates)	Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Next Review Dt (next review date)	Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.
Appt Data (appointment data)	Click to access the Appointment Info page and enter appointment limits.

Service Computation Dates

Field or Control	*Description*
Leave	Enter the service computation date for beginning the employee's leave computation.
Retire	Enter the service computation date for beginning the employee's retirement computation.
RIF (reduction in force)	Enter the computation date for establishing the employee's RIF position.
TSP (thrift savings plan)	Enter the computation date for beginning the employee's thrift savings plan eligibility computation.
LEO (law enforcement officer)	Enter the computation date for beginning the employee's law enforcement officer retirement computation.

Field or Control	Description
Sev Pay (severance pay)	Enter the service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Field or Control	Description
Conv Begin Date (conversion begin date), **Career Conv Date** (career conversion date), and **Career Cond Conv Date** (career-conditional conversion date)	Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the **Career Conv Date** field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the **Career-Cond Conv Dt** field is the effective date for that transaction.

Within-Grade Increase Data

Field or Control	Description
WGI Status (within-grade increase status)	Enter the WGI status, such as *(none), Approved, Waiting, Denied, N/A,* or *Postponed.* For a new employee, the default value is *Waiting*. *Created* is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is *Waiting* or *Approved.*
Non Pay Hours WGI and **Intermittent Days Worked**	Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the **Non Pay Hours WGI** field with nonpay hours from the WGI/Tenure Update report. **Note:** The WGI/Tenure Update process is a North American Payroll process specific to U.S. Federal government customers.

Field or Control	*Description*
Last Increase Dt (last increase date), **WGI Due Date,** and **LEI Date** (last equivalent increase date)	The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the **WGI Due Date** field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 2014, then your pay calendars need to be set up for 2014, 2015, 2016, and 2017. If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the **WGI Due Date** field with the extended due date from the WGI/Tenure Update report.

Related Links

Understanding Automatic Action Processing
"Creating Balance IDs" (Application Fundamentals)

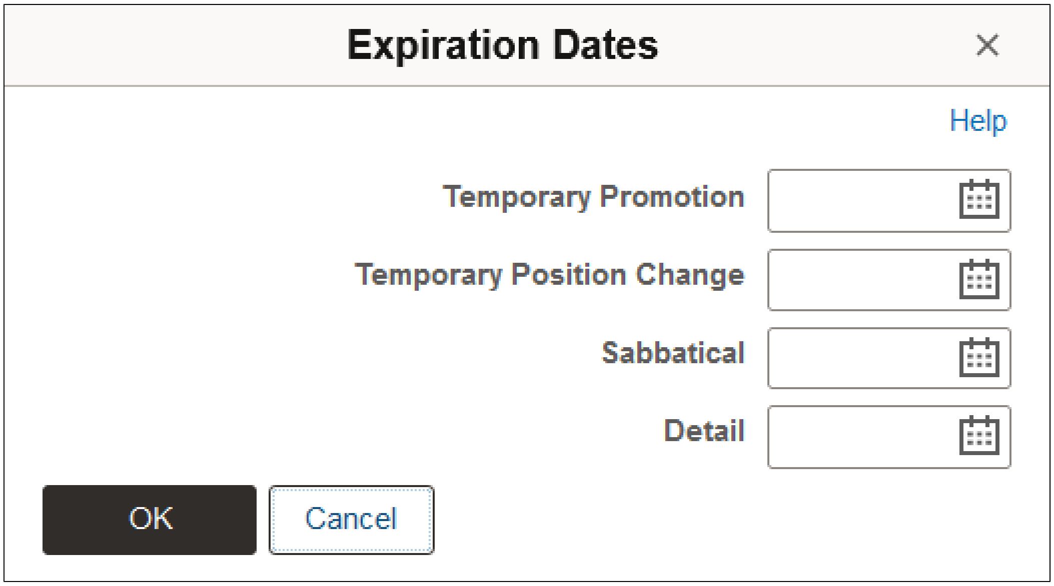
Expiration Dates Page

Use the Expiration Dates page (GVT_EXPIRDT_SEC) to enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

Navigation:

Click **Exp Dates** link on the Employment Data 1 page.

This example illustrates the fields and controls on the Expiration Dates page. You can find definitions for the fields and controls later on this page.



The following fields, which are updated by the user, are informational only.

Field or Control	***Description***
Temporary Promotion	Enter the temporary promotion date.
Temporary Position Change	Enter the temporary position change expiration date.
Sabbatical	Enter the sabbatical expiration date.
Detail	Enter the detail assignment expiration date.

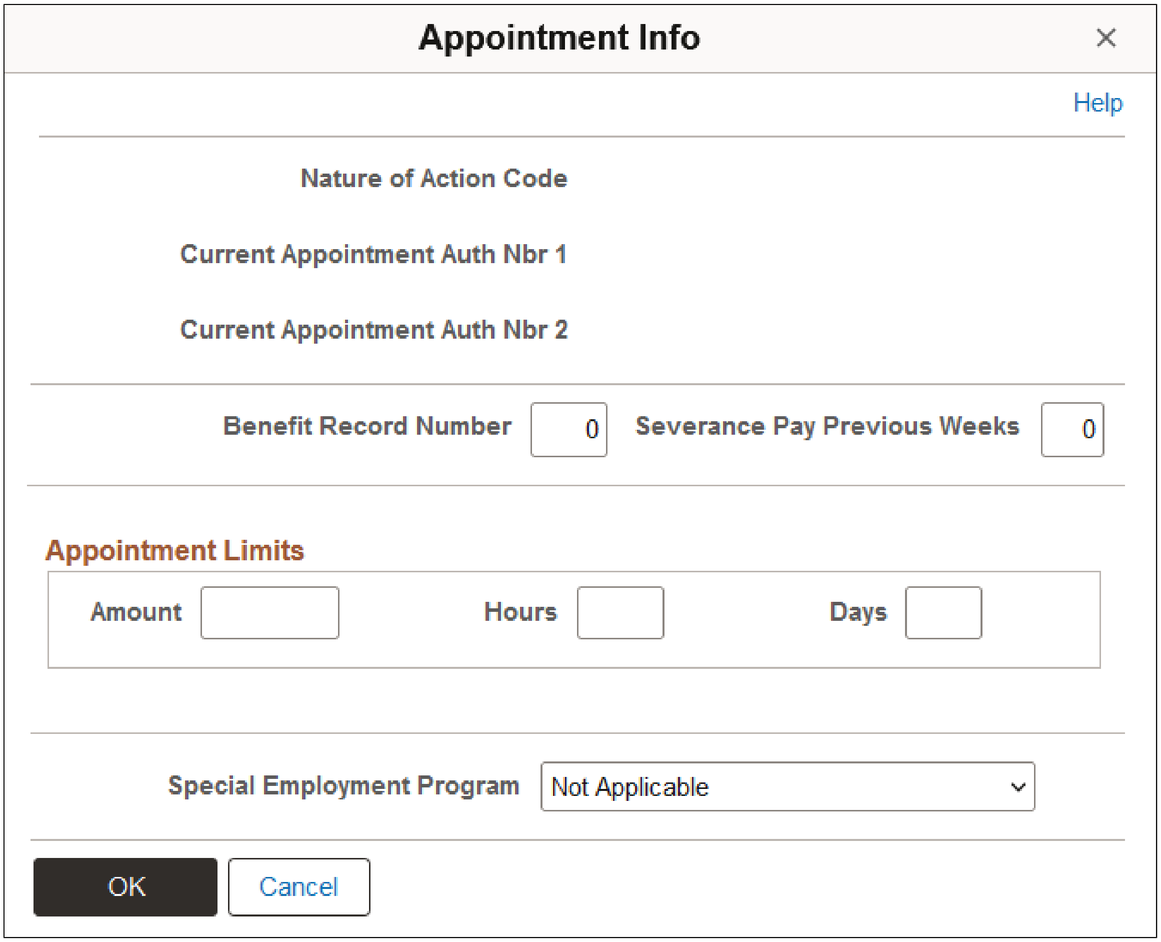
Appointment Info Page

Use the Appointment Info page (GVT_APPDATA_SEC) to enter appointment limits and indicate if this person is in a special employment program.

Navigation:

Click **Appt Data** on the Employment Data 1 page.

This example illustrates the fields and controls on the Appointment Info page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Nature of Action Code, Current Appointment Auth Nbr 1 (current appointment authorize number 1) and **Current Appointment Auth Nbr 2** (current appointment authorize number 2)	CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire.
Benefit Record Number and **Severance Pay Previous Weeks**	For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).
Special Employment Program	Indicate the special employment program: *Not Applicable, Other, Presidential Management Intern, SES Candidate Development,* or *Veteran's Readjustment Program.*

Appointment Limits

Field or Control	***Description***
Amount, Hours, and **Days**	Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Employment Data 2 Page

Use the Employment Data 2 page (GVT_EMPLOYMENT3) to enter additional employment data including union, probation, RIF, tenure, and security data.

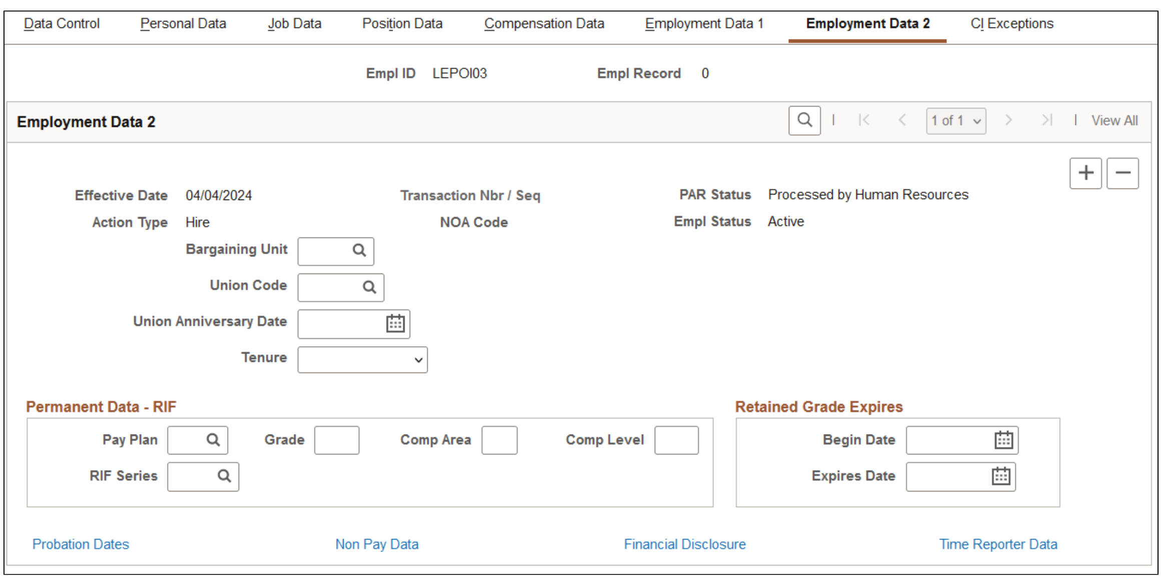
Also record the retained grade information.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add.** Select the Employment Data 2 page.

This example illustrates the fields and controls on the Employment Data 2 page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Bargaining Unit	Select a code representing the bargaining unit to which the employee belongs.
Union Code	If your new employee belongs to a union, select the appropriate union code.

Field or Control	*Description*
Union Anniversary Date	If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.
Tenure	Indicate the type of tenure.

Retained Grade Expires

Field or Control	*Description*
Begin Date and **Expires Date**	Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

Field or Control	*Description*
Pay Plan/Grade	Enter the employee's pay plan and pay grade.
Comp/Area Level	Enter the employee's compensation area and level.
RIF Series	Select the employee's RIF series.

Links

Field or Control	*Description*
Probation Dates	Click to access the Federal Probation Dates page and enter information related to probation periods.
Non Pay Data	Click to access the Non Pay Data page and enter information related to a status of non-pay.
Financial Disclosure	Click to access the Financial Disclosure page and enter information related to the employee's financial disclosure requirement.

Field or Control	***Description***
Time Reporter Data	Click to review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Time and Labor, the link is unavailable.

Related Links

Understanding Automatic Action Processing

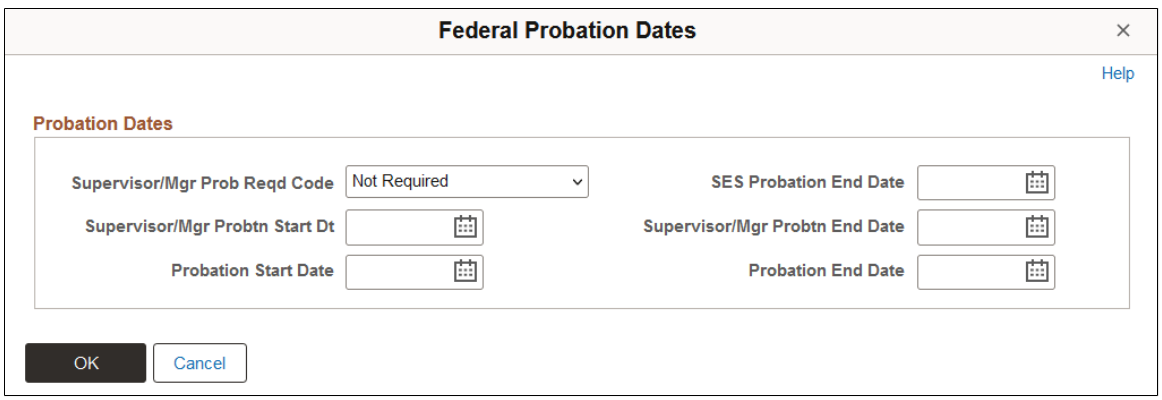
Federal Probation Dates Page

Use the Federal Probation Dates page (GVT_EMPL_PROB_SEC) to document any probation start and end dates that apply to this person.

Navigation:

Click **Probation Dates** on the Employee Data 2 page.

This example illustrates the fields and controls on the Federal Probation Dates page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Supervisor/Mgr Probtn Req Cd (supervisor manager probation required code)	Identifies whether a supervisory/managerial probationary period is required, served, or waived.
SES Probation End Date (Senior Executive Service probation end date)	Enter the applicable probation end date.
Supervisor/Mgr Probtn Start Dt (supervisor/manager probation start date)	The starting date for the supervisory/managerial probationary period, or for the SES probationary period.
Supervisor/Mgr Probtn End Dt (supervisor/manager probation end date)	Enter the applicable probation end date.

Field or Control	Description
Probation Start Date	Identifies whether the employee's appointment is subject to completion of a one year probationary (or trial) period and to show the commencing date of the probationary period.
Probation End Date	Enter the applicable probation end date.

Non - Pay Data Page

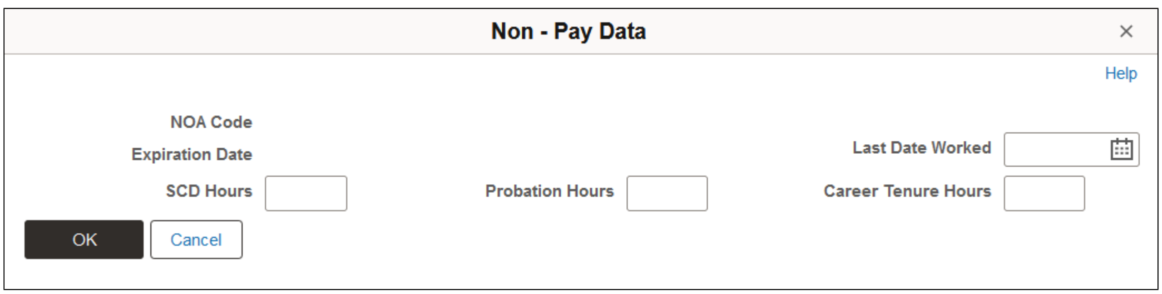
Use the Non - Pay Data page (GVT_NONPAY_SEC) to track information related to a status of nonpay.

Information on this page affects FEHB eligibility and FEGLI.

Navigation:

Click **Non Pay Data** link on the Employment Data 2 page.

This example illustrates the fields and controls on the Non - Pay Data page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
Expiration Date	The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	Enter the date last worked prior to being placed in a nonpay status.
SCD Hours, Probation Hours, and **Career Tenure Hours**	Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

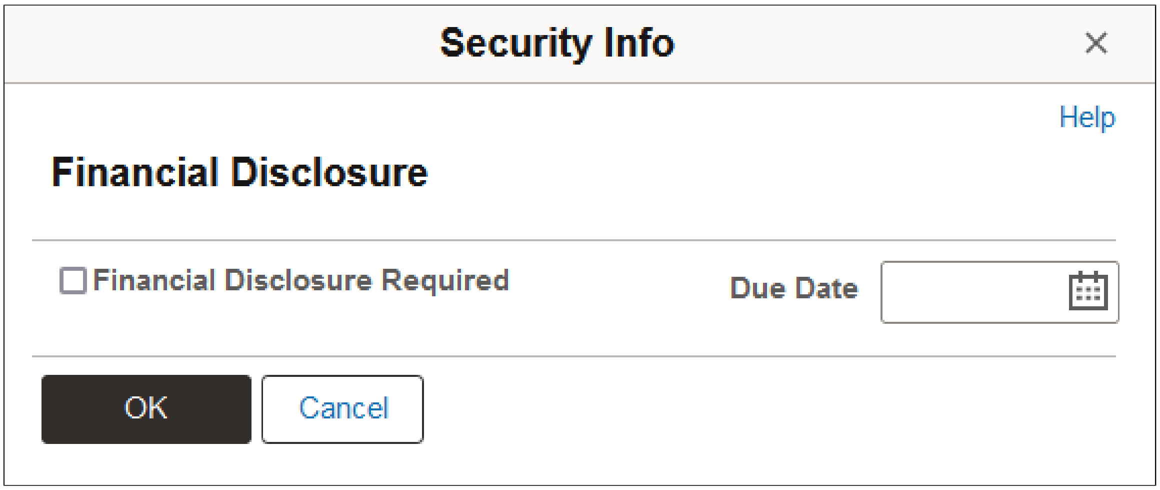
Financial Disclosure Page

Use the Financial Disclosure page (GVT_SECURTY_SEC) to indicate if financial disclosure is required and the due date.

Navigation:

Click **Financial Disclosure** link on the Employment Data 2 page.

This example illustrates the fields and controls on the Financial Disclosure page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Financial Disclosure Required and **Due Date**	If a financial disclosure is required, select this check box, and enter the due date for receipt.

Related Links

"(USF) Setting Up Position Titles" (PeopleSoft Human Resources Manage Positions)
"Creating Positions" (PeopleSoft Human Resources Manage Positions)
"Classifying Jobs" (Application Fundamentals)

CI Exceptions Page

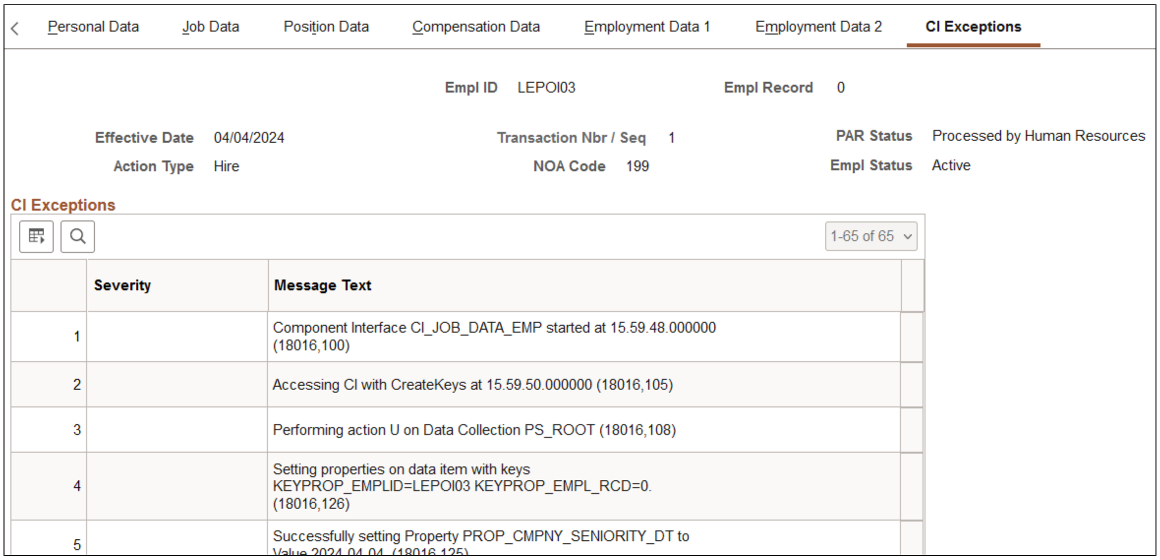
Use the CI Exceptions page (GVT_PAR_CI_MSG) to display the warning messages generated during the hire process after the transaction has been successfully saved.

Navigation:

Workforce Administration > **Job Information** > **Add Employment Instance USF** > **Add Employment Instance USF.**

Enter a **Person ID** and click **Add** then select the CI Exceptions page.

This example illustrates the fields and controls on the CI Exceptions page.



After you insert your personnel action, and have completed it to the best of your knowledge, update the PAR status to *PRO* (processed), and click the **Save**button. The system updates all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates. Should the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error and click **Save** again.

Should the CIs encounter any warning messages, the update will continue while the warning messages are displayed for you in the CI Exceptions page after the transaction has been successfully saved. These warnings are relevant to the processed transaction and will be automatically deleted after another personnel action is processed. It is good practice to note the warnings and contact your PeopleSoft Technical Administrator to help resolve them. The CI Exceptions page displays an auto-generated step-by-step documentation of what the CIs are executing which provides valuable insight into the back-end technology used in the Federal product.

Assigning Employees to Positions

If you organizing part or all of PeopleSoft Human Resources by position (using PeopleSoft Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you're not using PeopleSoft Human Resources Manage Positions, you can also use position numbers but the system won't process position-related data.

Related Links

"Understanding Positions" (PeopleSoft Human Resources Manage Positions)

Hiring Job Applicants

You can initiate the hire process from the Recruiting component. After an applicant is selected you can take the action of "Prepare for Hire" to submit the hire request. The hire transaction is completed using the Manage Hires transaction in the Workforce Administration component. Both Recruiting and Template-Based Hire use the Manage Hires page.

See Using Smart HR Templates and Transactions.

See “Hiring Applicants” (PeopleSoft Talent Acquisition Manager).

Related Links

PeopleSoft Talent Acquisition Manager

Printing Appointment Affidavits and Preliminary Employment Data Forms

This topic lists the pages used to run the Appointment Affidavits (FGSF61) and Request for Prel Employ Data (request for preliminary employment data) (FGSF755) reports.

Pages Used to Print the Forms

Page Name	***Definition Name***	***Usage***
Appointment Affidavits USF Page	RUNCTL_FGSF61	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.
Preliminary Employee Report Page	RUN_CNTL_FGSF75	Produces a Request for Preliminary Employment Data form.

Chapter 14

Managing Business Partners

Working with the Manage Business Partners Navigation Collection Using Fluid

This topic lists the pages that business partner administrators can access from a single location in the PeopleSoft Fluid User Interface to perform business partner-related tasks.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Work with the Manage Business Partners Navigation Collection Using Fluid

Page Name	***Definition Name***	***Usage***
Manage Business Partners Tile	HC_HRBP_NAV_COL_FL (This is the cref for this tile)	Access frequently-used administrative components used to create business partner teams.
View Teams (Summary) Page	HRBP_SEL_TEAM_FL	View a list of business partner teams to which you are an owner or lead and given authorization.
View Teams (Detail) Page	HRBP_TM_MEM_FL	View or perform self-service transactions for members of a business partner team to which you are an owner or lead given authorization.
“Group Build Criteria Page” (Application Fundamentals)	GB_GRP_CRIT1_TBL	Create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.
Group Build Definition • “Group Profile Page” (Application Fundamentals) • “Group Definition Page” (Application Fundamentals)	GB_GRP_DEF1_TBL GB_GRP_DEF2_TBL	Create a group profile. Specify the records, fields, and field values to define a group or refine a group criteria.

Page Name	***Definition Name***	***Usage***
"Secure Group Build by Group Page" (Application Fundamentals)	GB_GRP_SEC_TBL	Set up security by group. Specify the users who have security access to the selected group ID and the components that the user can access for the group.
Group Overlapping Report Page	RUNCTL_GBP001	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups. See also "Viewing Group Results and Reports" (Application Fundamentals).
Group Build Membership Page	RUNCTL_GBP002	Run the Group Membership report (GBP002). This report lists the members of selected groups. See also "Viewing Group Results and Reports" (Application Fundamentals).
Matrix Types (see Setup Matrix Types Page)	HRMH_MTRX_TYPE_DEF	Maintain matrix categories and identify the HR actions a member of this type of team can perform.
Matrix Teams • Matrix Team Page • Action Assignment Page	HRMH_MATRIX_DEFN HRMH_TRAN_ASSIGN	Define matrix team details such as the matrix ID, effective date, status, and description. Create your own or use an existing reporting relationship for the team Associate Manager Self-Service transactions to a matrix owner or other managers or leads that are part of the matrix reporting relationship.
Configure Business Partner Page	HRBP_CONFIG_TBL	Identify a matrix team as a business partner team and define the business partner type and display options.
Alternate Team Contact Page	HRBP_ALT_CONTACT	Enter alternate contact information for business partner teams.
View Overlapping Members Page	HRBP_MBR_OVRLAP_FL	Identify workers that report to more than one business partner team of the same type.
Configure Partner Types • Approval by Partners Page • Display Partner Information Page	HRBP_APPR_DEFN HRBP_DISPLAY_DEFN	Indicate the self service transactions a business partner can approve. You will also use this component to specify which pages should show the user's business partner contact information.

Manage Business Partners Tile

Administrators use the Manage Business Partners tile to access a variety of frequently-used administrative components used to create business partner teams.

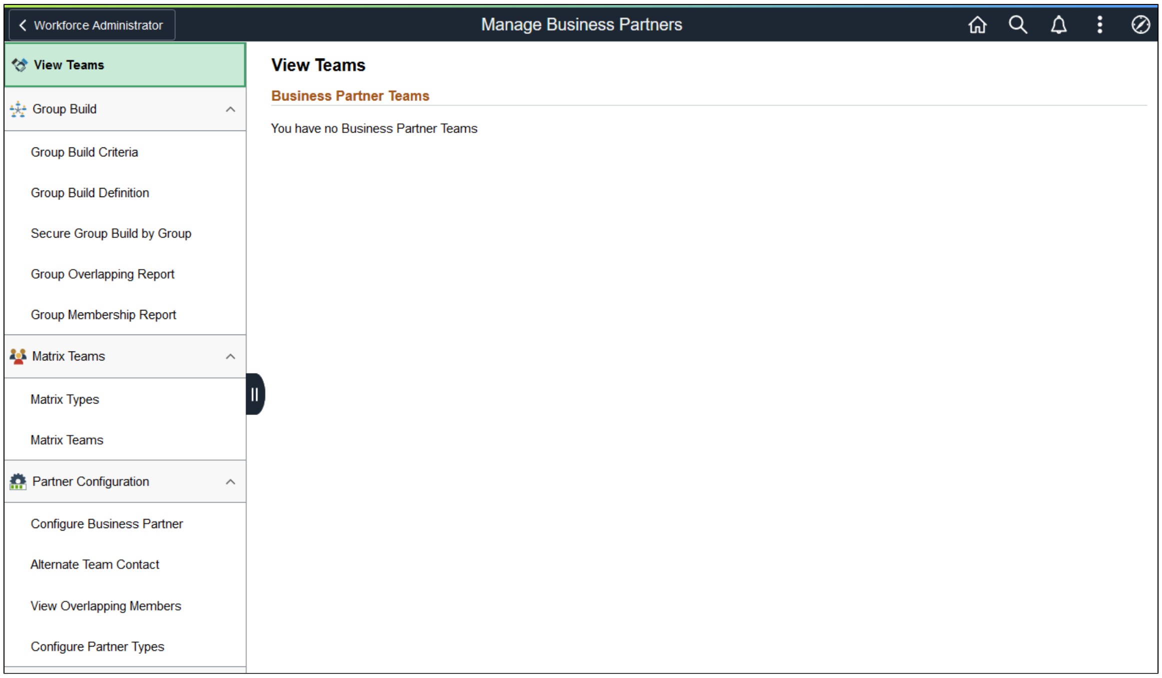
Navigation:

The Manage Business Partners tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

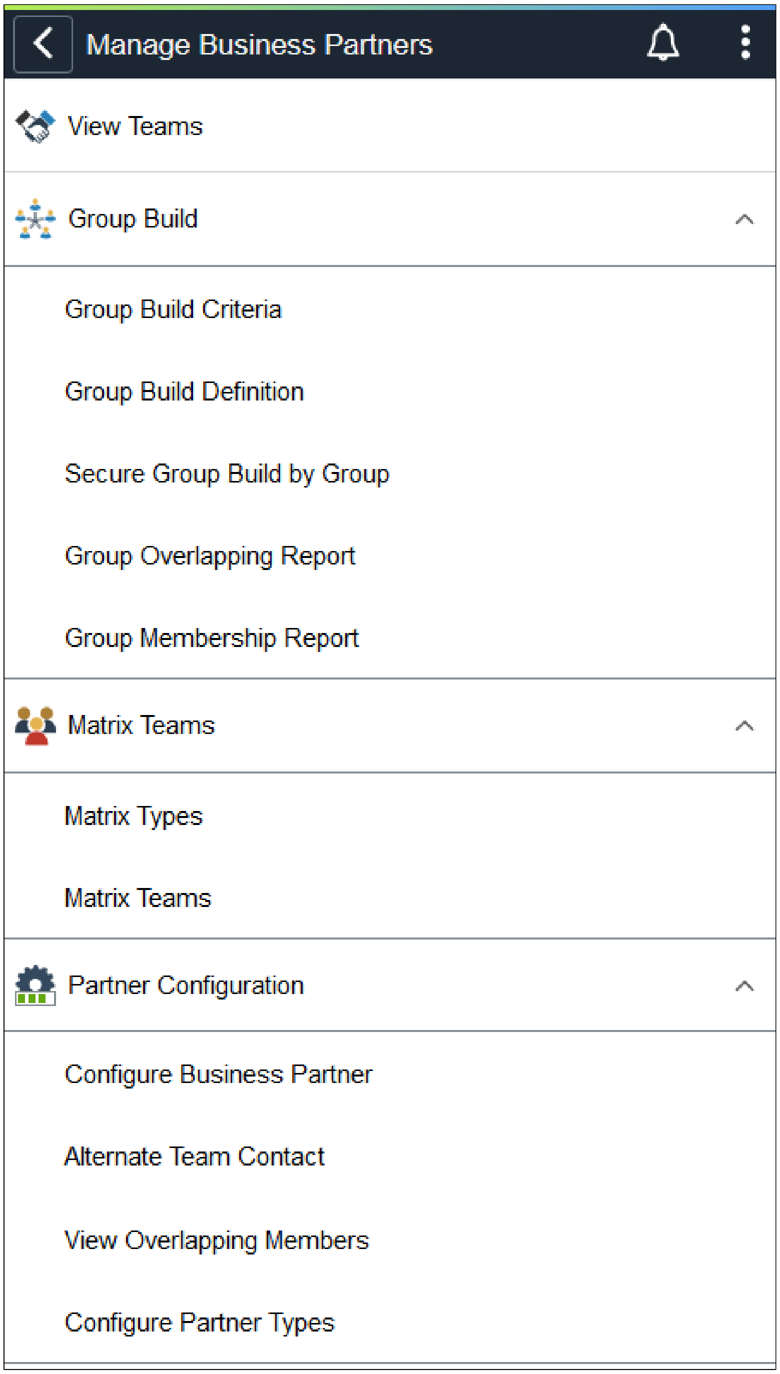
This example illustrates the fields and controls on the Manage Business Partners tile. You can find definitions for the fields and controls later on this page.

Click the Manage Business Partners tile to access the Manage Business Partners navigation collection.

This example illustrates the Manage Business Partners application start page for a large form factor device.



This example illustrates the Manage Business Partners application start page for a smartphone.



This Manage Business Partners application start page is a navigation collection that enables administrators to access frequently-used components to create and maintain business partners from one location.

The application start page lists the components collected under these categories:

- View Teams
- Group Build
- Matrix Teams

- Partner Configuration

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

When using a large form factor device, the main panel displays the component selected in the left panel navigation.

For small form factor devices, the application start page displays the categories and components. Select a component item to have the system take you to that component. Use the back button to return to the Manage Business Partners application start page to select a new component.

Configuring Business Partners

Business partner teams use matrix teams to identify an HR or company representative and the individuals for whom the representative is responsible. When configured to do so, the business partner contact information is available on the Business Partner section or page of Company Directory or Personal Details to the worker.

Administrators can also add business partner information to other pages in the system or grant the business partner approval authority for specific transactions for their team members.

To configure business partner teams, use the Alternate Team Contact (HRBP_ALT_CONTACT), Configure Business Partner (HRBP_CONFIG_TBL), View Overlapping Members (HRBP_MBR_OVRLAP_FL), and Configure Partner Types (HRBP_TYPE_CONFIG) components.

These videos demonstrate the HR Business Partners feature:

Video: Image Highlights, PeopleSoft HCM Update Image 31: HR Business Partners

Video: Image Highlights, PeopleSoft HCM Update Image 32: HR Business Partner Enhancements

This topic discusses how to configure business partner teams.

Related Links

Profile - Business Partners Page
(Smartphone) Profile Page
“Business Partners Page” (PeopleSoft eProfile)

Pages Used to Configure Business Partners

Page Name	***Definition Name***	***Usage***
Alternate Team Contact Page	HRBP_ALT_CONTACT	Enter alternate contact information for business partner teams.
Configure Business Partner Page	HRBP_CONFIG_TBL	Classify a matrix team as a business partner team and define the business partner type and display options.

Page Name	***Definition Name***	***Usage***
View Overlapping Members Page	HRBP_MBR_OVRLAP_FL	Identify workers that report to more than one business partner team of the same type.
Approval by Partners Page	HRBP_APPR_DEFN	Indicate the self service transactions a business partner can approve.
Display Partner Information Page	HRBP_DISPLAY_DEFN	Specify which pages should show the user's business partner contact information.

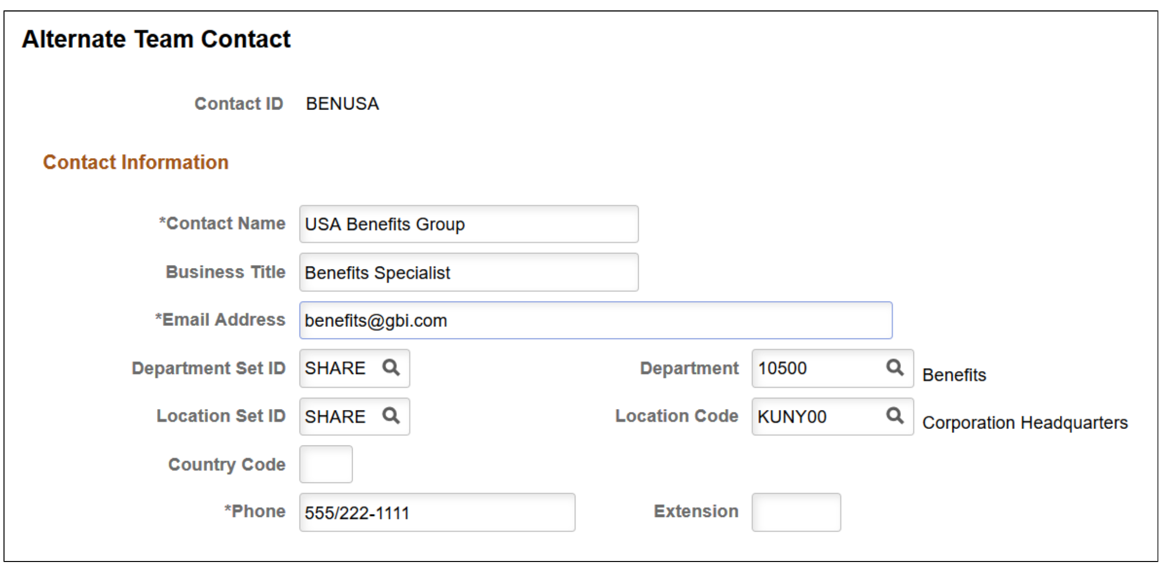
Alternate Team Contact Page

Use the Alternate Team Contact page (HRBP_ALT_CONTACT) to enter alternate contact information for business partner teams.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Manage Business Partners Tile, select Partner Configuration, then select the Alternate Team Contact page item tab in the left panel.
- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Business Partners** > **Alternate Team Contact** > **Alternate Team Contact**

This example illustrates the fields and controls on the Alternate Team Contact page.



Use this page to enter contact information for a business partner team. When configured to do so, the Business Partner section or page will display this contact information in either the Company Directory or Personal Details for the team members.

To set up the business partner content to display alternate contact information to team members, use the Configure Business Partner Page.

Related Links

Profile - Business Partners Page
(Smartphone) Profile Page
"Business Partners Page" (PeopleSoft eProfile)

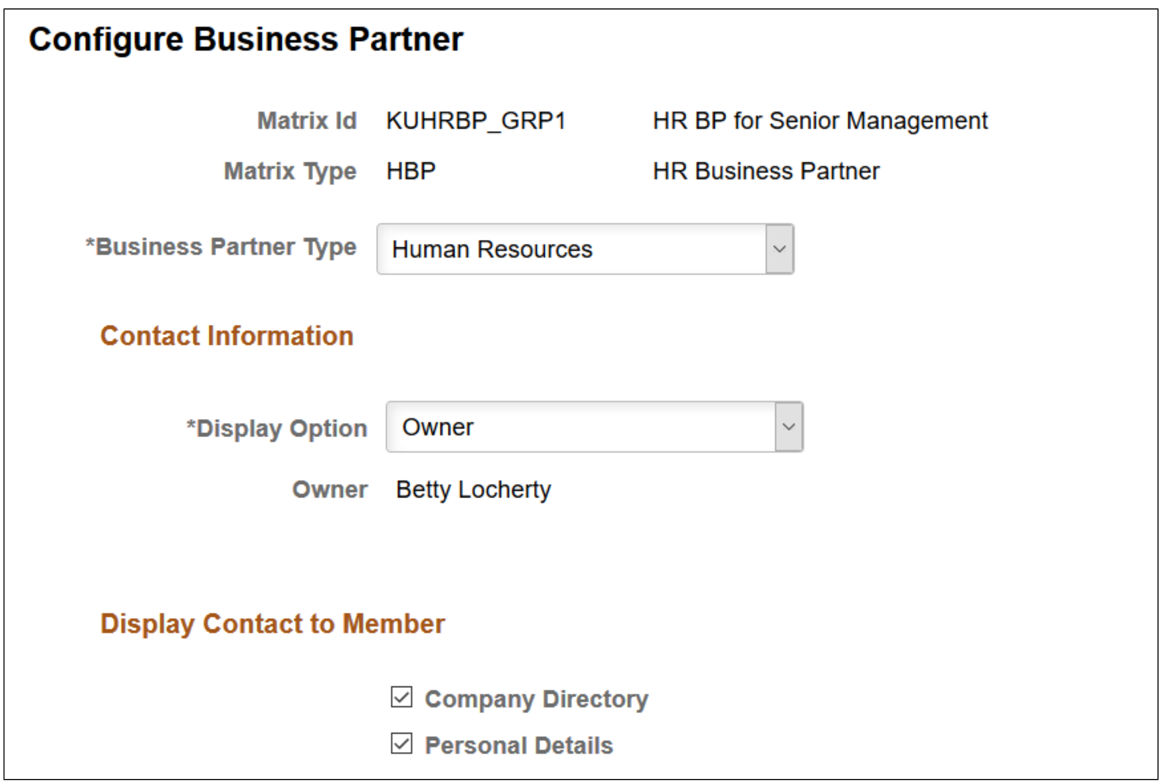
Configure Business Partner Page

Use the Configure Business Partner page (HRBP_CONFIG_TBL) to classify a matrix team as a business partner team and define the business partner type and display options.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Manage Business Partners Tile, select Partner Configuration, then select the Configure Business Partner page item tab in the left panel.
- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Business Partners** > **Configure Business Partner** > **Configure Business Partner**

This example illustrates the fields and controls on the Configure Business Partner page.



Use this page to identify a matrix team as a business partner team and make it available to view on the Business Partner sections and pages in the Company Directory and Personal Details components. This will also appear on the View Team pages for the owner. Setting up information on this page is what enables the Business Partner pages and sections.

Note: Business partner teams will display under the Company Directory, Other Teams - <Team Name> Page for the owner as a matrix team. Owners will not see a business partner team under the Business Partner sections or pages of Company Directory or Personal Details.

Field or Control	Description
Matrix Id and **Matrix Type**	Displays the ID and matrix category of the matrix team. Matrix teams and business partner teams have a one-to-one relationship. **Note:** If a matrix team is unavailable for creating a new business partner team, check to see if the matrix team is active or if a business partner team has already been created for this matrix team. To inactivate a business partner team, you will need to inactivate the matrix team. See Managing Matrix Teams as an Administrator.
Business Partner Type	Select the type of business partner team this represents. Options include: • *Absence Management* • *Benefits* • *Human Resources* • *Other* • *Payroll* • *Time and Labor*

Contact Information

Use this section to identify what contact information should be available.

Field or Control	***Description***
Display Option	Select how you want to display the business partner contact information to individuals or owner. Options are: • *Alternate Team Contact*: Displays alternate contact details, such as generic department contact information or a third party. • *None*: Hides this team on the Business Partner pages and sections. When selected, the team will still be available for the team owner on the View Teams (Summary) Page. • *Owner*: Displays the contact information for the owner of this team.
Contact ID	This field appears when you select the *Alternate Team Contact* option in the **Display Option** field. Enter the alternate contact ID that should display for this team. Define this contact information on the View Teams (Summary) Page.
Owner	This field appears when you select the *Owner* option in the **Display Option** field. Displays the owner name for the matrix team as defined on the Matrix Team Page for this matrix team. **Important!** When a team owner has terminated employment with the organization, ensure that all processes are run to removed a person from the direct report, row security, and Company Directory. You will also need to identify the new owner of the matrix team. If you do not update the matrix owner after running these process, the Business Partner pages will continue to show the old owner but will display an error message that this profile is not available.

Display Contact to Member

Use this section to identify if you want an individual's business partner contact information to appear on the following self service pages:

Field or Control	Description
Company Directory	Select to have the Company Directory display the business partner information on the Profile - Business Partners Page or (Smartphone) Profile Page, Business Partners section when the person is associated with this business partner team. The Company Directory will display this information to any user accessing the member's profile. Deselect to hide this business partner information in the Company Directory. If there is no business partner information to display to the user, the system will hide the Business Partners page (or section) within the Company Directory.
Personal Details	Select to have the business partner information appear on the "Business Partners Page" (PeopleSoft eProfile) from the following components: • Personal Details component • Business Partners tile (from the OnBoarding Dashboard). Deselect to hide this business partner information in Personal Details and reduce the count of partners on the Business Partners Tile (available from the OnBoarding dashboard). If there is no business partner information to display to the user, the system will hide the Business Partners page within Person Details and the tile on the OnBoarding dashboard will display that the user has no business partners.

Related Links

Working with the Manage Business Partners Navigation Collection Using Fluid

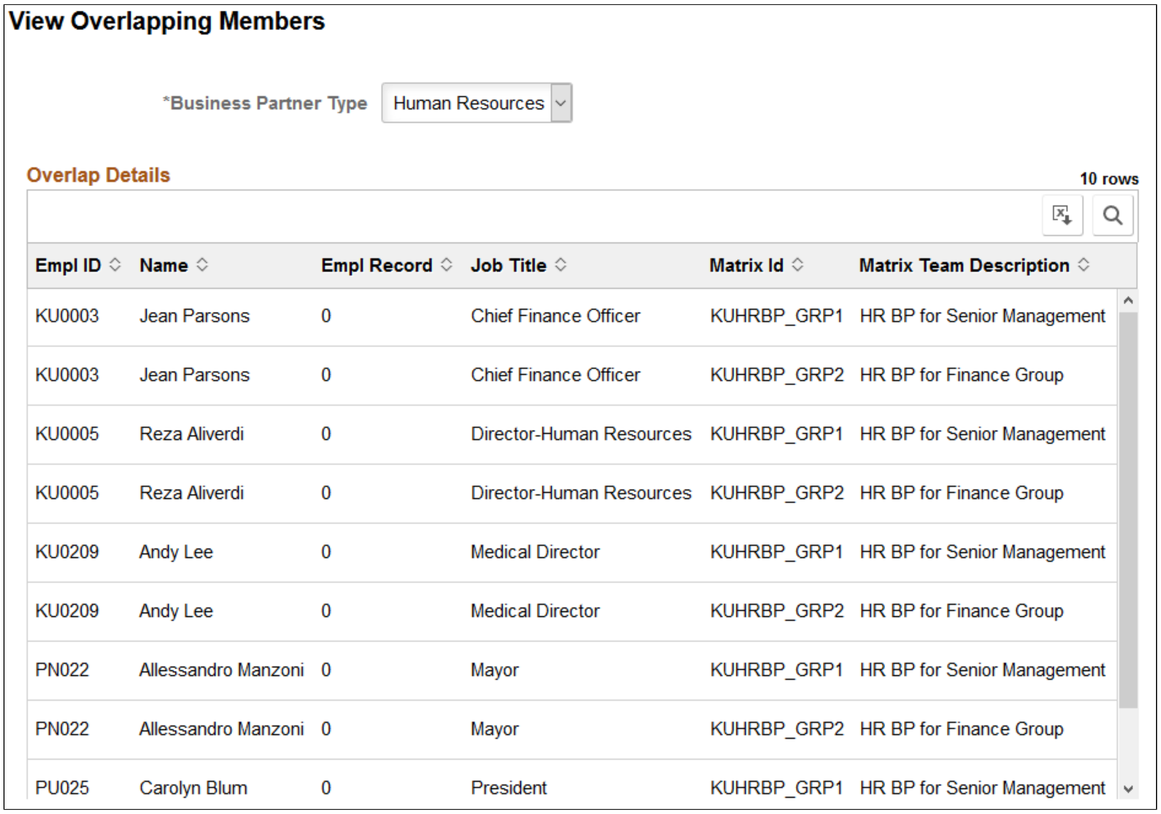
View Overlapping Members Page

Use the View Overlapping Members page (HRBP_MBR_OVRLAP_FL) to identify workers that report to more than one business partner team of the same type.

Navigation:

From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Manage Business Partners Tile, select Partner Configuration, then select the View Overlapping Members page item tab in the left panel.

This example illustrates the fields and controls on the View Overlapping Members page.



Typically a worker will have one business partner contact per business type, such as one for Human Resources and maybe another for Benefits. Use this page to view a list of those persons that belong to more than one matrix team of the same type. For example, the preceding screen shot shows those individuals that are on more than one *Human Resources* business partner team.

This enables you to identify and modify matrix team members that should not be on multiple teams. This page will display up to 300 rows.

Field or Control	***Description***
Business Partner Type	Select the type of business partner team for which you want to view duplicate members. This field will present only those business partner types associated with matrix teams on the Configure Business Partner Page.

Related Links

Working with the Manage Business Partners Navigation Collection Using Fluid

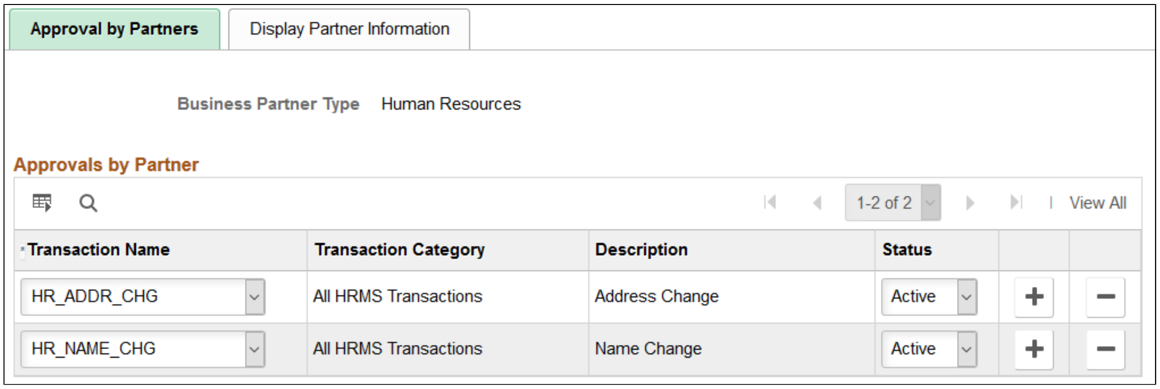
Approval by Partners Page

Use the Approval by Partners page (HRBP_APPR_DEFN) to indicate the self service transactions a business partner can approve.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Manage Business Partners Tile, select Partner Configuration, then select the Configure Business Partner page item tab in the left panel.
- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Business Partners** > **Configure Business Partner** > **Approval by Partner**

This example illustrates the fields and controls on the Approval by Partners page.



The information you set up on this page is keyed by business partner type. The system checks to see if the logged in user is a member of a business partner team of this same type, and if so, routes the approval request to the contact defined on the Configure Business Partner Page.

Note: You will need to set up the approval process to use the correct user list.

Field or Control	***Description***
Business Partner Type	Displays the type of business partner to which you want to grant transaction approval. Values include: • *Absence Management* • *Benefits* • *Human Resources* • *Other* • *Payroll* • *Time and Labor*

Field or Control	***Description***
Transaction Name	Select the self service transactions the business partner can approve. Valid values are those self service transactions registered in the Approval Framework (**Set Up HCM** > **Common Definitions** > **Self Service** > **Workflow Transactions**). **Note:** You will need to set up the Approval Framework to run the delivered user lists. The following are the delivered business partner user lists: • *By Business Partner Owner*: routes the approval request to the logged in user's business partner owner. For example, when an employee submits a request for approval via an Employee Self Service transaction, the system sends the request to that user's business partner. • *By Business Partner Employee*: routes the approval request to the business partner owner of the employee on whose behalf you are submitting the request. For example, when a manager submits a request for approval for one of his or her employees via a Manager Self Service transaction, the system sends the request to the employee's business partner, not the logged in manager submitting the request. The user lists reference the approval transactions for the business partner type and use the configuration settings for this business partner type to determine the contact for the approval request. For more information on Approvals, see the "Using Workflow with Self-Service Transactions" (Application Fundamentals) and "Registering Approval Transactions" (Application Fundamentals) topics.
Status	Indicate if this transaction is active or inactive for the business partner to perform approvals.

Related Links

"Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (Application Fundamentals)

Display Partner Information Page

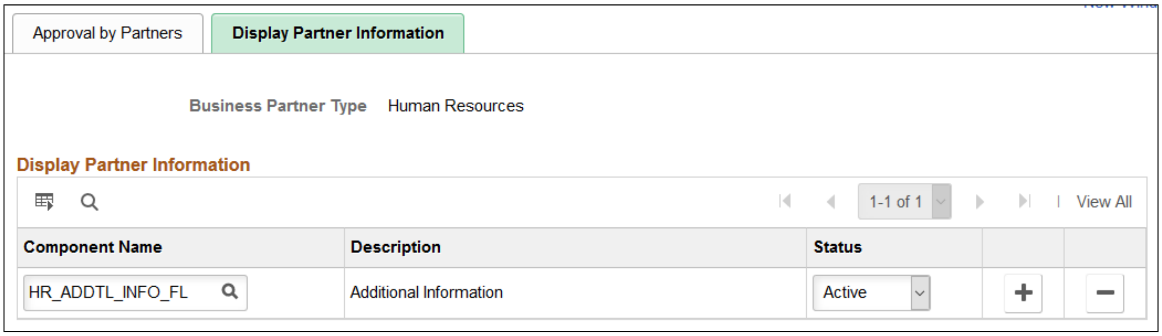
Use the Display Partner Information page (HRBP_DISPLAY_DEFN) to specify which pages should show the user's business partner contact information.

Navigation:

- From the "Workforce Administrator Homepage" (Application Fundamentals) in fluid, click the Manage Business Partners Tile, then select Partner Configuration, then select the Configure Business Partner page item tab in the left panel.

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Business Partners** > **Configure Business Partner** > **Configure Business Partner**

This example illustrates the fields and controls on the Display Partner Information page.



The information you set up on this page is keyed by business partner type. The system uses this information to determine which contact data to display to the user.

For example, in the previous screen shot scenario, when a user accesses the Personal Details - Additional Information page (*HR_ADDTL_INFO_FL*), the system references the business partner configuration (Configure Business Partner Page) for the user's team under the *Human Resources* type to determine which contact information to show.

Field or Control	***Description***
Business Partner Type	Displays the type of business partner the system should display on a page. Values include: • *Absence Management* • *Benefits* • *Human Resources* • *Other* • *Payroll* • *Time and Labor*
Component Name	Enter the component where you want to display the user's business partner information. To have the information display on the page, access the Application Designer for the component you specified on this page. Then add the subpage *HR_BUSPRTNR_SBF*. You will need to call the HRBP_UTILS:EmployeeTeams method *BusinessPartner.populateBusinessPartner()* to load the information to the subpage for the component. For the user to see the information, he or she must be a member of a matrix under the same business partner type. If the logged in user is not a member of a matrix for the business partner type, the subpage is hidden.

Field or Control	Description
Status	Indicate whether the business partner information for this component is active or inactive.

Note: The system delivers the HR_ADDTL_INFO_FL component under the *Human Resources* business partner type as part of system data. This means the user will see the business partner information under the Personal Details, “Additional Information Page” (PeopleSoft eProfile).

Viewing Business Partner Teams as an Owner or Leader

The PeopleSoft HCM application enables business partner owners and leads to access their business partner matrix teams via the following methods:

- Manage Business Partner tile, View Teams component (owner and leads).
- Company Directory, Other Teams page (owner only).
- Manage Matrix Teams tile and pages (owner only for manually built teams).

This video demonstrates the HR Business Partners feature:

Video: Image Highlights, PeopleSoft HCM Update Image 31: HR Business Partners

This topic discusses viewing business partner teams as an owner or leader through the Manage Business Partner navigation collection.

Related Links

Other Teams - <Team Name> Page
Using the PeopleSoft Fluid User Interface for Self Service Matrix Teams

Pages Used to View Business Partner Teams as an Owner or Leader

Page Name	Definition Name	Usage
View Teams (Summary) Page	HRBP_SEL_TEAM_FL	View a list of business partner teams to which you are an owner or lead and given authorization.
View Teams (Detail) Page	HRBP_TM_MEM_FL	View or perform self-service transactions for members of a business partner team to which you are an owner or lead given authorization.

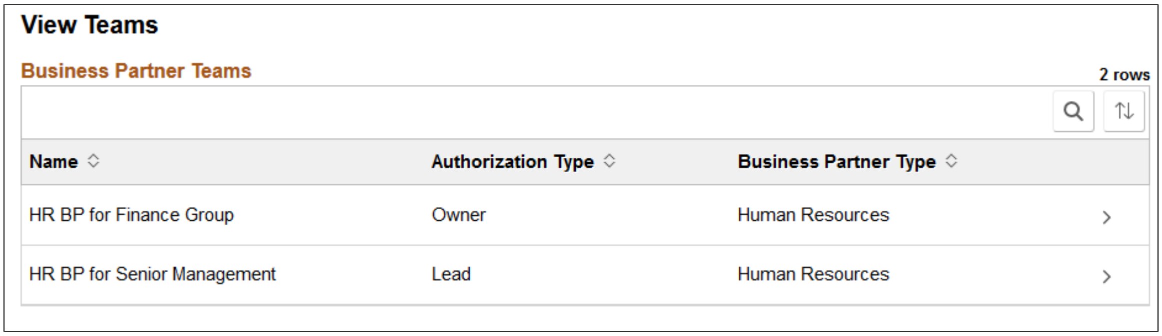
View Teams (Summary) Page

Use the View Teams (Summary) page (HRBP_SEL_TEAM_FL) to view a list of business partner teams to which you are an owner or lead and given authorization.

Navigation:

From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the Manage Business Partners Tile, then select View Teams.

This example illustrates the fields and controls on the View Teams (Summary) page.



Use this page to view and access your business partner teams to which you have been granted authorization.

Field or Control	***Description***
Name	Displays the name of the business partner team to which you are an owner or lead. Business partner teams are established for a matrix team using the Configure Business Partner Page.
Authorization Type	This column displays either *Owner* or *Lead*. It is available only when you are authorized as an owner on at least one team and authorized as a lead on another. **Note:** Owner and leads are defined and granted access using the Matrix Team component (see Managing Matrix Teams as an Administrator).
Business Partner Type	Displays the business partner type defined on the Configure Business Partner Page.

Select a row to access the View Teams (Detail) Page and view the members of the team and perform manager self-service transactions.

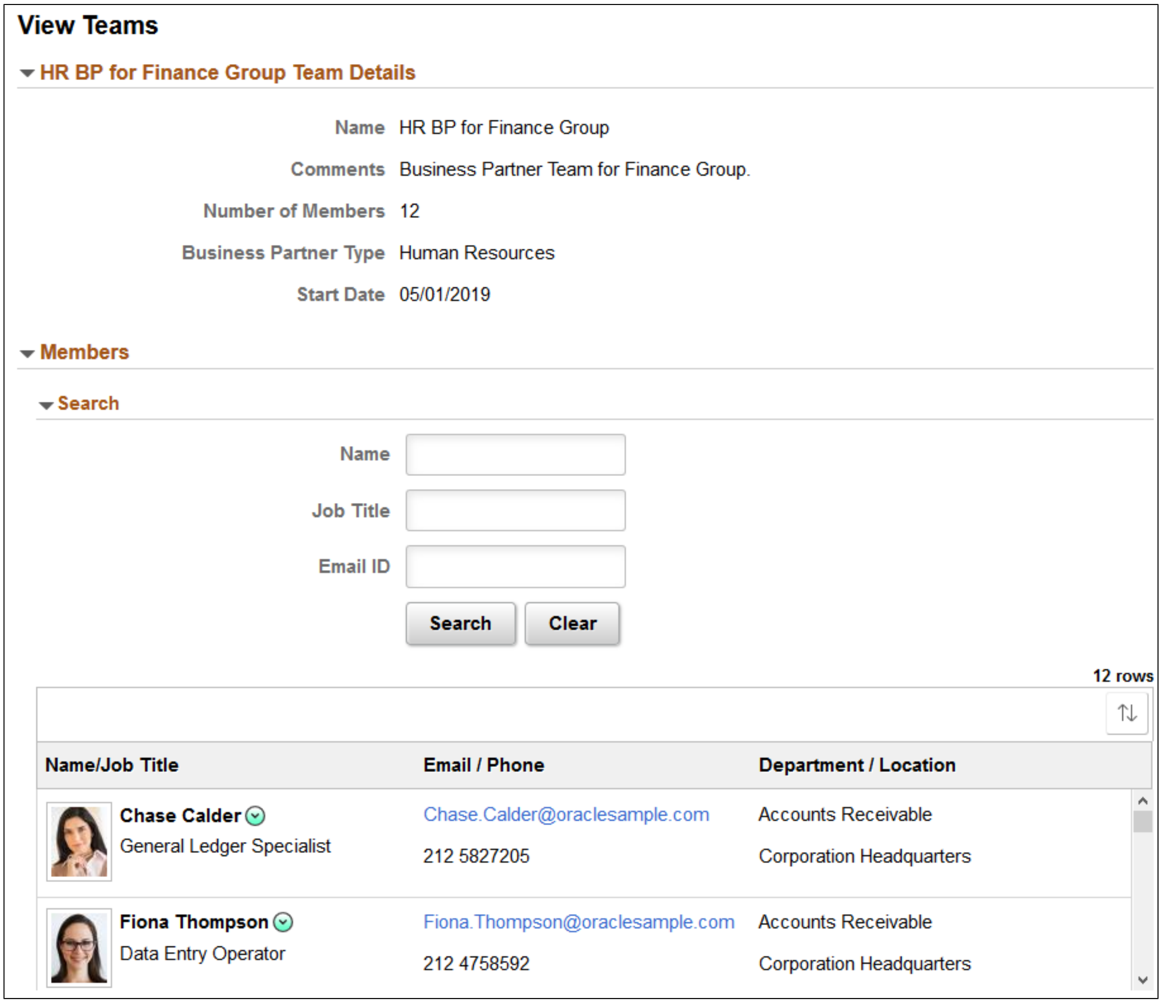
View Teams (Detail) Page

Use the View Teams (Details) page (HRBP_TM_MEM_FL) to view or perform self-service transactions for members of a business partner team to which you are an owner or lead given authorization.

Navigation:

Select a team row from the View Teams (Summary) Page.

This example illustrates the fields and controls on the View Teams (Details) page.



<Matrix Team> Details

This collapsible section displays the information about the matrix team. The Business Partner Type comes from the Configure Business Partner Page. The remaining fields are defined on the Matrix Team Page.

Field or Control	***Description***
Number of Members	When you are the owner of the team, this field displays a count of all members in the team. When you are a lead within the team, this field displays a count of the number of members to which you have access as a lead. **Note:** Owner and leads are defined and granted access using the Matrix Team component (see Managing Matrix Teams as an Administrator).

Search

Use this collapsible section to search for members of the team by name, job title, or email.

Members

Use this section to view the members of the team.

When you are the owner of the team, this section displays all members in the team.

When you are a lead within the team, this field displays the members to which you have access as a lead.

Field or Control	***Description***
Related Action icon	Select the related actions icon next to the employee's name to display a menu of manager self-service transactions. The menu provides access to the transactions defined for the matrix team on the Action Assignment Page.

Viewing Business Partner Information from the OnBoarding Dashboard

The PeopleSoft Human Resources product enables users going through the OnBoarding process quick access to their business partner contact information.

This topic describes viewing business partner Information from the OnBoarding dashboard.

Pages Used to View Business Partner Information from the OnBoarding Dashboard

Page Name	***Definition Name***	***Usage***
Business Partners Tile	HC_HR_EE_BUS_PRTNR_FL_GBL (this is the cref for this tile) HRBP_EE_TILE_FL (tile live data)	Access your business partner information, if available.
“Business Partners Page” (PeopleSoft eProfile)	HR_EE_BUS_PRTNR_FL	View your business partners and their contact information.

Business Partners Tile

Use the Business Partners tile to access your business partner information, if available.

Navigation:

Click the OnBoarding Tile on the delivered Employee Self Service fluid home page (or any other home page with the tile) to access the OnBoarding Dashboard, which contains the Business Partners tile.

Note: The Business Partners tile can only be added to the OnBoarding dashboard if the person has the *OnBoarding Employee* role.

This example illustrates the Business Partners tile.

Select this tile to access the “Business Partners Page” (PeopleSoft eProfile) and view your business partners.

Note: When you select this tile, you access the same page that is available from the Personal Details component. Availability of business partner information is based on the configuration settings.

The tile displays the number of business partners available for viewing. When there are no business partners configured for viewing, the tile will display that you have *0* partners and the Business Partners page will display that you have no business partners.

Missing or Zero Business Partners

You may have fewer than expected or no business partners to view under one of the following conditions:

- You are not associated with a business partner team, and therefore have no business partners assigned at the moment.
- You are associated with business partner teams that are not configured to display business partner information on Personal Details.

Note: Since the system displays the same page that is available from the Personal Details component, the **Personal Details** option for your team must be selected on the Configure Business Partner Page to view partner information. When this option is deselected, the tile will display that you have fewer or no partners, even if you are part of a business partner team.

Related Links

Configuring Business Partners

Chapter 15

Managing Military Information

Setting Up and Tracking Military Job Updates

To set up and track military service job updates, use the Military Approval Levels (MIL_APPRVL_LVL_DFN) and Military Order Codes (MIL_ORD_CODE_DEFN) components.

This topic discusses how to track approvals for mass or individual job updates.

Pages Used to Track Military Job Updates

Page Name	***Definition Name***	***Usage***
Approval Levels Page	MIL_APPRVL_LVL_DFN	Define military approval levels to describe the various levels used for approving orders that affect military members' Job rows. The military approval levels codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.
Order Codes Page	MIL_ORD_CODE_DEFN	Enter military order codes (such as legislative orders) that would indicate a reason for a job change. The order codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.
Employee Data Tracking MIL Page	MIL_EE_DATA_TRK	Track approvals for mass or individual job updates. When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job Data change. Changes to the job rows can be done manually or through the Mass Update process.

Employee Data Tracking MIL Page

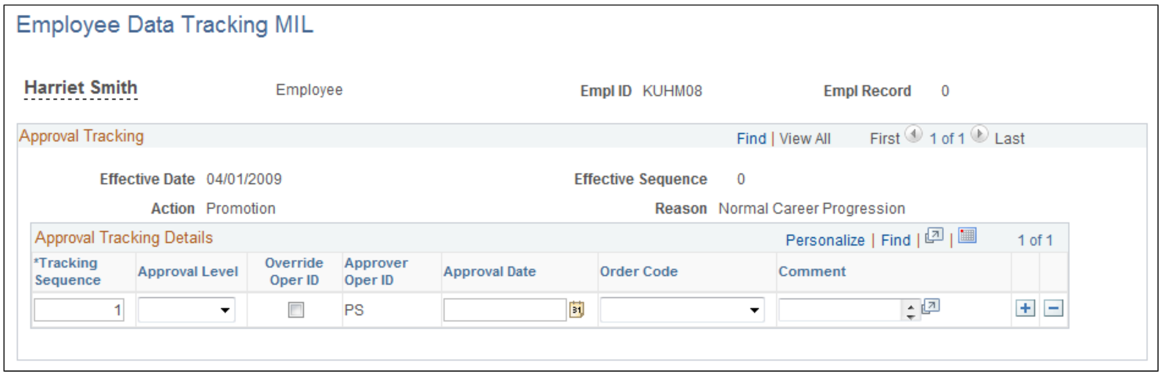
Use the Employee Data Tracking MIL page (MIL_EE_DATA_TRK) to track approvals for mass or individual job updates.

When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job Data change. Changes to the job rows can be done manually or through the Mass Update process.

Navigation:

Workforce Administration > **Job Information** > **Track Military Employee Data** > **Employee Data Tracking MIL**

This example illustrates the fields and controls on the Employee Data Tracking MIL page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Tracking Sequence	Enter a tracking sequence number.
Approval Level	Select a level, such as an initial request or final, for approving a military order. Define approval levels in the Military Approval Levels table.
Override Oper ID (override operator identification) and **Approver Oper ID** (approver operator identification)	The system displays the operator that entered the approval information. Select the **Override Oprid** check box to manually update the approving operator id.
Approval Date	Enter the date for this approval level.
Order Code	Select an order that explains the purpose of this job change. Define order codes in the Military Order Codes table.
Comment	Enter additional comments regarding this job update and approval.

Note: The Mass Update process will update this component by calling the service MassUpdateMilitaryApproval, which in turn will call the Component Interface HCR_MIL_EE_TRK_SRV.

Updating Military Ranks in Job Data and Profiles

This topic provides an overview of military rank updates in Job Data and rank tracking in Manage Profiles.

Related Links

Setting Up and Tracking Military Service Availability
Setting Up and Tracking Military Job Updates
Tracking Military Discharge Dates

Understanding Military Rank Updates in Job Data

Military rank changes are tracked in a person's Job Data record. This table lists the pages and fields that you typically update when you enter a military rank change (you may need to update additional pages and fields):

Affected Pages	***Affected Fields***	***Comments***
Work Location	**Effective Date** **Action Code:** *Data Change* **Reason Code** (if applicable) **Position Number** **Service Component** **Component Category**	All the entries on the page could change depending on what the rank change involves and the service member's job. An action code may vary too depending upon other job changes related to the rank change, such as promotion or department transfer. If you're organizing part or all of PeopleSoft Human Resources by position, military rank information does not default from the position.
Job Information	**Job Family** **Job Function** **Job Subfunction**	Update any other fields as needed.
Salary Plan	**Rank** **Rank Entry Data** **Skill Grade** **Worn Rank** **Worn Rank Type** **Salary Administration Plan** **Grade**	Rank is tied to Salary Plan and Grade. This may also involve updating compensation information on the Job Data - Compensation page.

Affected Pages	*Affected Fields*	*Comments*
Employment Information	**Engagement Date** **Early Promotion Date**	Update other fields as needed.

Understanding Rank Tracking in Manage Profiles

PeopleSoft Human Resources Manage Profiles manages the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person as well as a service member's military ranks. The profile search and compare features enable you to perform searches for profiles that match user-defined criteria and easily compare profiles.

In order to keep military rank profiles up to date with Job Data, use the Refresh Names and Profiles MIL process (MIL_NAME_BLD). The system uses the HCM Event Manager to raise an event when a change to an assignment's military rank has occurred and execute this change.

The following prerequisites must be in place prior to running the Refresh Names and Profiles MIL process:

- The Integration Broker must be active.
- In HCM Event Manager, the event *AssignmentMilitaryRankChanged* must be active.

See *PeopleSoft: Events and Notifications,* "Understanding the Events and Notifications Framework"

See *PeopleSoft HR: Manage Profiles.*

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Page Used to Synchronize Ranks in Job Data with Manage Profiles

Page Name	*Definition Name*	*Usage*
Refresh Names and Profiles MIL Page	MIL_REBUILD_NAMES	Run this process to rebuild the names and profiles of all the military personnel and synchronize this data with the Manage Profile records.

Managing Military Rank Change Requests

These topics provide an overview of military rank change processing and discuss how to manage military rank change requests.

Pages Used to Track Military Rank Changes

Page Name	Definition Name	Usage
Military Rank Change Page	MIL_RANK_CHNG_CNTL	Create and manage military rank change requests by entering the controlling factors for this military rank change transaction. You can also enter predefined templates to populate the authorizing organization, career manager, and notification details.
Military Rank Change - Details Page	MIL_RANK_CHNG_DTLS	Enter the proposed military rank change details.
Military Rank Change - Stakeholder Page	MIL_STKHLDR_NOTIF	Enter military rank change notification information. This page is specifically designed to capture when the approval process will begin and who will be involved. List reviewers and approvers for this rank change that will receive an electronic notification and when the system should trigger approval workflow. If prenotification has been enabled, enter a prenotification date on which these stakeholders should be notified of the rank change.
Military Rank Change - Postal Page	MIL_RANK_POSTAL	Record postal information for stakeholders that you have notified manually. Enter stakeholders that you are not notifying electronically and the date and address of where you mailed the notification.
Review Military Rank Change Page	MIL_RANK_CHNG_APPR	Approve or deny rank change requests.
Pending Approvals - Military Rank Change Page	EOAWMA_TXNHDTL_FL	Review and take action on a military rank change approval request using fluid approvals.
Rank Change Details MIL Page	HRMIL_RANKDTL_SCF	Review the details of a military rank change request.

Page Name	Definition Name	Usage
Generate Rank Change Notices Page	MIL_NOTICE_RUN_CTL	Generate service member rank change notices using XML Publisher. A report can be generated in any status, at any point in time.

Understanding Military Rank Change Processing

The overall process of issuing a military rank change can occur multiple times during a service member's career and for various reasons, such as natural progression, performance and training, and other assessment-related testing. After an organization has gone through the evaluation and selection process and have identified the candidates who should receive a rank change, the organization can use the PeopleSoft Military Rank Change process.

The PeopleSoft Military Rank Change process enables the tracking of the various states of military service member rank changes, notifying stakeholders that are involved in this business process, and generating official documentation. When a rank change transaction is completely processed, a new row is inserted into the service member's Job Data to reflect the new rank change. Through the Military Rank Change pages and process, you can:

- Enter (new, amended, or cancelled) rank changes details in a specified rank change component.
- Use templates, which would provide default values for the rank change request and cut down on the number of key strokes required when entering requests.
- Retrieve and view history, including amendments and cancellations, to all employee rank changes.
- Enter notification details to be triggered based on current or future promulgation dates.
- Work closely with stakeholders (any individual that needs to be notified of a service member's rank change) through email notification and recording their approvals or denials through the manager self service pages.
- Have the system update service member job data and profile records to reflect the new rank changes.
- Generate rank change documents.

When a rank change transaction is added (a new request, an amendment, or a cancellation) for a service member, an email notification is sent to stakeholders, the career manager and a list of other reviewers and approvers you identify in the Military Rank Change component, using the Approval Framework. This notification alerts them that the rank change process has begun and any stakeholders who have been specified as approvers will be notified that their review and approval is required for the rank change process to continue. Approvers will then approve or deny the rank change transaction in the Review Military Rank Change Page in the manager self service pages or the Pending Approvals - Military Rank Change Page if you are using the PeopleSoft Fluid User Interface approval pages. If the stakeholders approve the rank change, the system then routes the information to the candidate's unit commander for final approval. The unit commander is determined based on the access type on the Military Processing Definition setup page.

See “Configuring Direct Reports Functionality” (Application Fundamentals).

See “Setting Up Access to Direct Reports Data” (Application Fundamentals).

The Career Manager can monitor rank change approvals and denials by reviewing the status monitor on the Review Military Rank Change Page, or Pending Approvals - Military Rank Change Page if using fluid. When a new or amended rank change has been approved, the system will insert and record this rank change row in the Job Data component through the MIL_UDJOB_AE Application Engine. The date this happens is based on the **Application Date** field value defined in Military Rank Change component for this transaction. The Career Manager should review the status monitor on the Review Military Rank Change page for denials and insert a new row in the Military Rank Change component indicating a cancellation of the rank change transaction. This process enables you to keep a record of all military rank change propositions, amendments, and cancellations without inserting numerous rows into Job Data.

If the Military Processing Definition page is set up to enable prenotification, the system will provide a prenotification message to the stakeholders as a final reminder that this rank change is going to happen within a specified period.

You can also create rank change notices utilizing XML Publisher for the service members you select.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Military Rank Change Processes

The Military Rank Change process uses these processes:

- Launch AWE for Mil Rank Change (MIL_AWE_AE)

  Launches the approval process. This application engine checks for all the rank changes that needs an approval and whose **Start Approvals On** date in the Military Rank Change component is less than or equal to the current date.

- Prenotifications for Mil Rank (MIL_NOTFY_AE)

  Sends out the prenotification emails based on the **Prenotification Date** field in the Military Rank Change component.

- Update Job Data for Mil Rank (MIL_UDJOB_AE)

  Updates Job Data with the rank changes that have been approved. This application engine checks for all the approved rank changes that are not yet applied to the database and that have an **Application Date** value in the Military Rank Change component of less than or equal to the current date. This updates Job Data with an effective date that matches the **Application Date** value.

- Military Rank Change Notices (MILRNKNOT)

  Generates the rank change notices. You run these notices by navigating to **Workforce Administration** > **Job Information** > **Reports** > **Generate Rank Change Notices.** Identify the rank change notifications you wish to print and click **Run** to initiate the MILRNKNOT XML

Publisher process, which calls the MILRNKNOT Application Engine process. Separate files are generated for each employee and the files are stored in the report folders of the respective server.

Note: Run the approval, prenotification, and job update application engines by navigating to **PeopleTools** > **Process Scheduler** > **System Process Requests** and selecting the process you need to run. You can also trigger these processes to run automatically through the Process Scheduler by setting up a recurrence that is linked to the processes in order run them daily without additional manual intervention.

See *PeopleTools: PeopleSoft Process Scheduler,* "Defining PeopleSoft Process Scheduler Support Information," Defining Recurrence Definitions

Prerequisites

In order for you to use the Military Rank Change feature, you must ensure the following items have been setup:

- Military Rank functionality is enabled and the military rank setup tables have been defined.
- User profiles and roles have been set up with email and worklist notification preferences.
- Approval Framework has been set up for notification.
- Workflow with email is enabled.
- Event Manager has been configured.
- Integration Broker is running correctly.
- XML Publisher has been set up to create official document generation.

Related Links

Setting Up Military Rank Change Notification and Documentation

Military Rank Change Page

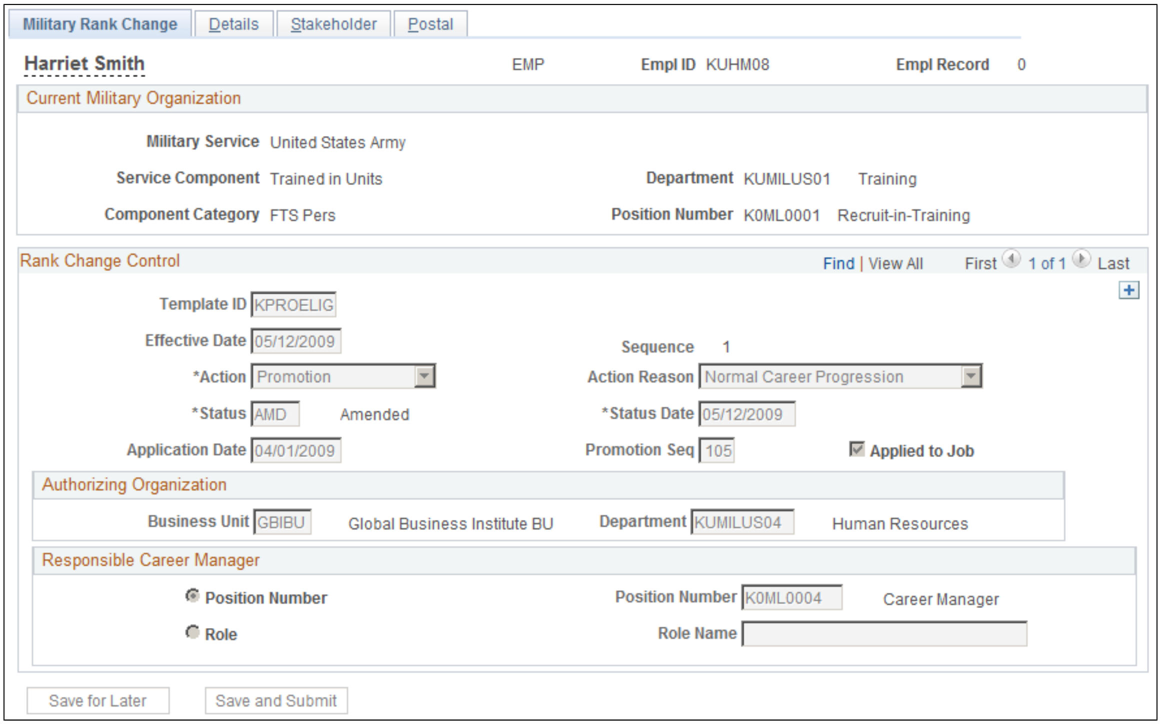
Use the Military Rank Change page (MIL_RANK_CHNG_CNTL) to create and manage military rank change requests by entering the controlling factors for this military rank change transaction.

You can also enter predefined templates to populate the authorizing organization, career manager, and notification details.

Navigation:

Workforce Administration > **Job Information** > **Military Rank Change** > **Military Rank Change**

This example illustrates the fields and controls on the Military Rank Change page. You can find definitions for the fields and controls later on this page.



This page displays the employment and current military organization information that is recorded in the Job Data component for this person.

Note: To have the system display the worn rank in front of the employee's name at the top of the military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the names.

See *PeopleSoft: Events and Notifications*

Rank Change Control

Field or Control	***Description***
Template ID	Select a rank change template to populate the component with predefined fields from the Military Rank Change Template component, such as the **Action, Reason, Status, Business Unit, Department, Career Manager,** and role notification fields. This field is optional.
Effective Date	Enter the date the person was selected for a rank change. This field, along with the **EmplID, Empl Record, Sequence,** and **Action** fields, uniquely identify this transaction row.

Field or Control	***Description***
Sequence	Defaults to 1 for a new effective-dated row and automatically increments by one when a new row is inserted in the scroll area for the same effective date.
Action	Select a valid action associated with the Military Rank Change process. Valid rank change actions are defined in the Military Rank Change Status component for PeopleSoft actions. The system will use this value in the **Action** field when this rank change is inserted into Job Data.
Action Reason	Select a valid action reason for the service member's rank change. Values are defined in the PeopleSoft Action Reason table. The system will use this value in the **Action Reason** field when this rank change is inserted into Job Data. This field is an optional.
Status and **Status Date**	Enter a disposition status of this rank change and the date of this disposition status. Values for this field may include *NEW, AMD* (rank change amendment), *CNA* (administrator canceled rank change), or *CNC* (rank change commander cancellation), depending up how the disposition status was set up in the Military Rank Change Status component.
Application Date	Enter the date this rank change should be inserted into Job Data, if known. Since this date is not always known when the rank change for the service member is first defined, you can enter this date at a later time. However, this field is required in order for the row to be processed and inserted to the service member's Job Data. **Note:** In order for the system to write this rank change to Job Data, the **Apply Row to Job Data** check box must be selected for the action's **Status** value on the Rank Change Status MIL page, approvals for military rank changes must be enabled, and the rank change must be approved. See Rank Change Status MIL Page.
Promotion Seq (promotion sequence)	Indicate the order that a promotion should be granted to the service member. This field is available only when the action is *Promotion.* This field is an optional.
Apply to Job	Indicates whether or not the rank change has been inserted into the Job Data record.

Authorizing Organization

Field or Control	*Description*
Business Unit	Enter the business unit that is authorizing this rank change. This is required in order to enter an authorizing department.
Department	Enter the department that is authorizing this rank change. An authorizing business unit must be entered first in order to enter a department.

Responsible Career Manager

Every service member has a career manager working for their career interests. Due to the fluid nature of the military, the Career Manager is determined by either a position or a role as determined by your organization. Use this section to determine whether the Career Manager should be identified by a position or role.

Field or Control	*Description*
Position Number	Select this option if the career manager responsible for this service member's rank change is associated with a designated position. When you select this option, the **Position Number** field becomes available to enter the career manager's position number.
Role and**Role Name**	Select this option if the career manager responsible for this service member's rank change is associated with a PeopleSoft role. When you select this option, the **Role Name** field becomes available to enter the career manager's role.

For more information on setting up roles, see the product documentation for *PeopleTools: Security Administration*.

Related Links

Setting Up Military Rank Change Notification and Documentation

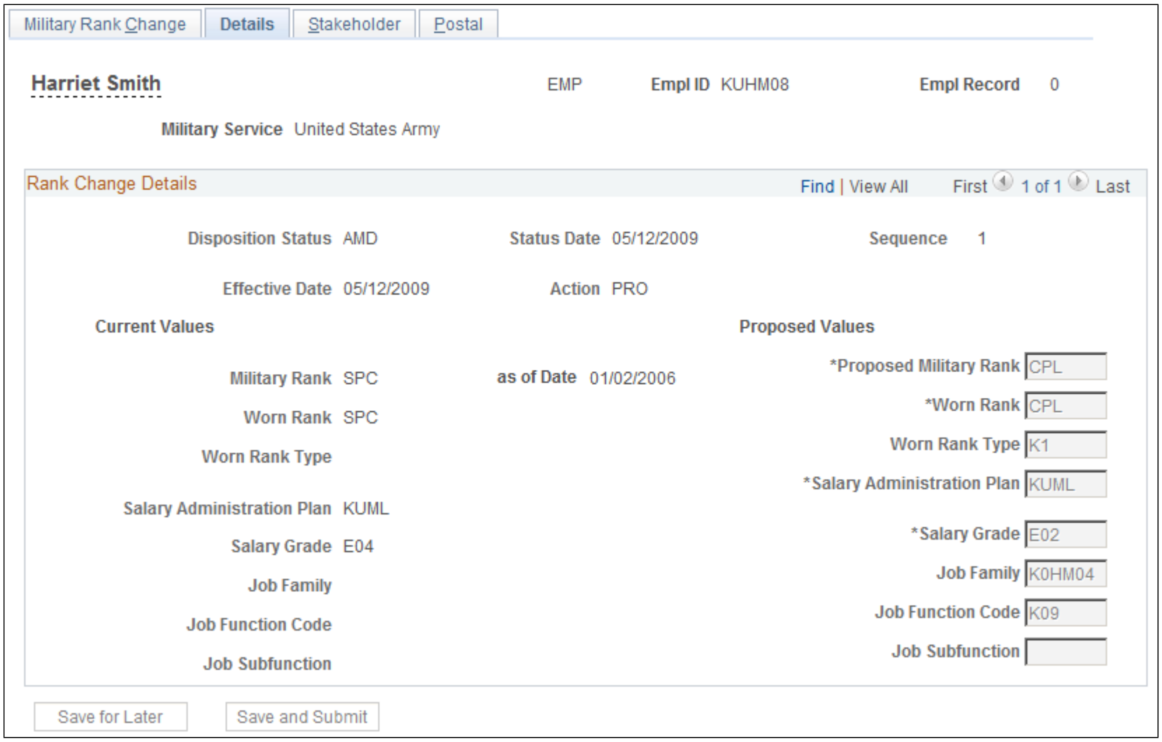
Military Rank Change - Details Page

Use the Military Rank Change - Details page (MIL_RANK_CHNG_DTLS) to enter the proposed military rank change details.

Navigation:

Workforce Administration > **Job Information** > **Military Rank Change** > **Details**

This example illustrates the fields and controls on the Military Rank Change - Details page. You can find definitions for the fields and controls later on this page.



Use this page to view the service member's current military rank information (the left side of the page) and enter the proposed rank changes (the right side of the page).

The **Current Values** fields display the military services member's information from Job Data as of the effective date of this rank change. The values for the current rank and salary information come from the Salary Plan page, the job fields come from the Job Information page.

The **Proposed Values** fields will be written to the military service member's Job Data pages upon meeting approval requirements, if applicable, and reaching the **Application Date** you entered on the Military Rank Change page. These field are unavailable when you enter a cancellation.

Field or Control	***Description***
Proposed Military Rank	Enter the new rank that was proposed for the service member.
Worn Rank	Enter the new worn rank that is proposed for the service member.
Worn Rank Type	Enter the new worn rank type, such as temporary, substantive, or acting, that is proposed for the service member.
Salary Administration Plan and **Salary Grade**	Enter the new salary administration plan and grade proposed for the service member. Valid salary plans and grades for military ranks are defined in the Military Service component. See Military Service - Service Ranks Page.

Field or Control	***Description***
Job Family	Enter the new job family that is proposed for the service member, if applicable.
Job Function Code and **Job Subfunction**	Enter a new job function and a subfunction that is proposed for the service member, if applicable. A job subfunction is a subset of a job function, such as benefits or payroll might be subset of HR. A subfunction can only be selected if you have entered a job function first.

Military Rank Change - Stakeholder Page

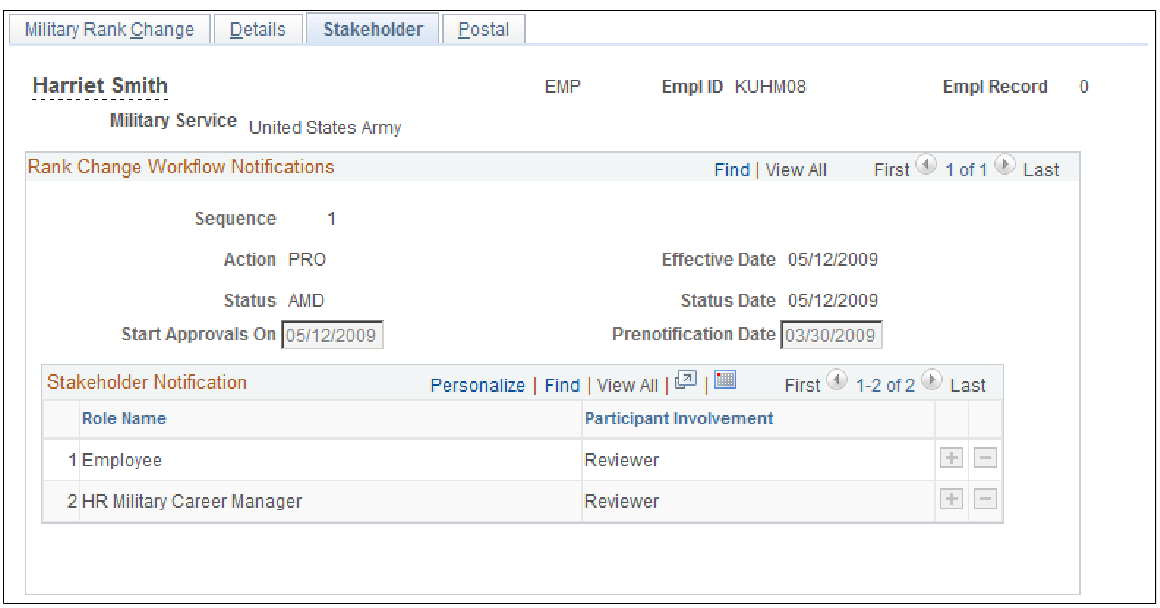
Use the Military Rank Change - Stakeholder page (MIL_STKHLDR_NOTIF) to enter military rank change notification information.

This page is specifically designed to capture when the approval process will begin and who will be involved. List reviewers and approvers for this rank change that will receive an electronic notification and when the system should trigger approval workflow. If prenotification has been enabled, enter a prenotification date on which these stakeholders should be notified of the rank change.

Navigation:

Workforce Administration > **Job Information** > **Military Rank Change** > **Stakeholder**

This example illustrates the fields and controls on the Military Rank Change - Stakeholder page. You can find definitions for the fields and controls later on this page.



Use this page to identify stakeholders that will be notified electronically and set the date on which the system will send out the approval workflow through Approval Framework. The employee's unit commander will always be notified via workflow. As delivered, unit commander has the final approval for their service members.

Note: The unit commander is determined by the **Access Type** selected on the Military Processing Definition page.

Field or Control	*Description*
Start Approvals On	Enter the date that the electronic notifications will be sent out to the stakeholders in notification list for their approval or review. This date should be the current date or a future date. If an earlier date is provided, the approvals will start immediately upon save, just like the current date. After notifications have been sent out to the stakeholders, changes to a rank change request would have to be made by adding an amendment row.
Prenotification Date	Enter the date that the online stakeholder should receive a prenotification message of the service member's rank change that will be made in the system. This date is typically set in conjunction with the **Application Date** field on the Military Rank Change page, notifying stakeholders for a final time that the rank change is going to occur. This provides a final opportunity to stop or modify the rank change one last time. If you are using a template for this rank change, you can have the system automatically enter a **Prenotification Date** value based on the **Application Date** value you have entered on the Military Rank Change page. For example, you have a template that has the **Prenotification Date = Effective Date - Days** field is set to *3* in the Military Rank Change Template component. You then create a rank change request using this template. You enter an **Application Date** value of *June 20,* and the system automatically populates the **Prenotification Date** field with *June 17,* three days before the rank change is applied to the service member's Job Data. **Note:** The **Allow Prenotification** check box must be selected on the Military Processing Definition page and the **Include in Prenotification** check box should be selected for the action specified on the Rank Change Status MIL page for prenotification to take place. See Military Processing Definition Page. See Rank Change Status MIL Page. See Understanding Military Rank Change Processing.
Role Name	Select any additional roles, other than the unit commander, that should be included in the notification process. Roles are created in the PeopleTools Roles table. The unit commander will automatically be notified and does not need to be entered in this Stakeholders Notification group box.
Participant Involvement	Identify the level of involvement of the stakeholder. Values are *Approver* or *Reviewer.*

Military Rank Change - Postal Page

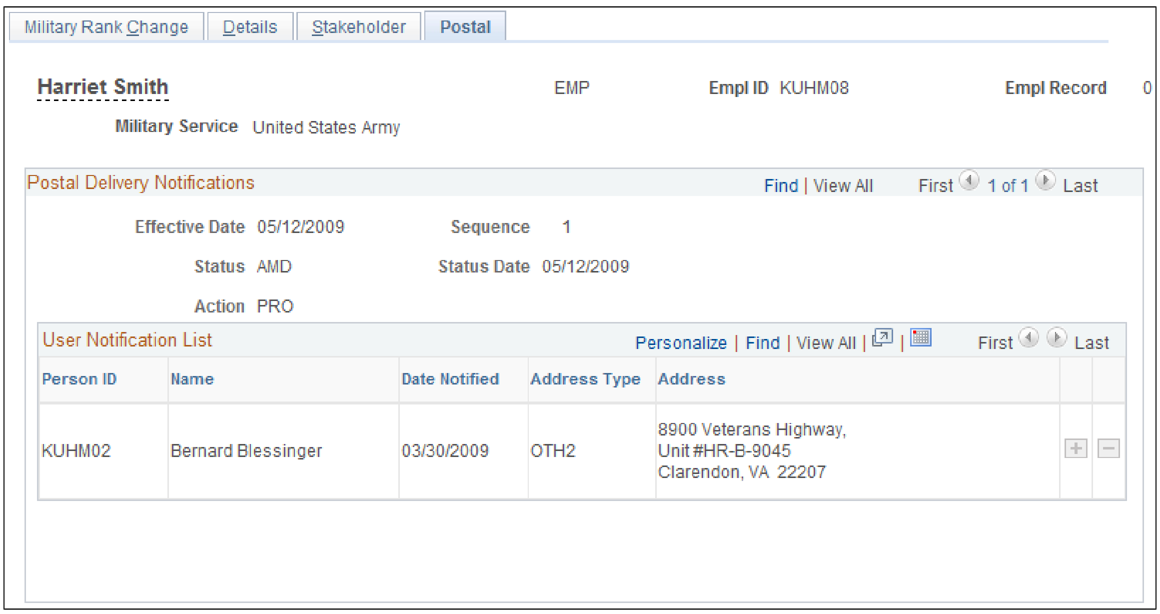
Use the Military Rank Change - Postal page (MIL_RANK_POSTAL) to record postal information for stakeholders that you have notified manually.

Enter stakeholders that you are not notifying electronically and the date and address of where you mailed the notification.

Navigation:

Workforce Administration > **Job Information** > **Military Rank Change** > **Postal**

This example illustrates the fields and controls on the Military Rank Change - Postal page. You can find definitions for the fields and controls later on this page.



Use this page to record those stakeholders that you are notifying of the rank change outside of the AWE process, as specified on the Stakeholder page.

Note: The system does not generate any automatic notifications or letters based on information entered on this page. This page is informational only and should be used to record those notifications you performed yourself.

Field or Control	***Description***
Person ID and **Name**	Enter the PeopleSoft employee ID and the system displays the name of the individual to be notified of this service member's rank change via postal delivery.
Date Notified	Enter the date that you notify the person about the military rank change outside of the automatic electronic notification.

Field or Control	*Description*
Address Type and**Address**	Select an address type such as *Home, Mailing,* or *Business.* If an address is associated with this address type, the system will populate the **Address** field. If there is no address provided from the system, you can manually enter the address.

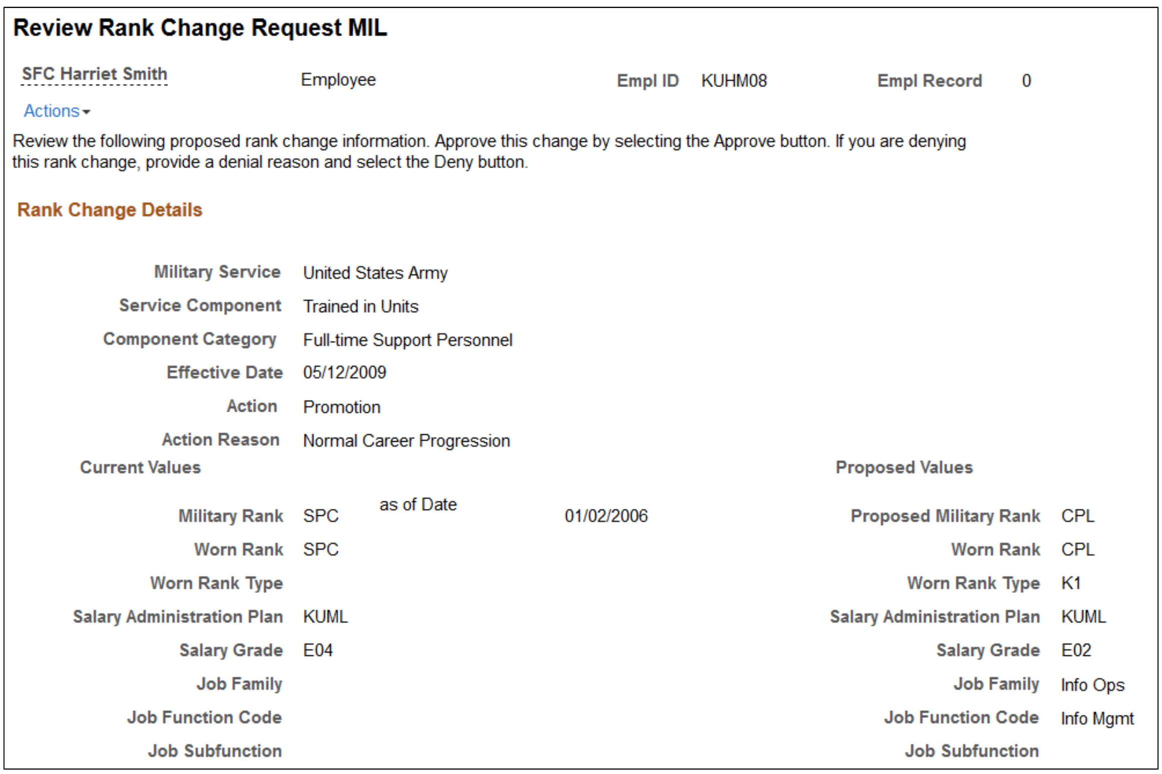
Review Military Rank Change Page

Use the Review Military Rank Change page (MIL_RANK_CHNG_APPR) to approve or deny rank change requests.

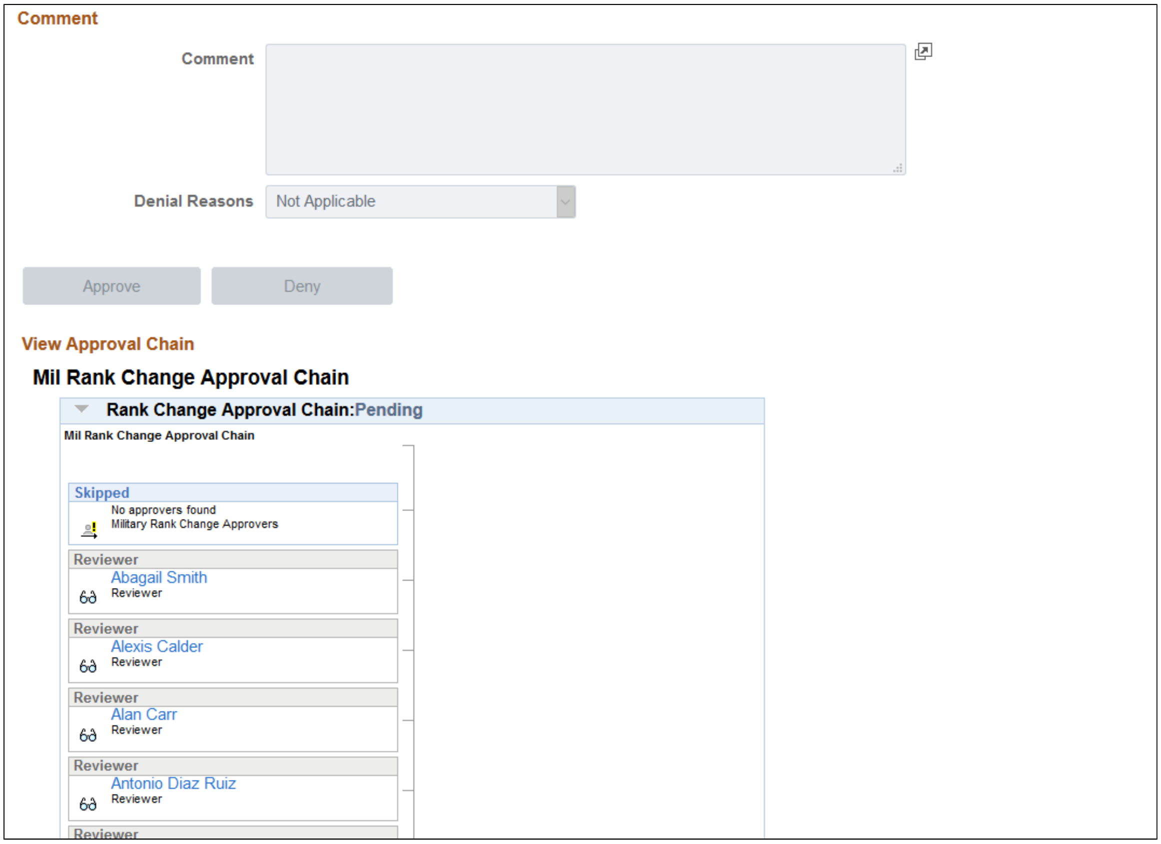
Navigation:

Manager Self Service > **Job and Personal Information** > **Review Military Rank Change** > **Review Military Rank Change**

This example illustrates the fields and controls on the Review Military Rank Change page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Review Military Rank Change page (2 of 2). You can find definitions for the fields and controls later on this page.



This page is available to approvers who have not yet approved the transaction as well as reviewers. Approval notifications are sent out via the Launch AWE for Mil Rank Change (MIL_AWE_AE) Application Engine process, which you can schedule to run daily or on an as needed basis.

See Understanding Military Rank Change Processing.

Rank Change Details

This page displays the current and proposed rank change values. Approve or deny the rank change request by selecting the appropriate button. If you are denying the request, select a reason from the **Denial Reasons** drop down box.

The effect date comes from the **Effective Date** field in the Military Rank Change component.

Note: When a rank change is denied, the Career Manager should insert a cancellation row in the Military Rank Change component for this person to record the change of disposition. The system will also send out an updated notification and will not insert the rank change into Job Data.

View Approval Chain

You can also view the status of the rank change approval chain in the **View Approval Chain** section of the page. This approval process is a two step process: first the system sends out notifications to the approvers specified on the Military Rank Change - Stakeholder page, then, if approved, the system forwards the notification to the unit commander for approval. When there is no approver for the first step of the process, then the transaction is immediately routed to the unit commander.

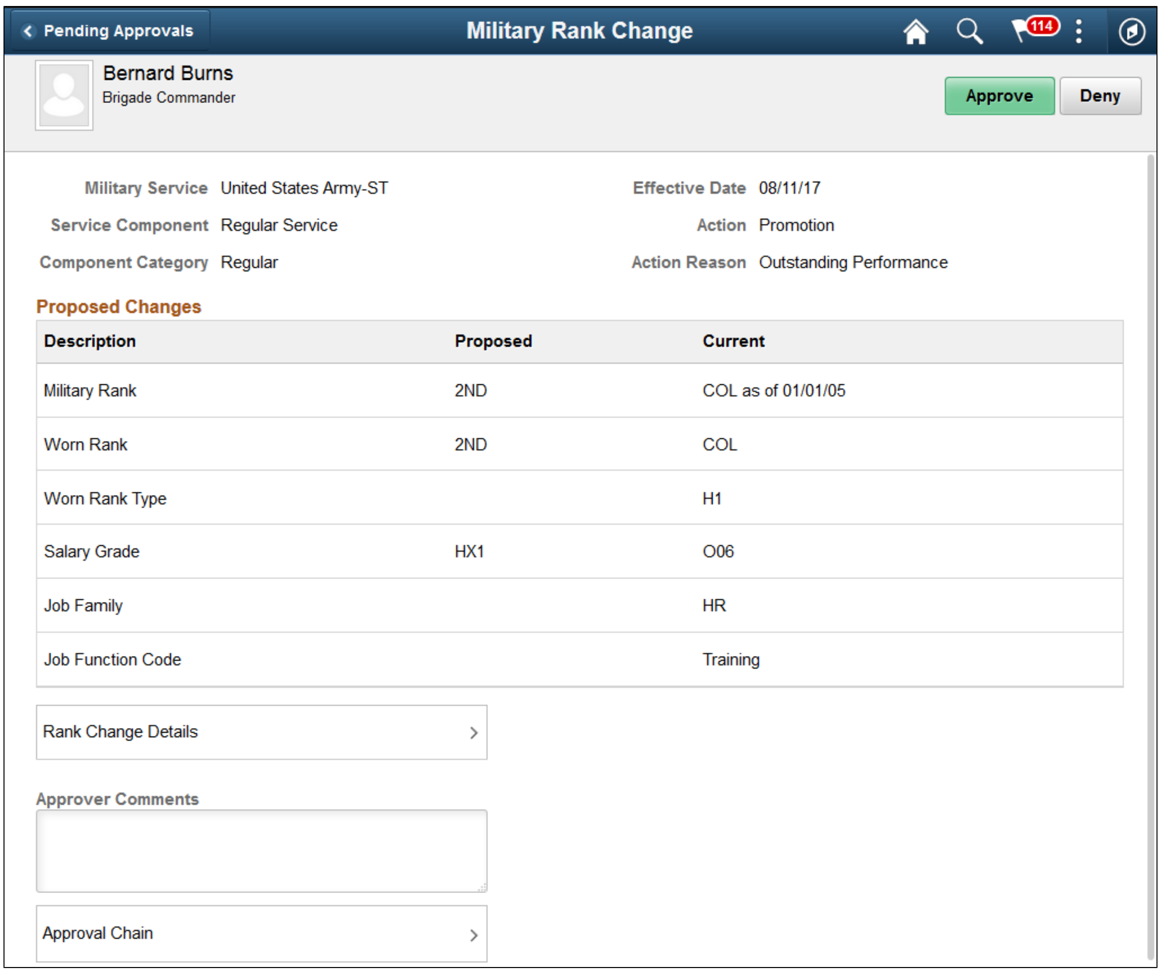
Pending Approvals - Military Rank Change Page

Use the Pending Approvals - Military Rank Change page (EOAWMA_TXNHDTL_FL) to take review and take action on a military rank change approval request using the fluid approvals.

Navigation:

On the Manager Self Service home page, click the Approvals tile to access the Pending Approvals page. Then click a *Military Rank Change* transaction row on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Military Rank Change page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

Field or Control	***Description***
Approve and **Deny**	Use these buttons to take action on the requested approval.

Proposed Changes

The proposed changes fields on this page show those changes that are being proposed for this transaction you are being asked to approve. These fields correspond to the same fields that were changed on the Military Rank Change - Details Page.

Additional Information

Field or Control	***Description***
Rank Change Details	Click this link to access the Rank Change Details MIL Page, where you can review rank change specifications, such as the proposed and current military rank, worn rank, salary and job information.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

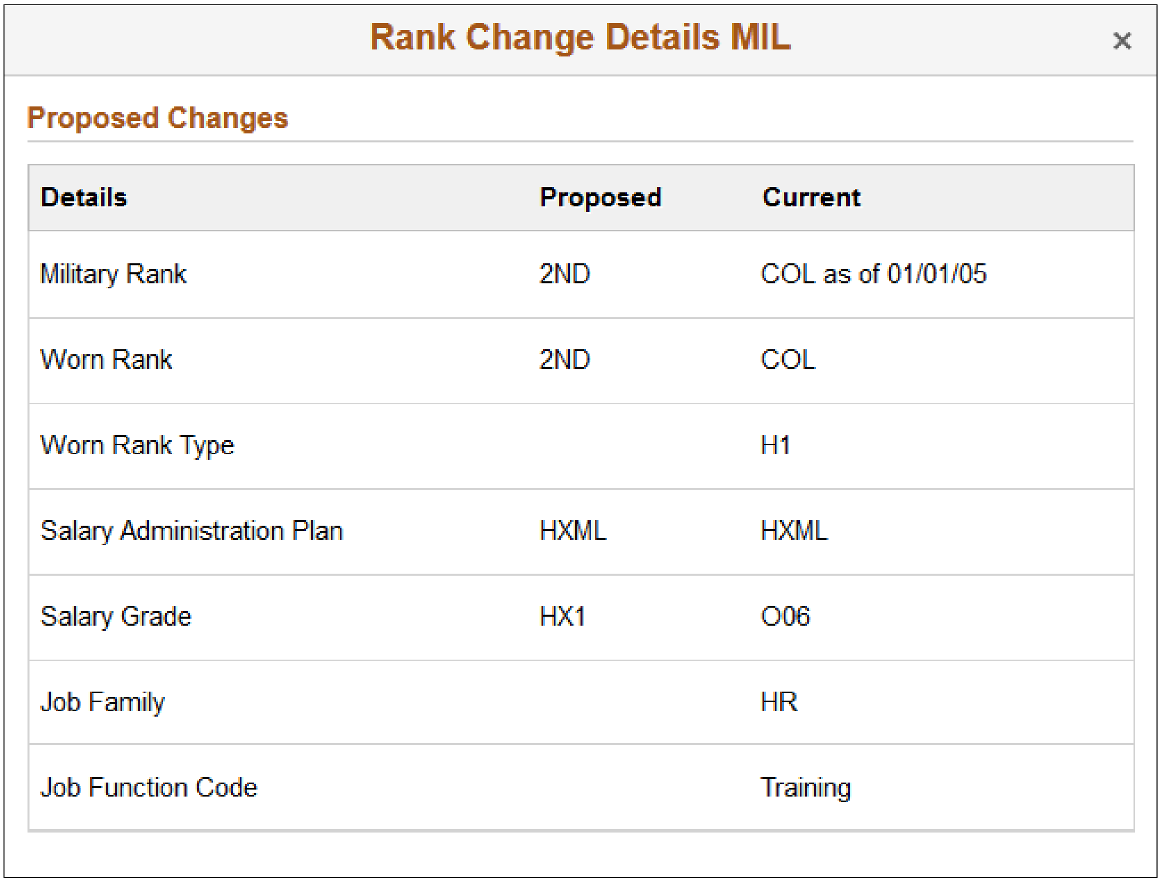
Rank Change Details MIL Page

Use the Rank Change Details MIL page (HRMIL_RANKDTL_SCF) to review the details of a military rank change request.

Navigation:

Click the **Rank Change Details** item row on the Pending Approvals - Military Rank Change Page.

This example illustrates the fields and controls on the Rank Change Details MIL page.


Rank Change Details MIL

Proposed Changes

Details	Proposed	Current
Military Rank	2ND	COL as of 01/01/05
Worn Rank	2ND	COL
Worn Rank Type		H1
Salary Administration Plan	HXML	HXML
Salary Grade	HX1	O06
Job Family		HR
Job Function Code		Training

The fields on this page correspond to the same-named fields on the Military Rank Change - Details Page and shows all the fields, regardless if they have been changed or not.

Generate Rank Change Notices Page

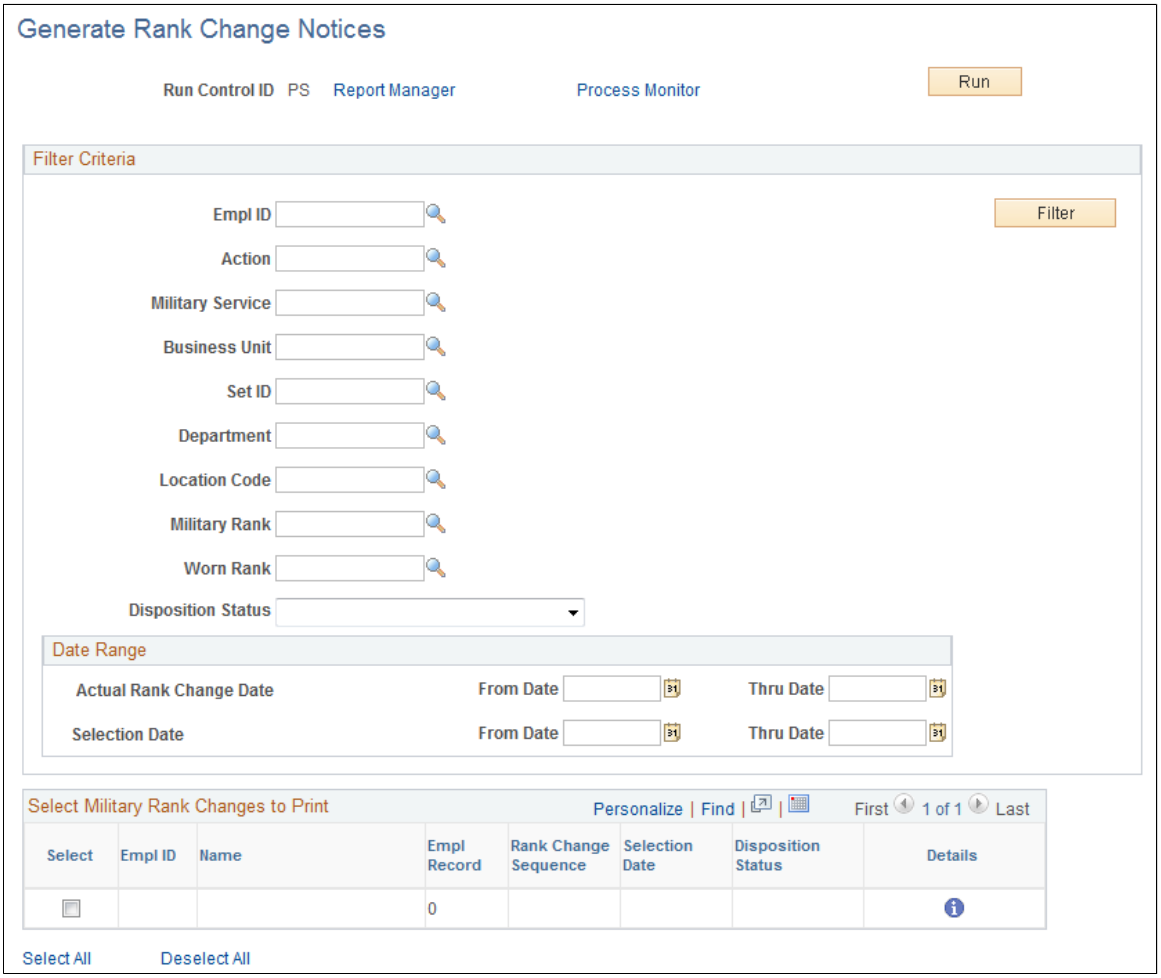
Use the Generate Rank Change Notices page (MIL_NOTICE_RUN_CTL) to generate service member rank change notices using XML Publisher.

A report can be generated in any status, at any point in time.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Generate Rank Change Notices** > **Generate Rank Change Notices**

This example illustrates the fields and controls on the Generate Rank Change Notices page. You can find definitions for the fields and controls later on this page.



Generate this report for a single individual or for several people for which you have entered a military rank change. Enter search criteria such as an employee ID, department or location information, rank details, a rank change date range, or any combination of these items. The **Actual Rank Change Date** fields use the Application Date from the rank change request, and the **Selection Date** field uses the effective date that the person was selected for the rank change.

Click **Filter** to initiate the search. The system will display those who meet this criteria in the **Select Military Rank Changes to Print** grid. Select those for whom you wish to print the report and run the process This process initiates the Military Rank Change Notices (MILRNKNOT XML Publisher) process, which calls the MILRNKNOT Application Engine process.

Important! Separate files are generated for each employee and the files are stored in the report folders of the respective server.

See Understanding Military Rank Change Processing.

Setting Up and Tracking Military Service Availability

To set up military service availability tracking, use the Military Deployment Reasons (MIL_DEPL_REASON) and Military Reassignment Reasons (MIL_REASSGN_RSN) components.

These topics discuss how to track military service availability.

Pages Used to Enter and Track Military Service Availability

Page Name	***Definition Name***	***Usage***
Deployment Reasons Page	MIL_DEPL_REASON	Enter reasons military members are either unavailable for deployment or are available in a limited capacity.
Reassignment Reasons Page	MIL_REASSGN_RSN	Enter reasons military members are either unavailable for reassignment or are available in a limited capacity.
General Availability MIL Page	MIL_AVAIL_DEFN	Track military service availability for deployment and retirement. Use this page to also enter a compulsory retirement date, if applicable.

General Availability MIL Page

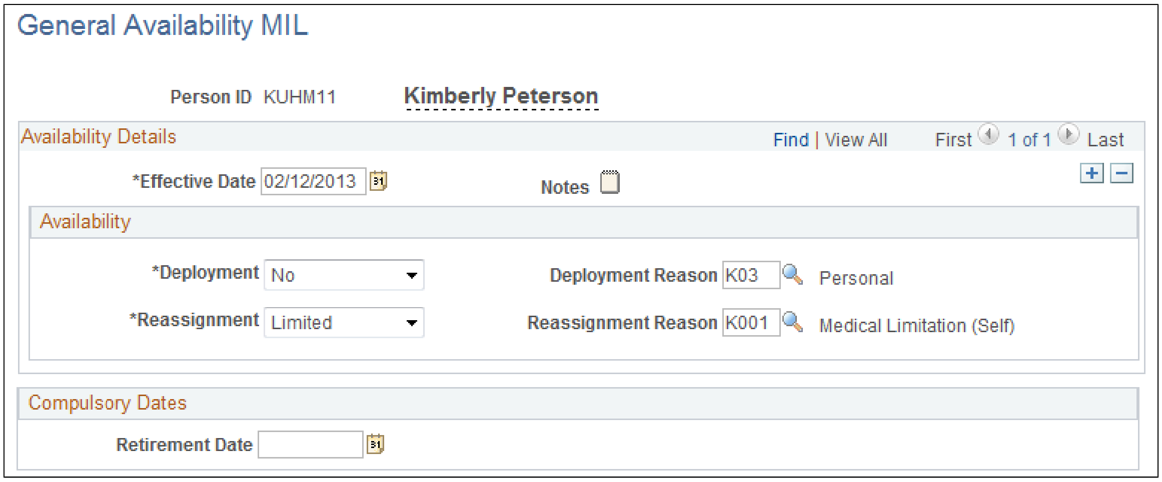
Use the General Availability MIL page (MIL_AVAIL_DEFN) to track military service availability for deployment and retirement.

Use this page to also enter a compulsory retirement date, if applicable.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Military General Availability** > **General Availability MIL**

This example illustrates the fields and controls on the General Availability MIL page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Effective Date	Enter the effective date of a member's deployment and reassignment availability to keep historical track of when the member's availability changes.
Notes	Click the **Maintain/View Notes** icon to enter additional notes about the person's availability. The system tracks the date you enter a comment. You can also search for comments by entering a date range and selecting them for review, deletion, or transferring the comment to another person.
Deployment	Identify whether this service member is ready for deployment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for deployment, the **Deployment Reason** field displays.
Deployment Reason	Provide the reason the service member is not deployable. This field is available when you select *No* or *Limited* in the **Deployment** field. Valid values are defined in the Deployment Reasons table.
Reassignment	Identify whether this service member is available for reassignment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for reassignment, the **Reassignment Reason** field displays.
Reassignment Reason	Select a reassignment reason to track military members who are either unavailable for reassignment or are available only in a limited capacity. This field is available when you select *No* or *Limited* in the **Reassignment** field. Valid values are defined in the Military Reassignment Reasons table.

Field or Control	***Description***
Retirement Date	Enter the compulsory retirement date, or absolute date, the member must retire from the military.

Tracking Military Discharge Dates

This topic discusses how to track military discharge dates.

Page Used to Track Military Discharge Dates

Page Name	***Definition Name***	***Usage***
Military Discharge Date Page	PERS_MILIT_USA	Enter an employee's military discharge date.

Military Discharge Date Page

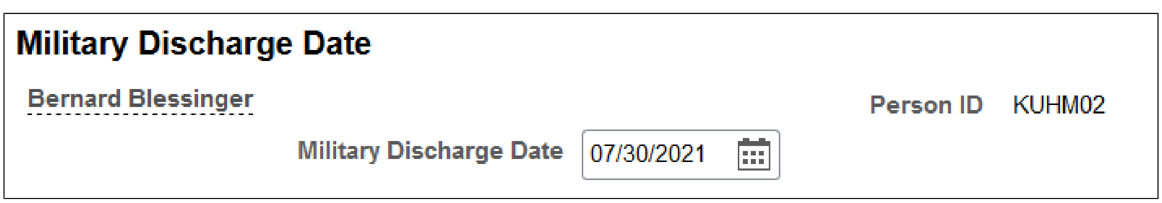
Use the Military Discharge Date page (PERS_MILIT_USA) to enter an employee's military discharge date.

Navigation:

- **Workforce Monitoring** > **Meet Regulatory Rqmts** > **Military Discharge Date** > **Military Discharge Date**
- **Workforce Administration** > **Personal Information** > **Biographical** > **Add a Person** > **Regional**

  Click the **Edit Discharge Date** link on the Regional page.

This example illustrates the fields and controls on the Military Discharge Date page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Military Discharge Date	Enter the employee's military discharge date. This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.

Chapter 16

Entering Additional Data in Human Resources Records

Understanding Additional Worker Data

After you've entered a worker's basic personal information and created one or more organizational instances for them, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person.

While many of the pages covered in these topics are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Locating Personnel Records

When you open an additional information page, the system displays the dialog box for you to select the person. If you don't know the person's employee ID, there are alternate ways to locate the person's record:

- Use the search dialog box to search for the correct record by name or partial last name or middle name.

  Advanced search options may also be available.
- Use the Search Criteria page to search for a person ID by name, address, city, date of birth, gender, or national ID.
- Use the Search Person by National ID page to find a person's person ID by using a national ID.

  After you have the person's employee ID, enter it in the dialog box for the page you are accessing.

These topics discuss locating personnel records.

Pages Used to Locate Personnel Records

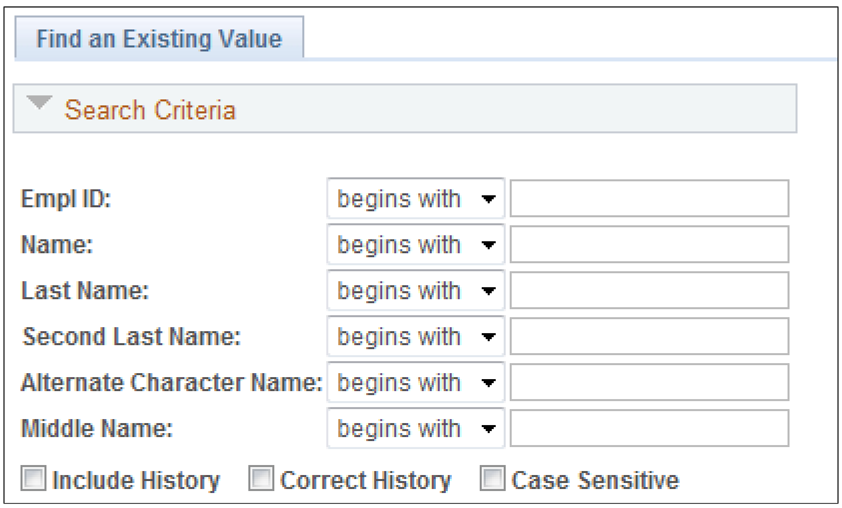
Page Name	***Definition Name***	***Usage***
"Search Criteria Page" (Application Fundamentals)	HCR_SM_SEARCH	Enter criteria to search for duplicate or multiple records

Page Name	***Definition Name***	***Usage***
Search Person by National ID page	NID_LOOKUP	Locate a person's employee ID by using the national ID. When you find the person's employee ID, use it when you move to other search pages.

Searching with the Search Dialogue

Use the following search dialog box to find a person's information. You encounter this sort of dialog box when you enter most pages in the Workforce Administration menu. You can also enhance the component's underlying search record to expose other fields as alternate search criteria or as list box items. These fields may include relevant additional fields such as: middle name, alternate character name, department, setID, organizational relationship, POI type, military rank, and so on.

This example illustrates the fields and controls on the Search dialogue. You can find definitions for the fields and controls later on this page.



You must have already created job records in PeopleSoft Human Resources for the person for whom you are searching. In other words, you must have already added the person to the system and created an organizational instance for the person.

Term	***Definition***
Empl Record	If the person has more than one organization instance or job record, enter the record that you want to access. If you do not know which record you want to access, do not enter a value in this field. The system lists all the job records in the search results, enabling you to select the appropriate one.

Term	***Definition***
Name, Last Name, and **Middle Name**	If you're not sure of the entire employee ID or name, make a partial entry in one of these fields and click **Search** to search for the correct name and ID. You cannot use this field to search for last names using special characters, such as double-byte Japanese characters.
Alternate Character Name	If you selected the **Alternate Character** option for your user ID on the Primary Permission List Preferences table, you can also search for employee names by using the Alternate Character search feature in PeopleSoft Human Resources.
Organizational Relationship	Select the organizational relationship to narrow your search to *Employees, Contingent Workers,* or *Person of Interest.*
Military Service, Rank, and **Worn Rank**	Enter the military information to search for people associated with a military service or rank. The military fields must be activated after installation or upgrade if you choose to have these fields appear as an alternate search key or list box attribute.

Related Links

“Understanding PeopleSoft HCM System Data Regulation” (Application Fundamentals)
“Working with Alternate Character Sets” (Application Fundamentals)

Search Person by National ID page

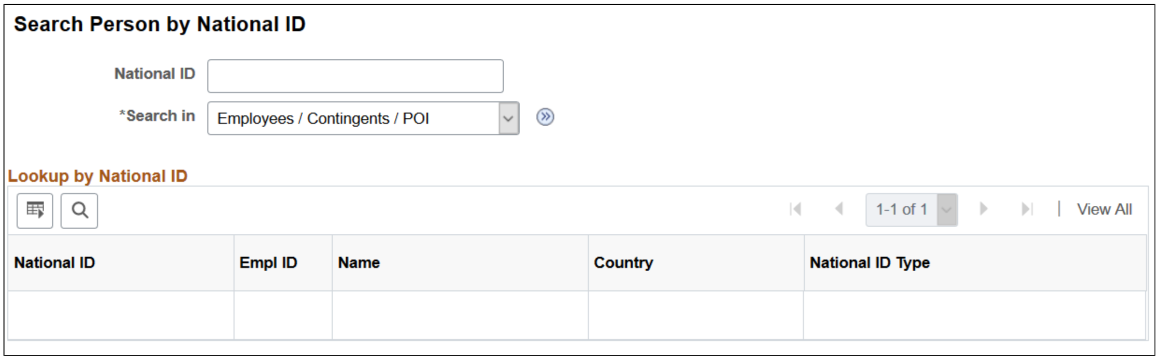
Use the Search Person by National ID page (NID_LOOKUP) to locate a person's employee ID by using the national ID.

When you find the person's employee ID, use it when you move to other search pages.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Search Person by National ID**

This example illustrates the fields and controls on the Search Person by National ID page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
National ID	Enter the national ID of the person whose records you want to view.
Search In	Select *Employees / Contingents / POI* or *Dependents and Beneficiaries* to narrow your search. **Note:** *Employees / Contingents / POI* includes all people who were added to the system on the Personal Information component, including contingent workers and people of interest.
Search	Click to have the system display a list of the records that match the ID that you entered.

Tracking Workforce Contracts

These topics discuss tracking workforce contracts.

Note: Contracts are driven by regulatory region (and that region's setID) on the job data record associated with the contract. On the Update Contracts component, you must select the regulatory region that is on the person's job data record and the system only makes available contract clauses and types that share the setID of this regulatory region.

Pages Used to Track Workforce Contracts

Page Name	***Definition Name***	***Usage***
Contract Status/Content Page	CONTRACT1	Add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content. You must have previously set up contract template IDs on the Define Contract Templates page.
Contract Type/Clauses Page	CONTRACT2	Add or update any special contract clause information to the standard contract language for this worker.
Original Contract Data Page	CONTRACT_BEL_SEC	(BEL) Enter information about the original contract that the new contract is replacing.
Contract Data - Task Order Information Page	CONTRACT4	Track contractor work to a more detailed line item, rather than at the contract level. This may enable more accountability and tracking of contractors. This page is optional.
Contract Data - Signature Date/Probation Info Page	CONTRACT3	Add or update the signature date, responsible party, and probation information. View basic job data.
Contract Information Report Page	RUNCTL_CNT001	Generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period.

Related Links

"Understanding Contract Pay Processing" (PeopleSoft Payroll for North America)
"Understanding Contract Earnings" (PeopleSoft Payroll for North America)
Setting Up Workforce Contracts

Contract Status/Content Page

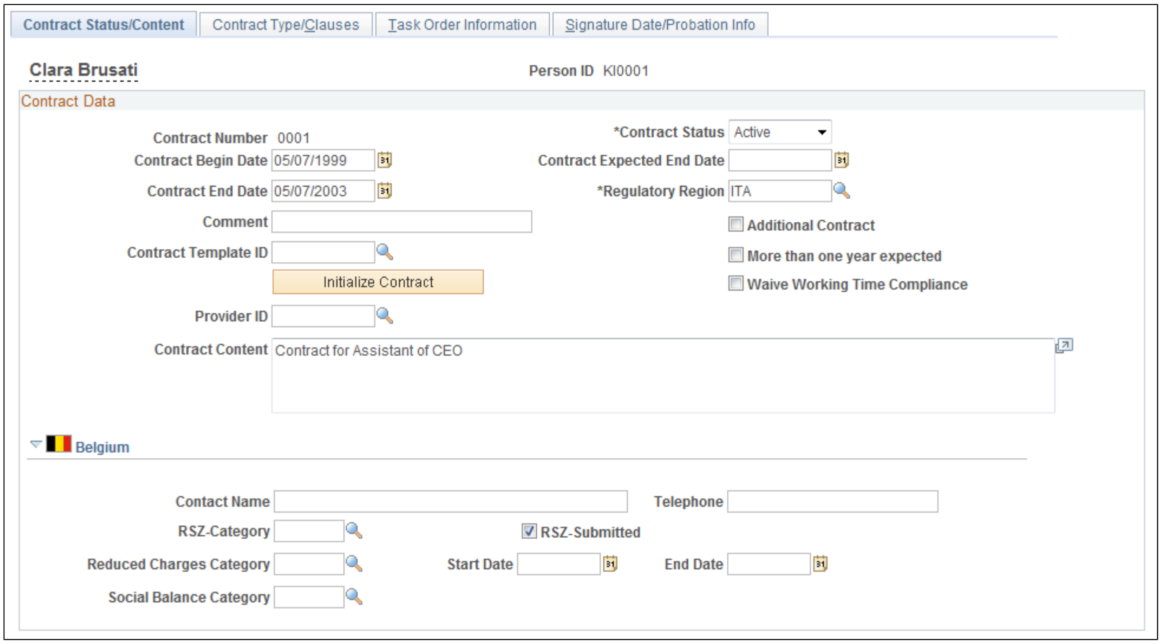
Use the Contract Status/Content page (CONTRACT1) to add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content.

You must have previously set up contract template IDs on the Define Contract Templates page.

Navigation:

Workforce Administration > Job Information > Contract Administration > Update Contracts > Contract Status/Content

This example illustrates the fields and controls on the Contract Status/Content page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Contract Status	Indicate whether the contract is *Active* or *Inactive.*
Contract Begin Date	Enter the date when the contract begins. The current date is the default.
Contract Expected End Date	Enter the date when you expect the contract will end.
Contract End Date	Enter the date when the contract actually ended. This date may differ from the date that you expect the contract to end.
Regulatory Region	Enter a regulatory region. The regulatory region must share the setID of the contract type and be the regulatory region on the person's job data record for this contract.
Comment	Enter a comment for this contract.
Additional Contract	Select if the worker already has at least one contract. Leave this field blank if this is the worker's only contract.

Field or Control	*Description*
More than one year expected	Select if you expect that this contract will result in more than one year of employment for this worker. **Note:** This field is required for contracts with Japanese workers.
Waive Working Time Compliance	Select if the contract allows working time compliance to be waived by the worker.
Contract Template ID and **Initialize Contract**	If you have defined a template for the contract, select an ID from the list of valid templates stored on the Define Contract Templates page, and click **Initialize Contract.** The system displays a description of the contract and its default contents. **Note:** If there are any task orders associated to the contract template, only those task orders with an effective date on or after the individual's Contract Begin Date will default to the individual contract level.
Provider ID	If this contract is with a contingent worker, specify the person's provider, agency, or employer.
Contract Content	If you entered a contract template code and clicked the **Initialize Contract** button, the system automatically completes this field with the content that was entered on the Define Contract Templates page. Otherwise, enter the contract language.

(BEL) Belgium

Field or Control	*Description*
RSZ-Category	If you're entering a contract and you selected *Employment* as the contract type on the Contract Type / Clauses page, choose an RSZ category from the valid RSZ category codes stored on the RSZ Categories page (CNT_RSZ_TBL_BEL).
RSZ-Submitted	Select to indicate that social insurance premiums need to be paid by the worker to the Belgian RSZ governing body for this job contract.

Field or Control	*Description*
Reduced Charges Category	Select from among the categories, if appropriate. Employers can lower their RSZ premium contributions if they are offering a job for one of the two reduced charges categories. Companies that employ workers who qualify for the reduced charges category enjoy lower employee costs.
Social Balance Category	Select the appropriate social balance category. This information is included on the BEL Social report.

Related Links

(ESP) Setting Up Spanish Workforce Tables

Social Security Scheme Table - Scheme Page

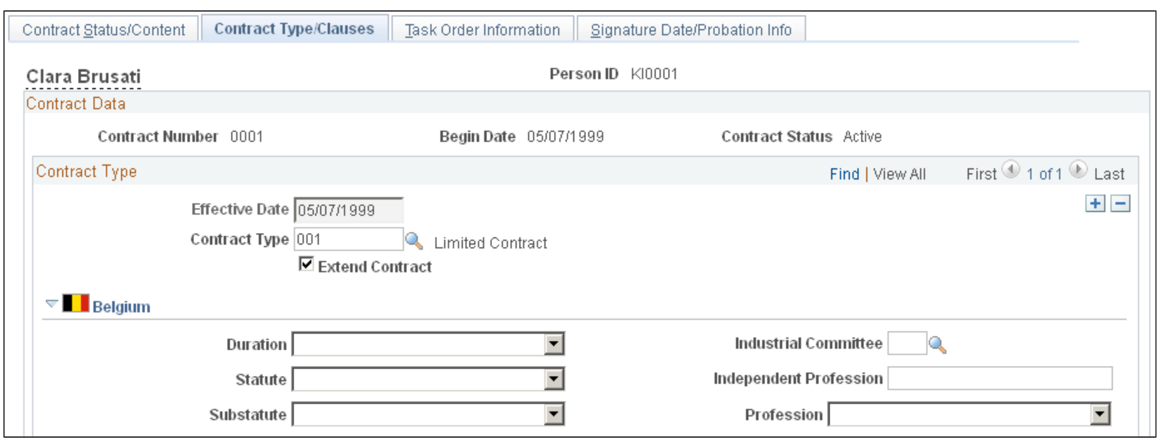
Contract Type/Clauses Page

Use the Contract Type/Clauses page (CONTRACT2) to add or update any special contract clause information to the standard contract language for this worker.

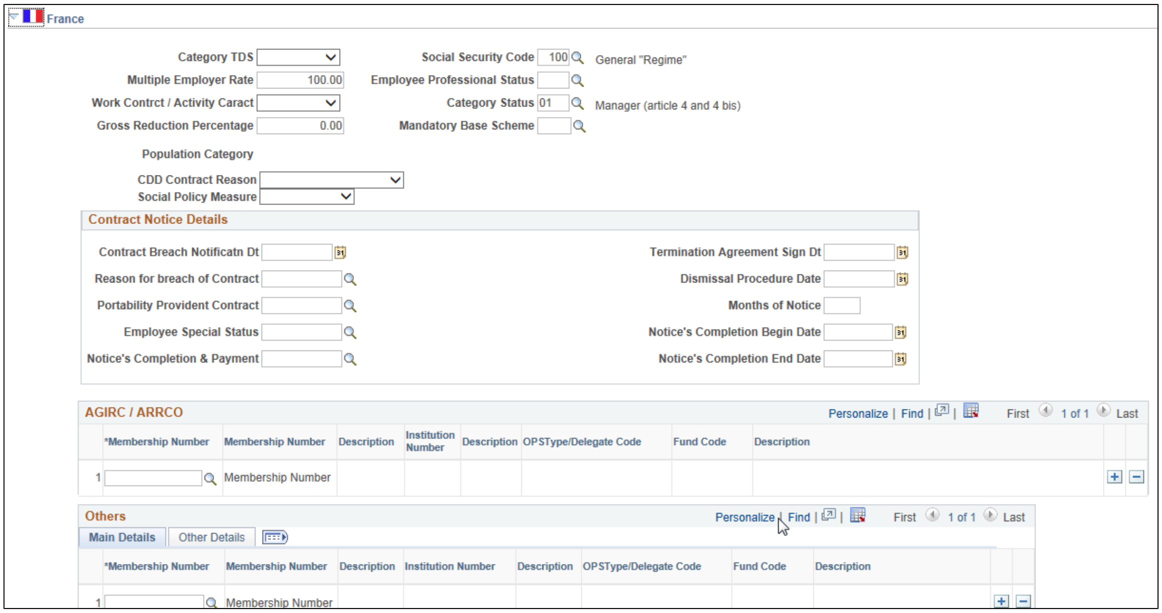
Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts** > **Contract Type/Clauses**

This example illustrates the fields and controls on the Contract Type/Clauses page (1 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Contract Type/Clauses page (2 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Contract Type/Clauses page (3 of 3). You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Contract Type	Select the contract type.
Extend Contract	Indicate if the individual's original contract has been extended beyond it's original date or purpose.

Contract Clauses

Field or Control	***Description***
Seq Nbr (sequence number)	When you add a clause to the contract, the system assigns a sequence number automatically.
Clause	Select a clause.
Clause Status	The status that is associated with the clause that you selected appears by default.

(BEL) Belgium

Field or Control	***Description***
Duration	Select a duration period for the workforce contract.
Original Contract	If *Replacement* defines the duration period, the **Original Contract** link appears. Click to access the Replace Contract BEL page to enter the employee ID and original contract number.
Statute	Select a contract statute, or employment category, for this worker.
Independent Profession	If you selected *Self employed* as the contract type, provide the worker's independent profession here.
Substatute	Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code that you selected.
Profession	If you selected *Member of the Professions* as the contract type, indicate additional profession information here.

(FRA) France

Field or Control	***Description***
Category TDS	Select a worker category: *Apprentice, Executive,* and *Manager.* This field is used to prepare the DADS TDS report.

Field or Control	***Description***
Social Security Code	Select a social security code. The social security code is the contribution class, or régime, of the worker. Any worker who is eligible for a contribution must be associated with a social security code.
Multiple Employer Rate	The earnings ceiling is reduced if an employee has multiple contracts active at the same time. The reduction appears here as a percentage. If a worker has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a worker has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the **Multiple Employer Rate** field, employer A enters *40* and employer B enters *60.*
Employee Professional Status	Select the profession that is designated for this worker.
Work Contrct/Activity Caract	Used to prepare the DADS TDS report. Values are *Full Time, Home, Intermitt., Part Time, Seasonal W, Temporary,* and *Wo Ctc Cpl.*
Category Status	Select the category status. The category status affects the type of pension/contingency fund to which the employee contributes.
Gross Reduction Percentage	The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These workers do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced by the percentage indicated here. For example, suppose that a worker is entitled to a 30 percent reduction. If he has a salary of 1500 EUR, he contributes for only 1000 EUR. This field has a default value of *0.*
Mandatory Base Scheme	Select the base compensation scheme for this workforce contract.

Field or Control	*Description*
CDD Contract Reason	Select the contract reason code applicable for the CDD contract. **Note:** This field appears only when the contract is of type CDD.
Population Category	Displays the population category that applies to the employee. The system determines the population category from the INSEE code associated with the employee's job code. INSEE codes are linked to population categories on the INSEE Table page.
Social Policy Measure	Select the conventional plan attached to the selected Contract Type. • *21*, *41*, *42*, *50*, *50*: These values can be selected if the contract type is *CDI* or *CDD*. • *61*, *80*: These values can be selected only if the contract type is *CDI*. • *40*, *70*: These values can be selected only if the contract type is *CDD*. • *64*, *65*: These values can be selected only if the contract type is *APP*. **Note:** The above values are applicable as of year 2015 and may change in future.

Field or Control	Description
Contract Notice Details	Use this group box to enter details of Contract Termination. • **Contract Breach Notificatn Dt**: Date on which the contract breach has been notified. It can be the date on the acknowledgement receipt of the letter of dismissal, or date of dispatch or hand delivery of the letter of resignation by the employee, or the date of notification of the end of the probationary period of the employer or employee. • **Termination Agreement Sign Dt**: Date on which the employer and employee sign the termination agreement. • **Reason for breach of Contract**: Reason behind the breach of contract. The possible values are: Dismissal following liquidation or judicial reorganization, dismissal following definitive closure of the establishment, economic redundancies, dismissals for end of construction, and other nature of dismissal as described by the French Government. • **Dismissal Procedure Data**: Date of interview prior to termination, or date of the first meeting of the work committee or staff delegates in case of redundancy of ten or more employees in a period of 30 days. • **Portability Provident Contract**: Whether there is a contract between the parties to settle if a dispute arises or to prevent future litigation. • **Months of Notice**: Number of months of notice served legally and for which compensation was paid. • **Employee Special Status**: Status or position of the employee within a business or association. • **Notice's Completion Begin Date** and **Notice's Completion End Date**: Begin date and end date of the notice. • **Notice's Completion & Payment**: Status of the notice. The possible values are: *Served*, *Not Served*, *Paid*, and *Unpaid*.

Field or Control	Description
AGIRC / ARRCO	Use this group box to assign the employee to an AGIRC or ARRCO pension contract, if you want to override the contracts defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible. Select the AGIRC/ARRCO contract in the **Membership Number** field and the system completes the remaining fields in this group box. Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page. **Note:** Employees should be assigned to only one contract with an institution type of AGIRC or ARRCO on any given date. See (FRA) Setting Up French Workforce Tables. See (FRA) Providing Additional Information for French Workers. See “Define OPS Page” (PeopleSoft Human Resources Meet Regulatory Requirements)

Field or Control	*Description*
Others	Use this group box to assign the employee to a contingency fund contract. Contingency funds defined on this page are in addition to any contingency funds defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible. Select the contingency contract in the **Membership Number** field and the system completes the contract details fields. Click the link in the **Membership Number** column to view the contract details. The system displays the Pension/Contingency Contracts page. Select a value in the **Covered Population** field that indicates who is covered by the contract. Select a value in the **Contract Event** field to indicate whether this is a new contract or the type of change in contract. Contract events are required for DADS reporting. Select a value in the **Population Category** field to indicate the population category that applies. This value is required for DUCS reporting. The default value is the population category for the employee's job code but you can override it. See “Extracting DADS Data” (PeopleSoft Global Payroll for France). See “Understanding DUCS Processing” (PeopleSoft Global Payroll for France).

(ITA) Italy

Field or Control	*Description*
Plan ID	If the worker was assigned a contract type of *Training and Labor,* you must select a plan ID.
Reason	If the worker was assigned a contract type of *001: Limited Contract,* you must enter a reason for the contract.
Empl ID Replaced	If the reason for the determined period contract type is *Maternity* or *Replacement,* select the employee ID of the worker who is being temporarily replaced by this contract worker.

The following fields appear in the **Target Categorization** group box only if the contract type is *Training and Labor*.

Field or Control	***Description***
Labor Agreement	Select the labor agreement for this contract and plan ID.
Category	Select the labor category for this contract.
Subcategory	Select the subcategory for this contract.
Subcategory 2	If the subcategory selected above has further divisions, select the subcategory 2 here.

Related Links

Statutes Page

Contract Data - Task Order Information Page

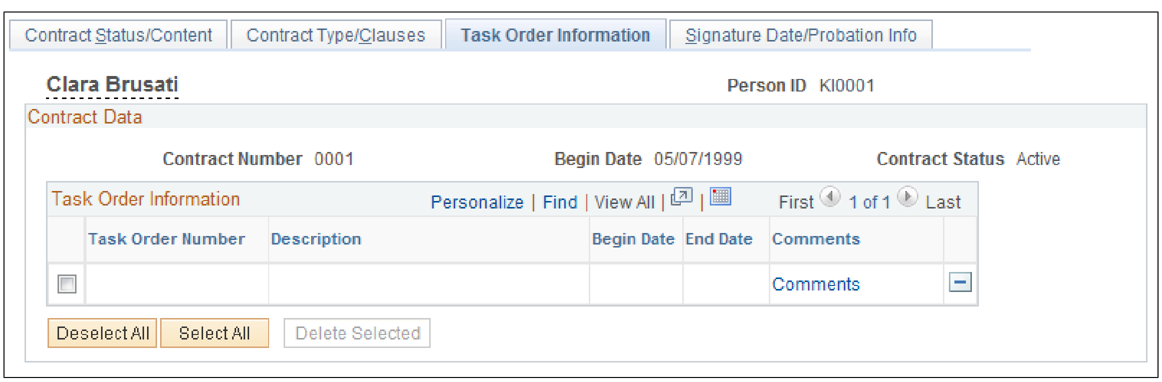
Use the Task Order Information page (CONTRACT4) to track contractor work to a more detailed line item, rather than at the contract level.

This may enable more accountability and tracking of contractors. This page is optional.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts** > **Task Order Information**

This example illustrates the fields and controls on the Contract Data - Task Order Information page. You can find definitions for the fields and controls later on this page.



If you are using Contract Templates, this page enables you to manage the task orders, such as subcontracts, with which an individual is associated with under the primary contract template. Once you enter the contract template ID and initialize the contract, the system will enter any task orders that have a begin date on or after the contract begin date. You can then manage the specific task orders and enter comments associated with this person.

Contract Data - Signature Date/Probation Info Page

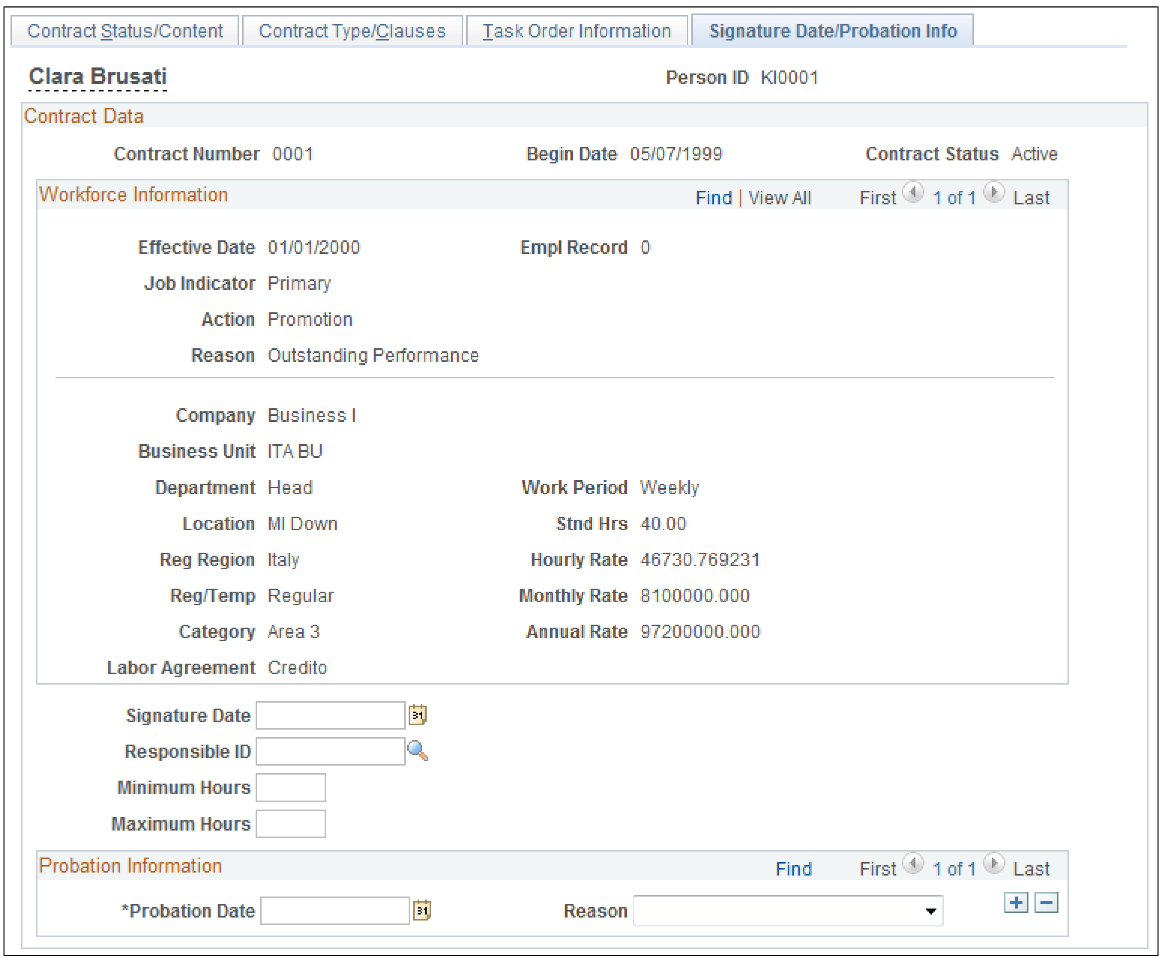
Use the Signature Date/Probation Info page (CONTRACT3) to add or update the signature date, responsible party, and probation information.

View basic job data.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts** > **Signature Date/Probation Info**

This example illustrates the fields and controls on the Contract Data - Signature Date/Probation Info page. You can find definitions for the fields and controls later on this page.



The display-only data at the top of this page is derived from the Job Data component.

Field or Control	***Description***
Signature Date	Enter the contract's signature date. This information is required in some European countries, including Germany.

Field or Control	***Description***
Responsible ID	Enter the company agent who drafted the contract and who is responsible for its language.
Minimum Hours and **Maximum Hours**	The system supplies default values from the Installation table for this contract.
Probation Date	Enter multiple probation dates if they are required for this worker. The probation date that you enter here also appears on the job data record for this worker.
Reason	Indicate a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

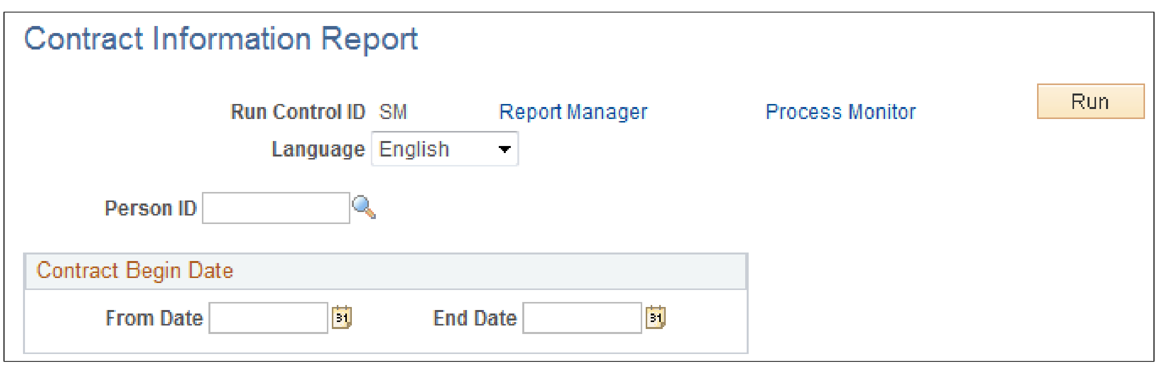
Contract Information Report Page

Use the Contract Information Report page (RUNCTL_CNT001) to generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Contract Information Report**

This example illustrates the fields and controls on the Contract Information Report page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Person ID	Enter the person ID of the worker for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range that you specify) for all workers.

Field or Control	***Description***
From Date and **End Date**	Enter the date range for which you want contract information.

(ESP) Tracking Spanish Contracts

These topics discuss tracking Spanish contracts.

Pages Used To Track Spanish Contracts

Page Name	***Definition Name***	***Usage***
Contract Data Page	CONTRACT1_ESP	Add or update basic information about the contract between your organization and a worker, including the contract duration, type and content.
Contrata Status ESP Page	CNT_CTTA_SEC_ESP	Manage the status of Contrata communications being sent to the Employment Agency.
Contract Clauses Page	CONTRACT2_ESP	Add or update special clauses to the contract. You must have previously set up an SPEE template in the Define SPEE Templates ESP page.
Job Data Details Page	CONTRACT2_SEC_ESP	View the job data details of the contract.
Contract Signature Page	CONTRACT3_ESP	• Add or update the contract signature information. • Manage Contrata communication. • Print a contract.
AFI Events Page	CONTRACT4_ESP	Add or update AFI reporting details.
AFI Data Details Page	CONTRACT4_SEC_ESP	View or update AFI event details.
Payroll Data Page	CONTRACT5_ESP	Add or update payroll details for GP Spain customers.

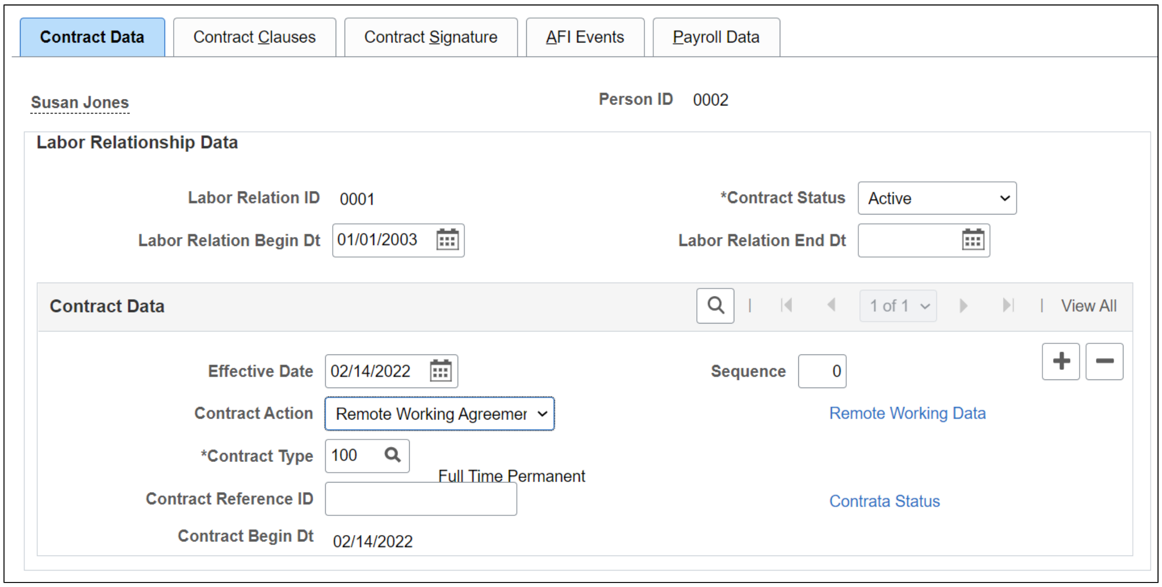
Contract Data Page

Use the Contract Data page (CONTRACT1_ESP) to add or update basic information about the contract between your organization and a worker, including the contract duration, type and content.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts ESP** > **Contract Data**

This example illustrates the fields and controls on the Contract Data page. You can find definitions for the fields and controls later on this page.



Labor Relationship Data

Field or Control	***Description***
Labor Relation ID	Displays the identifier of the labor relationship to which the contract is being associated. A person can have multiple labor relationships with the same organization during different period of time, and each of them has separate contracts defined in the system.
Contract Status	Indicates whether the contract is Active or Inactive.
Labor Relation Begin Dt	Enter the date on which the labor relationship between the person and the organization begins.
Labor Relation End Dt	Enter the date on which you expect the labor relationship to end.

Contract Data

Field or Control	***Description***
Effective Date	Enter the date from which the contract is effective.

Field or Control	***Description***
Contract Action	Select the action you need to perform. The possible actions are: • *New Contract:* Select this action to initiate a labor relationship. This action must be communicated to all Government agencies like Social Security (via AFI), Employment Agency (via Contrata), Unions (via Basic Copy of the contract), and also to the employee (via the Official Template Contract). • *Extension:* Select this action when the employee signs an Extension contract. In this case, you need to communicate the extension details to the Employment Agency via Contrata. This option is possible only for contract types that are of fixed duration and has extensions allowed. • *Termination:* Select this action to end or freeze the labor relationship. On termination of a contract, a communication must be sent to Social Security via AFI. For AFI reporting, the Termination Date is the first day in the new situation. • *Calling:* Select this action to communicate to Employment Agency via Contrata and AFI. In such cases, the employee must sign the calling contract. This option is available only for Permanent Intermittent type of contracts. • *End Calling:* Select this action when the Calling contract ends. You can select this action only after an action of calling. For Intermittent-Permanent contracts, the activity period starts with the Calling action, and the inactivity period starts with the End of Calling action. Both these actions (Calling and End Calling) must be communicated to Social Security via AFI • *Remote Working Agreement:* Select this action if the employee starts to work remotely under the organization's remote work policy. The Remote Working Agreement can be entered on the same date as the Contract begin date, or any other date after it. If the remote work begins on the contract start date, then the Remote Working Agreement information will be included in the basic copy of the contract. For remote work commencing after the contract start date, you will need to generate a copy of the basic contract as well. **Note:** By selecting this action, a link Remote Working Data is displayed.

Field or Control	***Description***
Contract Type	Select the type of legal contract to be associated with the employee. The contract type determines the contract's characteristics. The fields on the next page change depending on the type of contract you select in this field. The values selected in the **Contract Action** and **Contract Type** fields decide the fields populated in the page.
Contract Reference ID	Enter the unique identification number of the contract provided by the Spanish authorities. This field can be edited only while creating a new contract.
Contract Begin Dt	Enter the date from which the contract is effective.
Contract End Dt	Enter the date on which the contract is expected to end. This field is not available for permanent contract types.
Total Contract Duration	Displays the duration in years, months and days of the contract based on the dates mentioned in the Contract Begin Dt and Contract End Dt fields. This field is not available for permanent type of contracts.
Create AFI Action	Click the button to create an Affiliation Event for the contract. You can view the events created in the AFI Events page. This button is available when the contract action is either New Contract or Termination, as only these actions must be reported to Social Security via AFI.
Contrata Status	Click this link to track the Contrata communication status. This opens the Contrata Status ESP page.
Extension Begin Dt	Displays the effective date of contract extension. This field is visible only when the contract action is extension.
Extension End Dt	Enter the date by which you expect the extension to end. This field is visible only when the contract action is extension.
Extension Number	Displays the ordinal of the contract extension. Example values are First Extension, Second Extension, etc.

Field or Control	Description
Extension Duration	Displays the duration of the contract based on the Extension Begin date and the Extension End Date. The field displays the duration in Years, Months and Days, but is not available for permanent type of contracts.

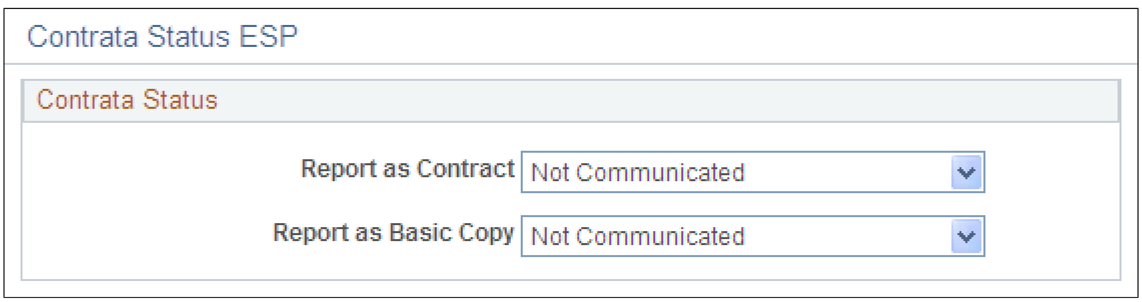
Contrata Status ESP Page

Use the Contrata Status ESP page (CNT_CTTA_SEC_ESP) to manage the communication being sent to the Employment Agency via Contrata.

Navigation:

Click the Contrata Status link on the Contract Data page.

This example illustrates the fields and controls on the Contrata Status ESP page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Report as Contract	If you are communicating information about newly created contracts, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.*
Report as Basic Copy	If you are communicating clauses of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.*
Report as Extension	If you are communicating extensions of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.* **Note:** If the Contract Action selected on the Contract Data page is *Extension*, this is the only field available on the Contrata Status ESP page.

Field or Control	Description
Report as Transformation	If you are communicating transformation of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.* **Note:** If the contract type selected in the Contract Data page is eligible for transformation, the Contrata Status ESP page displays the fields: **Report as Basic Copy** and **Report as Transformation.**

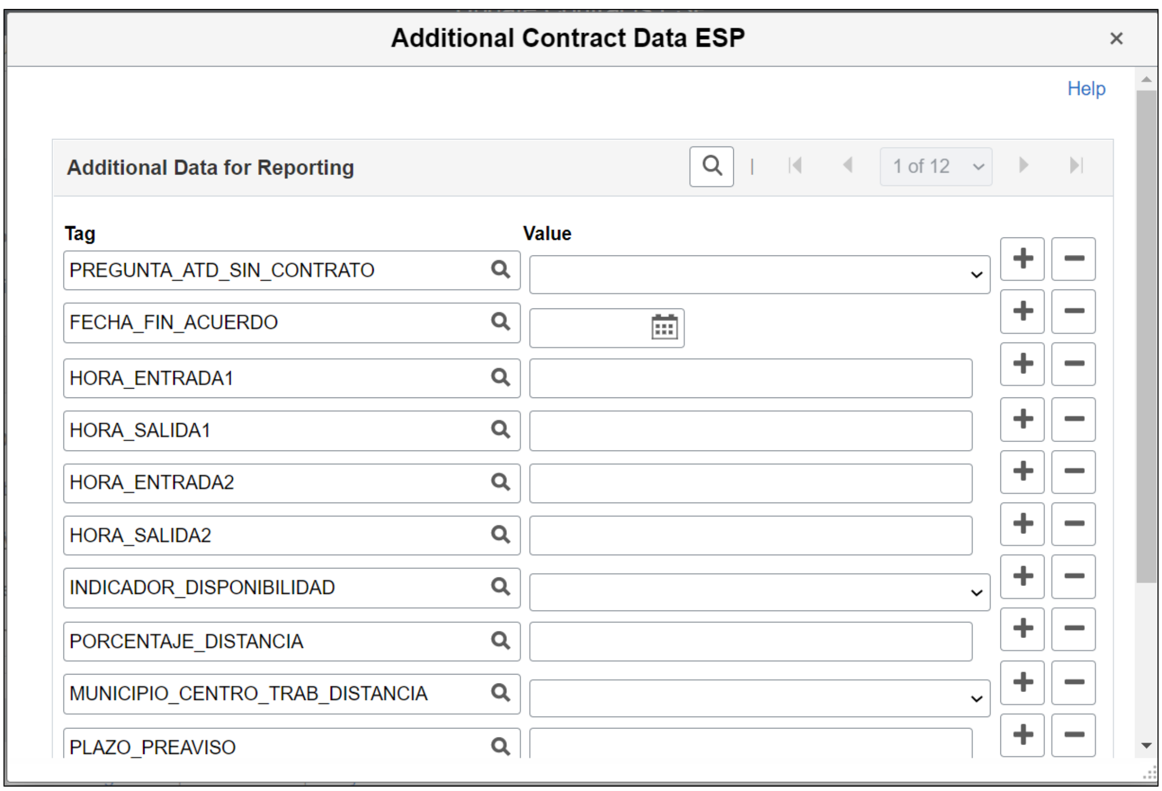
Additional Contract Data ESP Page

Use the Additional Contract Data ESP page to enter additional contract details required for remote working.

Navigation

Click the Remote Worker Data link in the Contracts Data page.

This example illustrates the fields and controls on the Additional Contract Data ESP page.



For the field PORCENTAJE_DISTANCIA, you need to enter a value with two decimals.

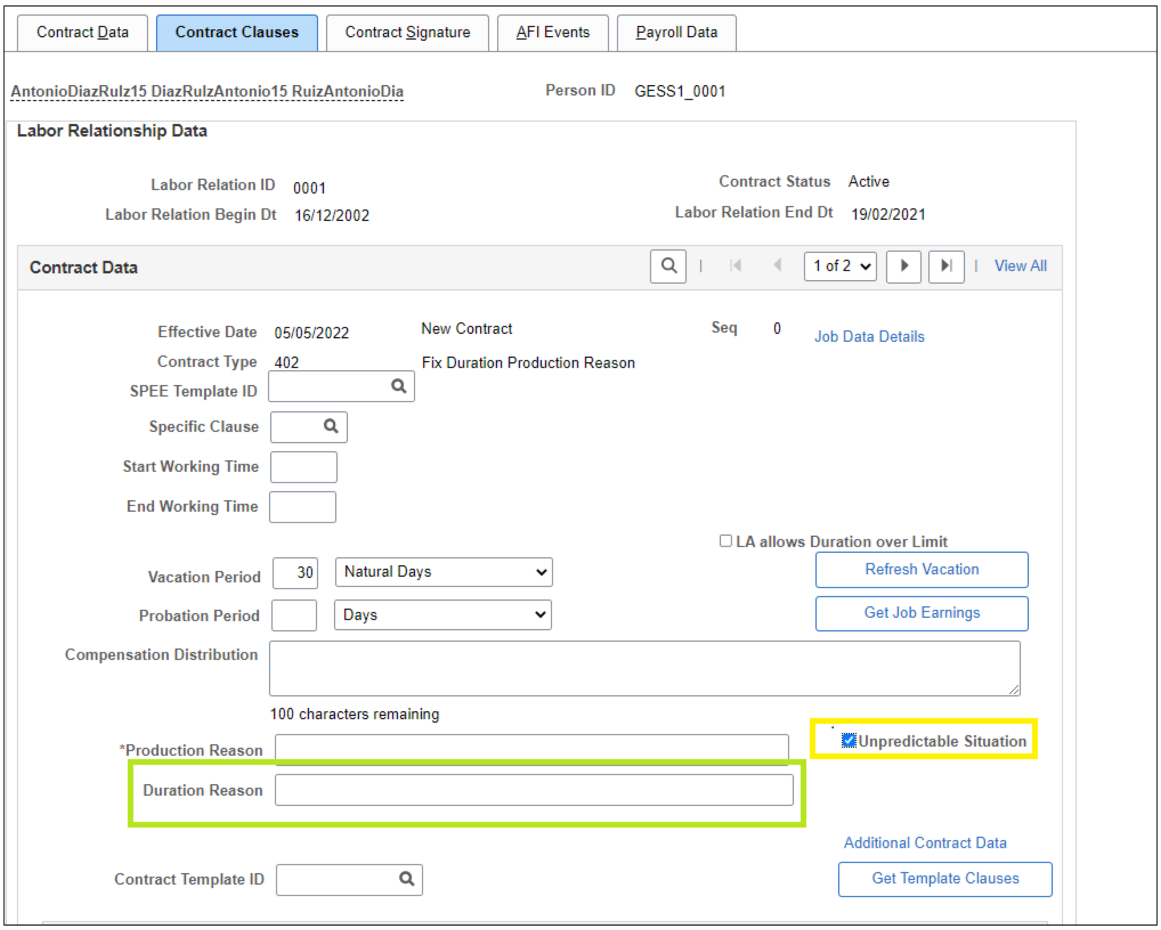
Contract Clauses Page

Use the Contract Clauses page (CONTRACT2_ESP) to add or update special clauses to the contract. You must have previously set up an SPEE template in the Define SPEE Templates ESP page.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts ESP** > **Contract Clauses**

This example illustrates the fields and controls on the Contract Clauses page. You can find definitions for the fields and controls later on this page.



Contract Data

Field or Control	***Description***
Job Data Details	Click this link to access the Job Data Details page.
SPEE Template ID	Select the template to be used for printing the contract. This template is defined in the Define SPEE Templates ESP page.

Field or Control	*Description*
Vacation Period	Use the two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *Days, Labor Days, Months, Natural Days* and *Weeks*. For example, if the vacation period is 20 work days, enter *20* in the first field, and then select *Work Days* from he options in the second field. Enter the vacation entitlement of the person per year as per the contract. You can enter the vacation period as *Days, Labor Days, Months, Natural Days* or *Weeks*.
Refresh Vacation	Click this button to enter the default value for vacation periods from the Labor Agreement page in the **Vacation Period** field.
Probation Period	If the person's contract includes a probation period, use these two fields to specify how long it is. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *Days, Months,* or *Weeks*. For example, if the probation period is six months, enter *6* in the first field, and then select *Months* in the second field.
Compensation Distribution	Enter the earning details included in the compensation.
Get Job Earnings	Click this button to retrieve the Compensation details from the Job Data page. You can update the retrieved data, by either adding or removing the earnings.
Additional Contract Data	Click this hyperlink to enter additional information related to the contract that will be used for the legal reporting. User can enter the information referring tot the corresponding Tag in the reporting file.
Contract Template ID	Select a contract template for the Contract Clauses. These templates are defined in the Contract Printing Mapping page. When you select a contract template ID, if the template has clauses associated, the system copies them to the below Contract Clauses scroll area. You can add, update or delete these clauses to suit the current requirement.

Field or Control	***Description***
Tax Incentives	Select this check box if tax incentives are applicable for the contract. On selecting this check box, the page displays the **Promotion Reason** field, where you can select the reason for the tax incentive. **Note:** This check box is visible only if you have selected a contract type that has **Tax Incentives** check box selected.
Contract with Bonification	Select this check box if bonifications are applicable for the contract. When you select this check box, the page displays the **Bonificated Collective** field, where you an select the collective for which the bonification is applicable. Bonificated collectives are applicable for specific contract types, as defined in the Define Contract Benefits ESP page. **Note:** The **Bonificated Collective** field is available only for promotion contracts
Unpredictable Situation	Select this checkbox if the temporary contract is related to an unpredictable situation.
Duration Reason	Enter a meaningful description of the relationship between the reason for the contract and its duration.
EU Fund	Enter the description of the fund that is financing the project that justifies this temporary contract. This field is displayed only for contract types 406 and 506.
Financed by EU	Select this checkbox if the temporary contract is related the execution of a project financed by funds from European Union. This field is displayed only for contract types 406 and 506.
Project	Enter the description of the project that justifies this temporary contract. This field is displayed only for contract types 406 and 506.

Contract Clauses

Field or Control	***Description***
Seq Nbr	Enter the order in which you would like to add the contract clauses to the contract.
Clause	Select a contract clause from among those you have defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license
Clause Status	Select the status of the clause to indicate if it is *Optional* or *Required.*
Long Descr	Enter a description of the clause. The system uses this while printing the contracts.
Comment	Enter your comments regarding the clause.

Note: For contract printing, you need to select *PE-170* from the **SPEE Template ID** field on the Contract Clauses page. Based on the contract type selected, the page displays several additional fields that are used for the contract printing functionality. Some of the common scenarios and the fields available are explained below:

Contract Employees - Full Time

The following table lists the additional field seen on the page, when the contract type is Full Time.

Field or Control	***Description***
Start Working Time and End Working Time	Enter the time when the person’s work hours start and end. Use the format hh:mm for hours and minutes.

Contract Employees - Part Time or Fixed Duration

The following table lists the additional field seen on the page, when the contract type is Part Time or Fixed Duration.

Field or Control	***Description***
Part Time Hours Minutes	Enter the number of hours worked as a part time employee. If the part time hours is not an integer, you can specify it in minutes

Field or Control	***Description***
Frequency	Enter the frequency in which the part time hours are followed. You can set the frequency to *Daily, Weekly, Monthly,* or *Yearly.*
Compared with	Select the schedule to which you need to compare. You can select either *Full Time Schedule, Labor Agreement Max Schedule,* or *Legal Max Schedule.*
Maximum Hours	Enter the maximum hours for the selected schedule.
LA allows Duration above Limit	Select this check box if the contract exceeds the duration limit and the labor agreement allows it. The check box is available when the contract is a fixed duration contract.
Permanent Intermittent	Select this check box if the contract is a Permanent Intermittent contract.
Schedule Distribution	Enter the time distribution applicable for the contract.

Contract Employees - Permanent

The following table lists the additional field seen on the page, when the contract type is Permanent.

Field or Control	***Description***
Relief Contract	If the Permanent Contract is signed to relieve an employee in a situation of partial retirement, select this check box.
Replaced Empl Id	Enter the Employee ID of the person being relieved. This field is visible if the **Relief Contract** check box is selected.
Proposed Job Code	Enter the job code to be assigned to the new employee. By default, the job code of the employee being relieved is displayed; but you can modify it, if needed.

Contract Employees - Fixed Duration

The following table lists the additional field seen on the page, when the contract type is Fixed Duration.

Field or Control	*Description*
Service Reason	Enter the service reason for the contract. This field is available only for service contracts.
Production Reason	Enter the seasonal peak production reason for the contract. This field is available only for production reason contracts.
Replaced Reason	This field is available only for interinity contracts. Select the substitution reason for the Fix Duration contract. When you select the replaced reason, the page displays the **Replaced Empl ID** and the **Proposed Job Code** fields.
Replaced Empl ID	Select the employee ID of the person being relieved.
Proposed Job Code	Enter the job code in which the new employee will develop their role. The system proposes the job code of the relieved employee, but you can modify it, if needed.

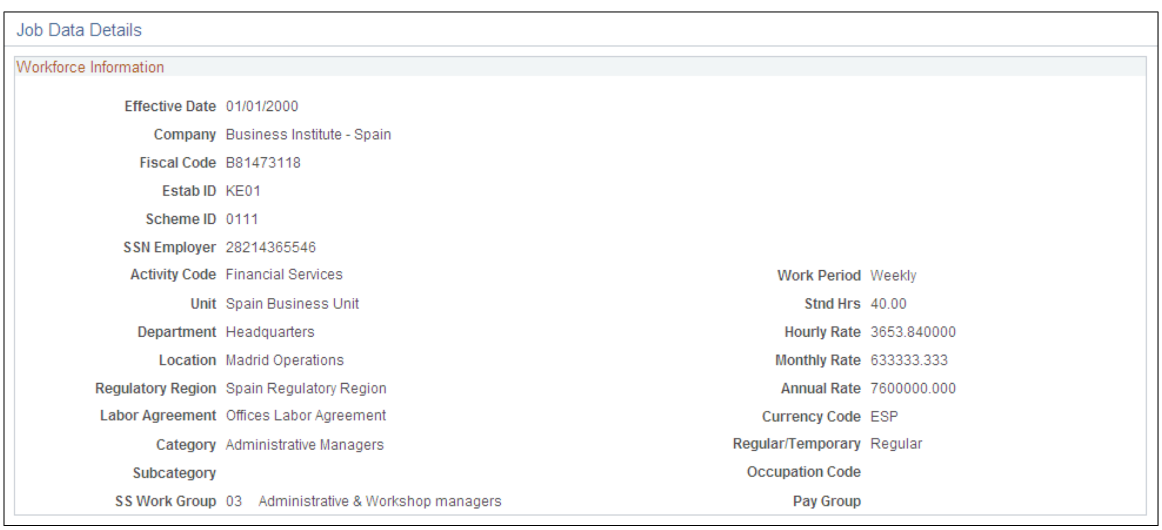
Job Data Details Page

Use the Job Data Details page (CONTRACT2_SEC_ESP) to view the job data details.

Navigation:

Click the **Job Data Details** link on the Contract Clauses page.

This example illustrates the fields on the Job Data Details page.



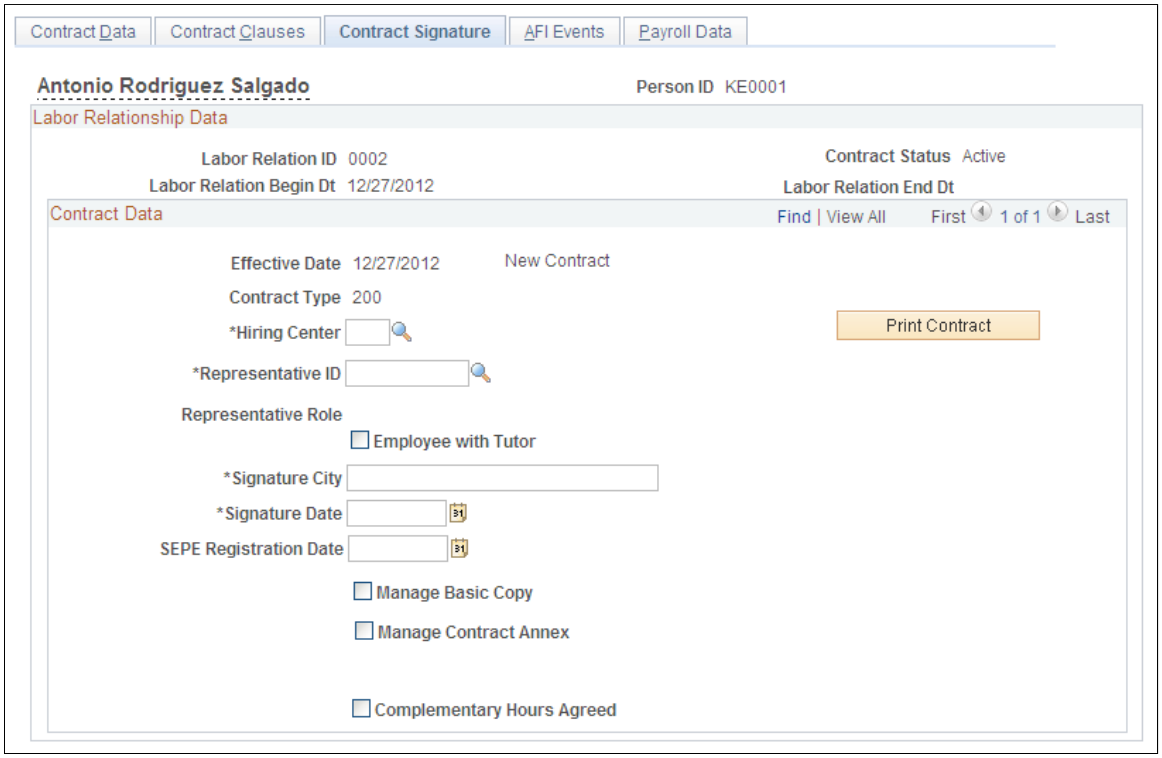
Contract Signature Page

Use the Contract Signature page (CONTRACT3_ESP) to add or update the contract signature information. You can also manage the Contrata communication being sent to Employment Agency. The page also provides you an option to print the contract.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts ESP** > **Contract Signature**

This example illustrates the fields and controls on the Contract Signature page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Print Contract	Click the button to print a hard copy of the contract, based on the SPEE template selected.
Hiring Centre	Select the hiring center that is responsible for hiring the employee.
Representative ID	When you select the representative ID, the role of the person is displayed in the **Representative Role** field.
Employee with Tutor	If the employee is having a legal tutor, select this check box. You need to then specify the ID and a role description of the employee's tutor in the **Tutor ID** and **Tutor Role** fields.

Field or Control	***Description***
Signature City	Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the name of the city here.
Signature Date	Enter the date on which the contract was signed.
SEPE Registration Date	Enter the date on which the person has registered with the employment agency (SEPE).
Manage Basic Copy	Select this check box to manage the basic copy of a contract. The basic copy is automatically generated, but it allows you to override the content. On selecting the check box, the page display the following fields and buttons: **Signature Type, Create Basic Copy, Print Basic Copy,** and **Basic Copy Text.**
Signature Type	Select the signature type from the list of values. The values available are: *Declined to Sign, Not exist Legal Representative, Sent without Copy,* and *Signed by Legal Representative.*
Create Basic Copy	Click this button to automatically generate a proposal of basic copy. You can view the details in the **Basic Copy Text** field, and if needed, can override the details.
Print Basic Copy	Click this button to print a hard copy of the basic copy.
Basic Copy Text	When you click the **Create Basic Copy** button, this field is automatically populated with the contract details used in the Contrata communications. However, you can override the details.
Manage Contract Annex	Select this check box to manage the contract annexes.
Previous Status	In case of a Relief contract, select the source of the new employee in this field. If you select *Unemployed* in this field, the page displays the **Employment Office Code** field.
Employment Office Code	Enter the employment office where the new employee is registered.
Complementary Hours Agreed	Select this check box if there is an agreement about complementary hours. The check box is visible only for Part Time type of contracts. On selecting this check box, the page displays the following additional fields: **Maximum Annual Hours, Agreed Hours Percent,** and **Notification Days.**

Field or Control	*Description*
Maximum Annual Hours	Enter the maximum number of complementary hours that the employee can avail per year. This is applicable only if there is a complementary hours agreement in place.
Agreed Hours Percent	Enter the percentage of hours agreed by the employee. This is applicable only if there is a complementary hours agreement in place.
Notification Days	Enter the number of days to be notified. This is applicable only if there is a complementary hours agreement in place.

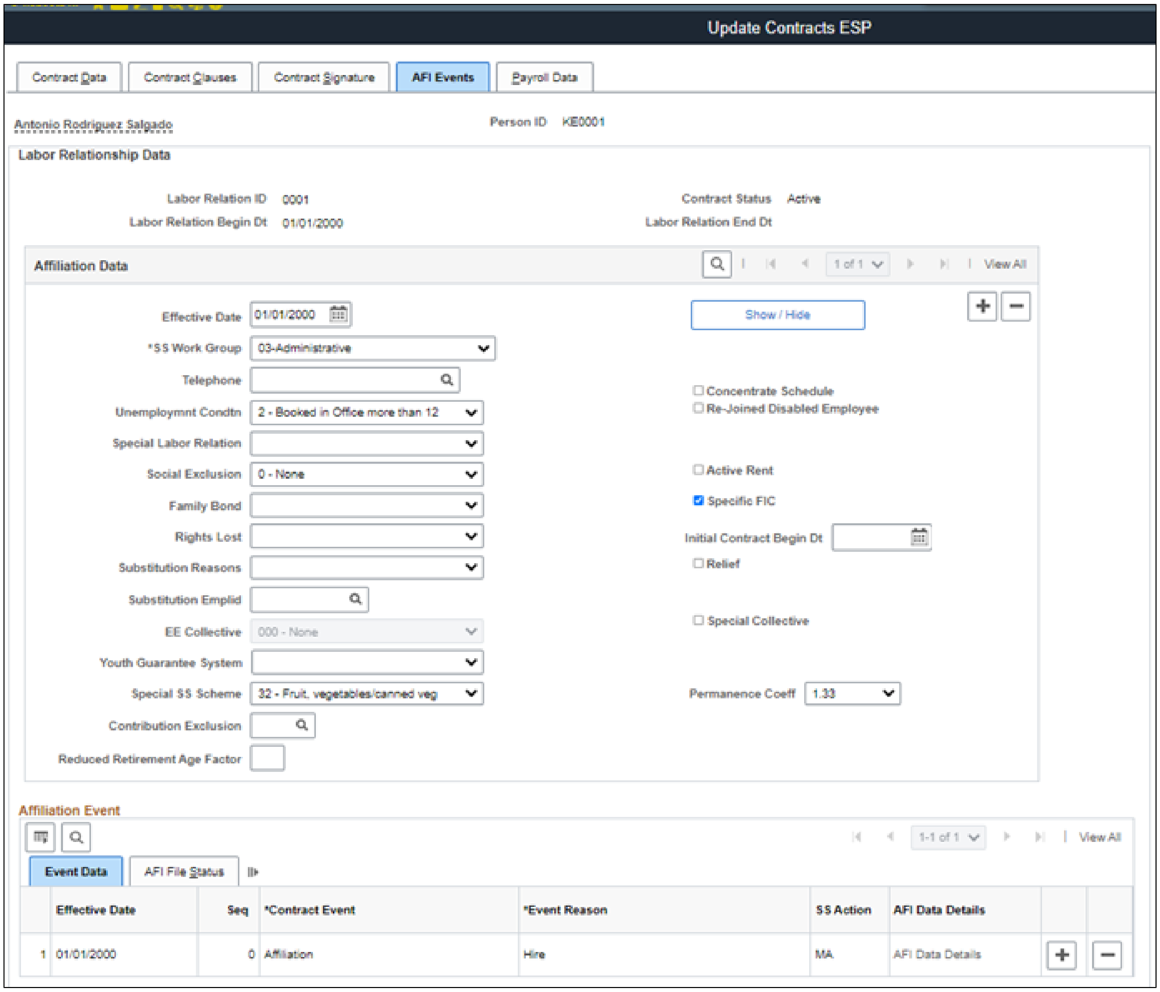
AFI Events Page

Use the AFI Events page (CONTRACT4_ESP) to add or update AFI reporting details.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts ESP** > **AFI Events**

This example illustrates the fields and controls on the AFI Events page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Show/Hide	Click the button to show or hide the affiliation data fields.
SS Work Group	Select the Social Security group to which the person belongs.
Telephone	Select the primary phone number for the employee. All phone numbers and types collected from the person during hiring are listed here.
Unemploymnt Condtn	If you are hiring an unemployed person, you need to select the appropriate unemployment condition in this field.
Special Labor Relation	In case of a special labor relationship, select the appropriate value in this field.

Field or Control	*Description*
Social Exclusion	If the person comes from an environment of gender violence or social exclusion, select an appropriate value in this field.
Family Bond	You can select family ties, if any.
Rights Lost	In case of loss of rights, select the reason in this field.
Substitution Reasons	Select the reason why you are substituting the person. Based on the data entered in the previous pages, the field displays a substitution reason, but you can override it.
Substitution Empl ID	Select the ID of the substitute worker. Based on the data entered in the previous pages, the field displays a substitution Employee ID.
Special Collective	Select the check box to identify employees belonging to special collective. Whenever the user select this field, the system enables the field **EE Collective**, to enter the specific collective the employee belongs to.
EE Collective	Identify the specific collective the employee belongs to. Possible values are: Advicer w/ Work Contract, Advicer w/ Commercial Contract.
Special SS Scheme	Select the special scheme inside the general scheme.
Permanence Coeff	If the Special Scheme selected is 32, then the **Permanence Coeff** field is also displayed to select the value associated with it.
Re-joined Disabled Employee	Select the check box to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.
Active Rent	Select the check box to indicate that the worker receives a specific support called *Income for placement*.
Specific FIC	Select the check box to indicate that the contract duration is less than 7 days.
Contract Begin Date	When you select Specific FIC, the page displays the **Contract Begin Date** field.
Relief	Select the check box to indicate that the contract is a relief contract. By default, the check box is either selected or not, based on the data entered in the previous pages.

Field or Control	***Description***
Contribution Exclusion	Select the value that corresponds to the Contribution exclusion that applies to the employee.
Reduced Retirement Age Factor	Select the percentage to be applied to employees belonging to collectives that are eligible for a reduction on the age of retirement.

If you have generated AFI events from the Contract Data page, you can view them in the fields below. You can also generate new Affiliation Events using the fields below.

Affiliation Event

Field or Control	***Description***
Contract Event	Select the contract event that triggers the communication. The values available are: • *Affiliation:* Use this event to communicate a new hire or rehire, or to add an employee to the social security system. • *Change in Contract:* Use this event to communicate a change in the data of the social security system, like a change in contract, a strike, a schedule reduction, etc. • *Unregister:* Use this event to communicate a termination or unregistering of an employee from the social security system. • *Additional Situations:* Use this event to communicate a period of special situations like a long term leave.
Event Reason	Select the event reason to be stored or communicated. The values available for this field vary based on the contract event selected.
AFI Data Details	Click this link to enter additional data for AFI reporting. The link is visible depending on the contract event and the event reason selected.

AFI File Status

The AFI File Status tab helps you manage the AFI communication status.

Field or Control	***Description***
Communicate By	Select whether you are communicating the selected row of AFI data for the employee by entering the data online through the social security web site, or by generating an AFI File that includes the data. By default, the field displays *AFI File.* You can select *On Line,* if you do not want the employee AFI data to be eligible for communication through the AFI file generation process.
Time Stamp	For AFI data communicated by AFI file, the field displays the time and date of the AFI flat file generation. In case of AFI data communicated online, the field displays the system time and date, which you can modify.
AFI File Name	If you have already processed the row of AFI data for the employee in an AFI file, the field displays the name of that file. Otherwise, the field is unavailable unless you select *On Line* in the **Communicate By** field. Having a value in this field ensures that the AFI file generation process does not include this data in other AFI files that you generate. You can liberate this data row from the AFI flat file, and thus make the data available again for inclusion in an AFI flat file, by unlinking the data row from the AFI file name through the Review AFI Files page.
Node Status	The field displays the communication status for reporting the employee's AFI data. Possible values are: • *Included in AFI:* The row of AFI data has been included in an AFI file. The AFI file name is available on the Reporting tab. • *Not Communicated:* The row of AFI data that has not been communicated to social security.

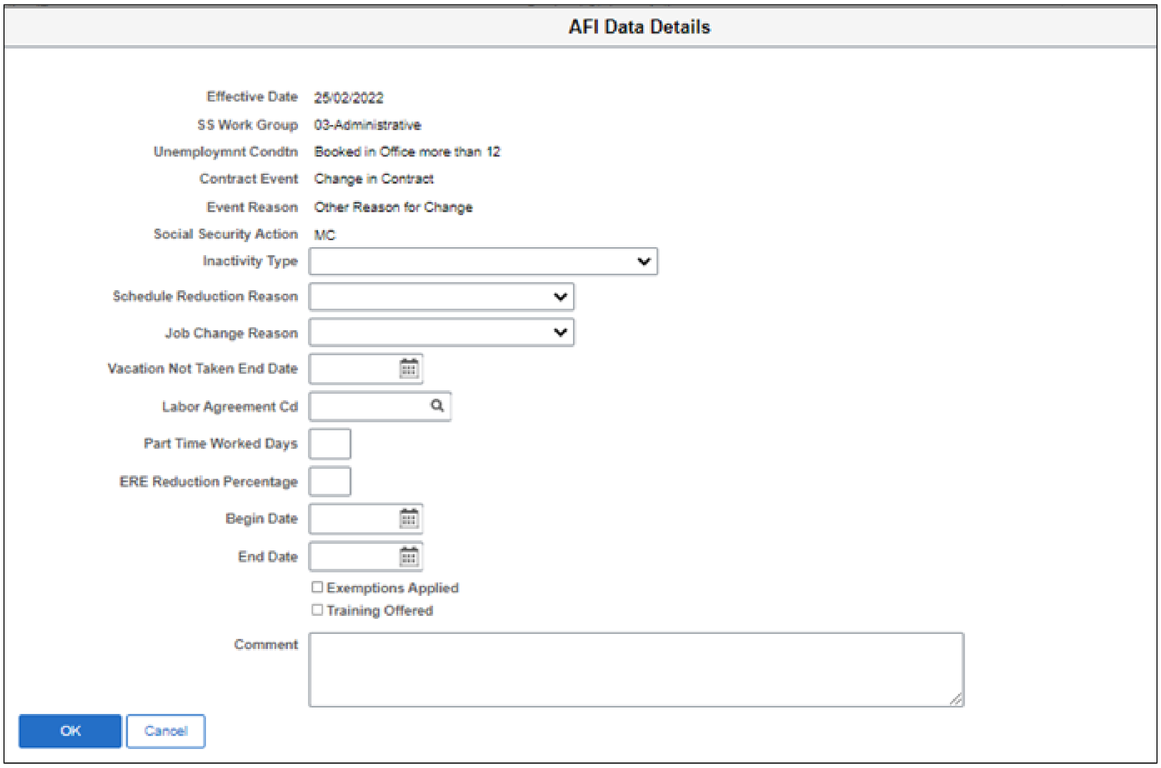
AFI Data Details Page

Use the AFI Data Details page (CONTRACT4_SEC_ESP) to view or update the AFI event details.

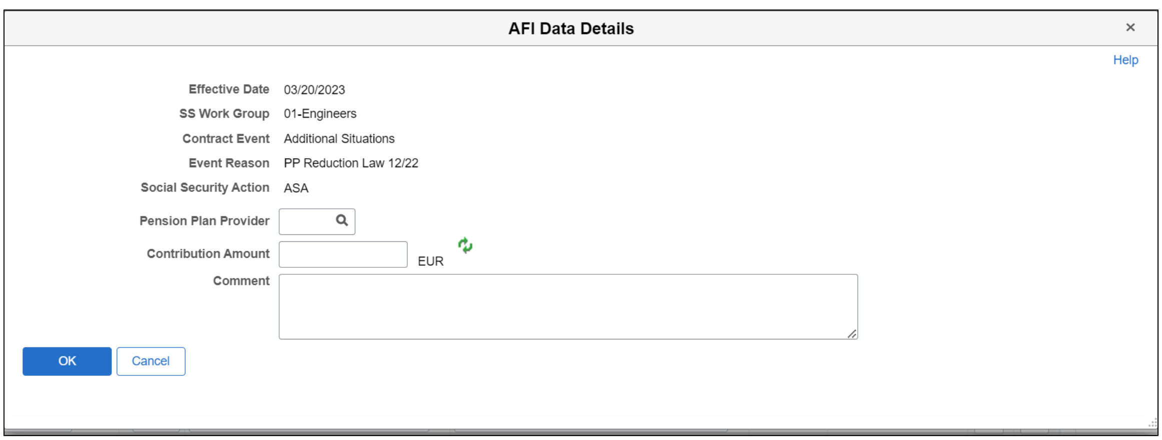
Navigation:

Select the AFI Data Details link on the AFI Events page.

This example illustrates the fields and controls on the AFI Data Details page.



This example illustrates the fields and controls on the AFI Data Details page (Spain). This page allows the user to complete manually the information about the employer contribution to pension plans:



Click the Refresh button to read the information from Payroll results.

Note: This option is only available if the customer has Global Payroll Spain installed, and patch 34911057 applied. This information will be printed in a new segment ODL (Otros Datos Laborales).

Field or Control	***Description***
Inactivity Type	Select the type of inactivity in this field. You can use this field to communicate strikes, ERE periods, or any other inactivity periods. The value in this field indicates that the worker is inactive, but must remain registered in the social security system.
Schedule Reduction Reason	Use this field to communicate the type of legal custody or the schedule reduction reason.
Schedule Reduction Pct	If you have selected a schedule reduction reason in the above field, enter the percentage of schedule reduction.
Part Time Initial Percentage	In case of Schedule reduction of an employee with part time contract, user needs to inform the initial FTE.
Partial Strike Activity Coeff	In case of Partial Strike, enter the activity coefficient as a decimal, with three figures. For example, if the coefficient is 0. 40, you need to enter 400 in the field.
Job Change Reason	Select the reason for which the worker has changed job. For example, risk during pregnancy or occupational disease.
Vacation Not Taken End Date	Enter the date that would extend paid leave, and not taken. This is applicable in case of un-registration due to a termination.
Labor Agreement Cd	Enter the code applicable for the employee collective.
Begin Date	Enter the start date for the following situations: • For the registration, modification and removal of contingent workers or assigned, enter the start date of the contract or assignment. • For additional situations, enter the start date of the period of this situation. • For annotation of days worked, enter the start date of the period referred to in days worked.

Field or Control	*Description*
End Date	Enter the end date for the following situations: • For the registration, modification and removal of contingent workers or assigned, enter the end date of the contract or assignment. • For Additional Situations, enter the end date of the period of this situation. • For annotation of days worked, enter the end date of the period referred to in the days worked.
Part Time Worked Days	In case of part-time contracts, enter the actual number of days worked in a given month.
Exemption Applied	Select this check box in case of Inactivity type like ERTE when company will apply some exemption to the Social Security contributions.
Training Offered	Select this check box to confirm that company has offered training to the employees during inactivity period of ERTE.
Comments	Enter any comments to be saved with the AFI details.

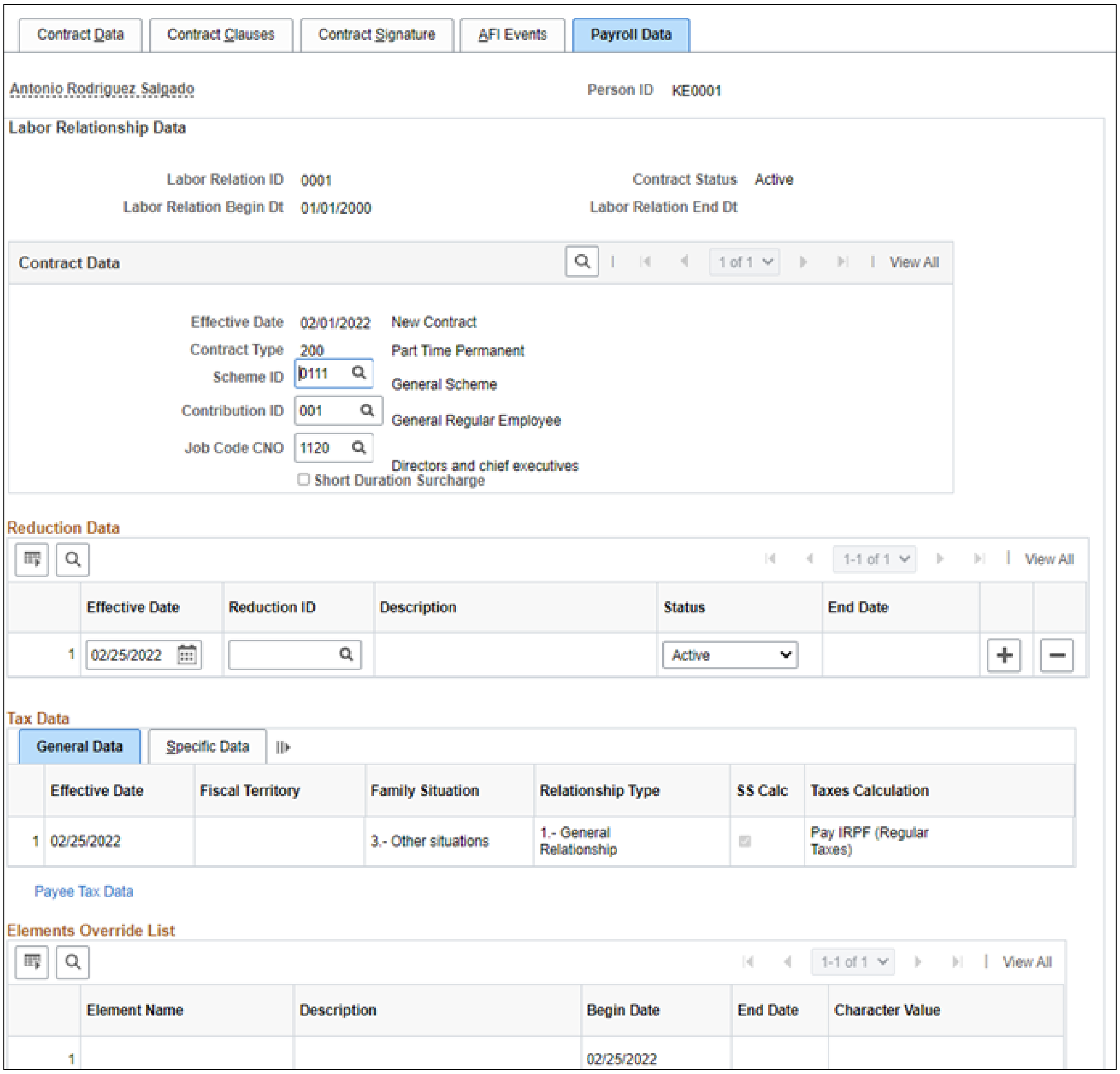
Payroll Data Page

Use the Payroll Data page (CONTRACT5_ESP) to add or update payroll details for GP Spain customers.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Update Contracts ESP** > **Payroll Data**

This example illustrates the fields and controls on the Payroll Data page.



Field or Control	***Description***
Scheme ID	Select a social scheme ID for the selected contract.
Contribution ID	Select a social security contribution ID for the selected contract and scheme ID. The social security calculations use the scheme ID and the contribution ID to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.
Job Code CNO	Select a job code CNO for the selected contract. Each job code is mapped to a Job Code CNO value (National Occupation Code). However, if needed, you can override the Job Code CNO using this field.

Field or Control	***Description***
Short Duration Surcharge	Select this check box to indicate that this contract will be affected by the additional Social Security contribution due short duration.

Reduction Data

Field or Control	***Description***
Effective Date	Enter the effective date of the specified reduction.
Reduction ID	If the worker is entitled to a reduction in social security contributions, select the reduction that applies. You can define reduction ID values on the Reductions ESP component. See the "Reduction Page" (PeopleSoft Global Payroll for Spain) topic.
Description	This field displays the description of the reduction ID selected in the above field.
Status	Select the status of the specified reduction. The values available are *Active* and *Inactive*.

Tax Data

The Tax Data group box displays the details for an employee as they relate to tax calculation. If you want to change data in this group box, click the **Payee Tax Data** link. A new window opens up to make the changes on the Maintain Tax Data page. After making changes in the page, you need to refresh the data by clicking the **Refresh** link. The Refresh link is visible only after clicking the **Payee Tax Data** link.

Field or Control	***Description***
Fiscal Territory	Displays the fiscal territory to which the employee pays tax. The values available are: *Alava Fiscal Territory, Guipuzcoa Fiscal Territory, Navarra Fiscal Territory, State Fiscal Territory,* and *Vizcaya Fiscal Territory.*
Family Situation	Displays the family situation of the employee as defined by the government. This is applicable only if the fiscal territory is *State Fiscal Territory*. The values available are: *With fiscal dependent, With spouse to support,* and *Other situations.*

Field or Control	*Description*
Relationship Type	Displays the contract type as agreed between the employee and the company. The values available are: *General Relationship, Less 1 year relationship,* and *Special Relationship.*
SS Calc	Determines how the payroll process calculates social security contributions for the employee and the employer. PeopleSoft Global Payroll for Spain provides functionality to allow reimbursement of the amount paid directly by the employee to the social security agency. The system selects this check box by default. If you do not want the payroll process to calculate social security contributions, deselect this check box.
Taxes Calculation	Displays how the payroll process calculates taxes for the employee. You can find more details in the “Transnational Mobility Page” (PeopleSoft Global Payroll for Spain) topic.
Payee Tax Data	Click this link to open the Maintain Tax Data page and edit the details. “Maintain Tax Data Page” (PeopleSoft Global Payroll for Spain).

Elements Override List

This group box allows the user to track the elements used in the last payroll calculation for this employee. If you want to change the data in this group box, you can click the **Element Override List** link and access the “Supporting Elements Page” (PeopleSoft Global Payroll) in a new window. After making the required changes, you can refresh the data by clicking the **Refresh** link. The **Refresh** link will be visible only after clicking the **Element Override List** link.

Entering Temporary Assignments

These topics provide an overview of and discusses temporary assignments and substantive jobs.

Pages Used to Process Temporary Assignments

Page Name	*Definition Name*	*Usage*
Work Location Page	JOB_DATA1	Enter a temporary assignment (see Entering a Temporary Assignment).
Add Additional Assignment Page	PER_ORG_INST_ASGN	Add a partial temporary or additional assignment (see Adding a Partial Temporary Assignment)

Page Name	Definition Name	Usage
Reactivate/Termination Update Page	RC_TEMP_ASSGN_UPDT	Run the temporary assignment termination and substantive job reactivation process.
Temp Assignmnt w/out End Date Page	RUNCTL_TAS001	Run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.
Temp Assignments Due Report Page	RUNCTL_TAS002	Run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

Understanding Temporary Assignments and Substantive Jobs

These topics discuss:

- Substantive jobs.
- Temporary assignments.
- Data row impacts.
- Additional considerations for temporary assignments and data processing.

Substantive Jobs

The substantive job assignment is the worker's original job, created when the first employment or contingent worker instance was added.

Temporary Assignments

When a worker covers the responsibilities of another job besides the substantive job, the worker works a temporary assignment. Temporary assignment data must be tracked the same way that substantive job data is tracked.

For example, a person hired into a teaching appointment takes this as the substantive job. The person then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the person takes a temporary assignment on a partial basis. The person might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The person cannot work beyond the forty-hour workweek, but any combination of assignments might be entered to fill the forty hours.

Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting *Temporary Assignment* as the action or reason, the system inserts a second data row that puts the substantive job on hold. When a data row has been inserted by the system, the word *system* appears next to the employment record number (ERN) when viewed later. These data rows show an action or reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

The substantive job retains its ERN while it is suspended and the temporary assignment is identified by a new ERN. This process enables the system to uniquely identify both job data records and maintain them simultaneously.

Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When position data changes, the system updates position data for all workers in the affected position regardless of whether the assignment is temporary or substantive.

  This update does not alter the active or inactive status of the workers in the affected position.

  Similarly, when the substantive position changes, the system does not change the temporary assignments for the worker. The only exception is the unlikely possibility that a worker's temporary and substantive assignments are in the same position.

- The worker's pay rate matches the active assignment.

  If a worker works multiple assignments beyond the substantive job, the system prorates the pay for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. To change the pay rate, you can override the position data manually on the Compensation Data page.

Note: Use the Job Data component pages for creating temporary assignments. For temporary assignments, to put the substantive job on hold, the handler Copy_SubstantiveJob and WORKFORCE_SYNC service operation must be active on the PERSON_DATA Message Channel, which comes with the PeopleSoft Application Messaging feature.

Related Links

"Identifying Integrations for Your Implementation" (Application Fundamentals)

Entering a Temporary Assignment

Use the Work Location page (JOB_DATA1) to enter a temporary assignment.

Navigation:

Workforce Administration > **Job Information** > **Job Data** > **Work Location**

To enter a temporary assignment:

1. Locate the substantive job that will be put on hold during the temporary assignment.

2. Insert a new data row with the following parameters:

   - Enter the effective date that the temporary assignment begins.
   - Enter *Temporary Assignment* in the **Action/Reason** field.

     When you use this value in the **Action/Reason** field, the system suspends the worker's substantive job. The system also transfers the substantive job data, including payroll and benefits information, to the next job record (for the temporary job) for this worker. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.
   - Enter the temporary assignment position number, if applicable.

3. (Optional) On the Job Data − Job Information page **(Workforce Administration > Job Information > Job Data > Job Information)** enter the termination date for the temporary assignment in the **Expected Job End Date** field.
4. (Optional) Select the **End Job Automatically** check box to end the job on the termination date.

   This action also reactivates the substantive job when you run the Reactivation/Termination process.
5. Select the type of duties in the **Duties Type** field for this temporary assignment.

Note: You must enter the expected job end date *and* select the **End Job Automatically** option for the Reactivation/Termination process to run automatically for each assignment. If you do not complete these fields, the termination of the temporary assignment and reactivation of the substantive job must be handled manually.

Whereas the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation Data page. You should make this adjustment while creating the temporary assignment. When you save this information, the system suspends the substantive position.

Adding a Partial Temporary Assignment

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job that fills the remaining hours. For example, an employee who is assigned to a temporary position that requires only 10 hours a week retains the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Add Additional Assignment component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—equal 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you must manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If a worker has multiple substantive positions and is assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the action or reason.

Note: When assigning any combination of temporary assignments, you can still select the **End Job Automatically** check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting when the temporary assignment has ended.

Related Links

Adding Additional Assignments

Reactivate/Termination Update Page

Use the Manage Assignments Termination page (RC_TEMP_ASSGN_UPDT) to run the temporary assignment termination and substantive job reactivation process.

Navigation:

Workforce Administration > **Job Information** > **Temporary Assignments** > **Manage Assignments Termination** > **Manage Assignments Termination**

Complete the **Company** and **Expected Job End Date up to** fields and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and to reactivate substantive positions. This process inserts new data rows into the job data record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job), and the designation *system* next to the employee record number when viewed later.

Temp Assignmnt w/out End Date Page

Use the Temp Assignmnt w/out End Date page (RUNCTL_TAS001) to run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.

Navigation:

Workforce Administration > **Job Information** > **Temporary Assignments** > **Temp Assignmt w/out End Date** > **Temp Assignmt w/out End Date**

Temp Assignments Due Report Page

Use the Temp Assignments Due Report page (RUNCTL_TAS002) to run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

Navigation:

Workforce Administration > **Job Information** > **Temporary Assignments** > **Temp Assignments Due Report** > **Temp Assignments Due Report**

Tracking Teleworkers

These topics provide an overview of and discusses the teleworker tracking functionality and prerequisites.

Pages Used to Enter Telework Details

Page Name	***Definition Name***	***Usage***
Maintain Teleworkers - Telework Status Page	TELEWORK_STATUS	Capture the telework dates and recurrence information. Identify if the telework arrangement is due to a permanent or temporary disability. Only temporary disabilities are identified here. Permanent disabilities should be captured under Personal Information, Disability, Disabilities.
Maintain Teleworkers - Location Page	TELEWORK_LOCATION	Identify the worker's actual work location when telecommuting.
Maintain Teleworkers - Agreement Page	TELE_AGREEMENT	Note how telecommuting equipment and services costs are handled, and monitor and track status changes associated to a telework request.

Note: Teleworker pages have been replaced by pages of the Remote Worker feature in Fluid. For more information, see (Fluid) Managing Remote Worker Information and "Managing Remote Worker Requests as an Employee using Fluid" (PeopleSoft eProfile).

Understanding Tracking Teleworkers

Telecommuting is often a recruiting and retention factor for many organizations. The teleworker functionality in Human Resources enables you to track jobs, positions, and workers that are allowed to work remotely. This feature is also useful for US customers that may base local or state tax based on a person's typical work location.

This feature addresses US Federal Government regulations that require federal organizations to provide the U.S. Congress with information regarding legislatively-required teleworker data.

Note: Agreement details can be captured as a contract within Contract Administration or documented in other forms and locations, depending upon your organization's rules and policies regarding teleworkers and telecommuting. This feature only captures the fact that there is an agreement in place.

Prerequisites

Before you can use the teleworker functionality with your employees and contingent workers, you must:

- Identify jobs eligible for telework arrangements.

Use the Available for Telework field on the Job Code Table - Job Code Profile page to indicate that a job is available for telework.

See “Job Code Profile Page” (Application Fundamentals).

- Identify positions eligible for telework arrangements, if your organization uses the Position Management business process.

  Use the Available for Telework field on the Position Data - Specific Information page to indicate that a position is available for telework.

  See “Position Data - Specific Information Page” (PeopleSoft Human Resources Manage Positions).

- Specify any telework locations.

  Your organization may have dedicated locations for the express purpose of teleworkers. A location may also be considered a "Telework Location" if staff that may not normally report out of that location are able to work from that office. Indicate this using the Telework Location field on the Location Profile page.

  See “Location Profile Page” (Application Fundamentals).

Maintain Teleworkers - Telework Status Page

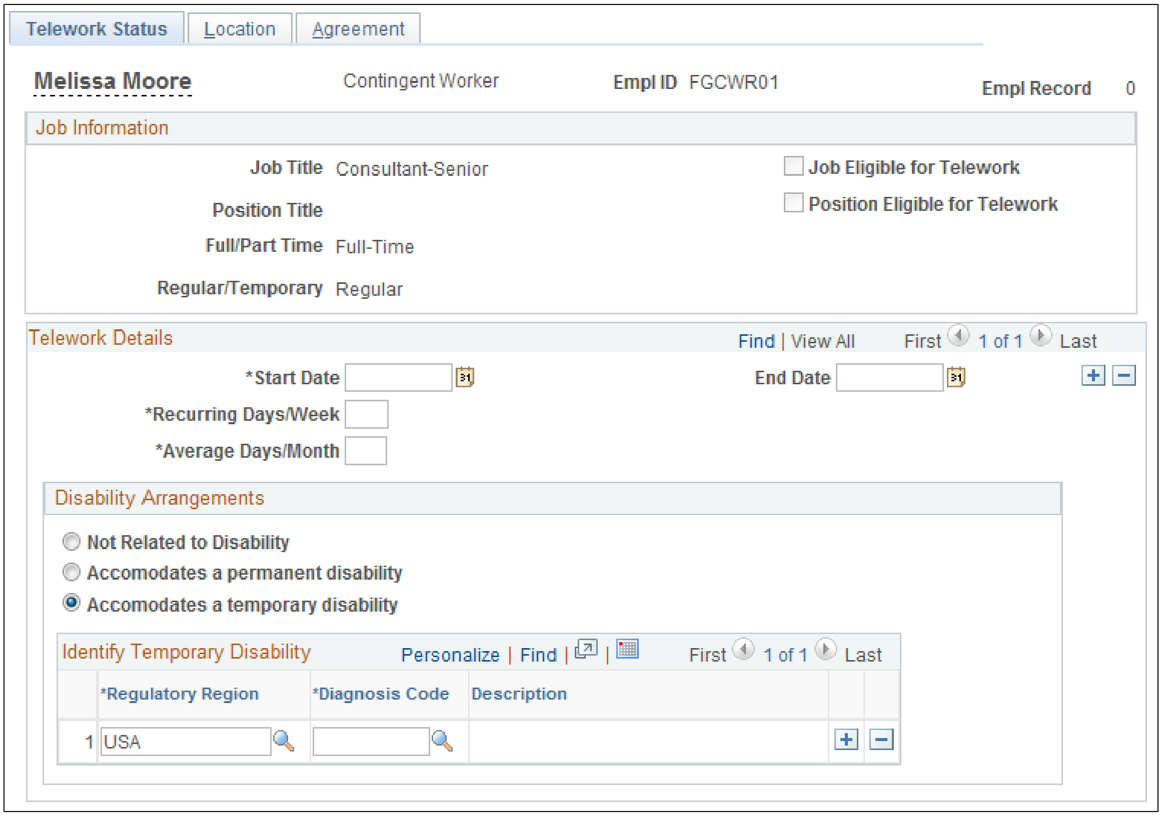
Use the Maintain Teleworkers - Telework Status page (TELEWORK_STATUS) to capture the telework dates and recurrence information.

Identify if the telework arrangement is due to a permanent or temporary disability. Only temporary disabilities are identified here. Permanent disabilities should be captured under Personal Information, Disability, Disabilities.

Navigation:

Workforce Administration > **Job Information** > **Maintain Teleworkers** > **Telework Status**

This example illustrates the fields and controls on the Maintain Teleworkers - Telework Status page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Job Eligible for Telework	Displays as selected if the Available for Telework field is selected at the Job Code
Start Date	Enter the date that the telework arrangement begins.
End Date	Enter the date that the telework arrangement is anticipated to end. No end date implies that this arrangement is on-going.
Recurring Days/Week	Enter the anticipated days per week that the teleworker works remotely. The maximum value is 7.
Average Days/Month	Enter the anticipated days per month that the teleworker works remotely. The maximum value is 31.
Disability Arrangements	Select an option to specify whether this teleworker arrangement is to suit a person's permanent or temporary disability. Select **Accommodates a temporary disability** to display the Identify Temporary Disability region.

Field or Control	Description
Identify Temporary Disability	Enter information regarding the temporary disability. This is an existing grid from the Disabilities component on the Accommodations Request (ACCOMM_REQUEST) page. **Note:** PeopleSoft captures a person's permanent disabilities in other components. Due to the potentially sensitive and private nature of that information, it is not displayed in this component.

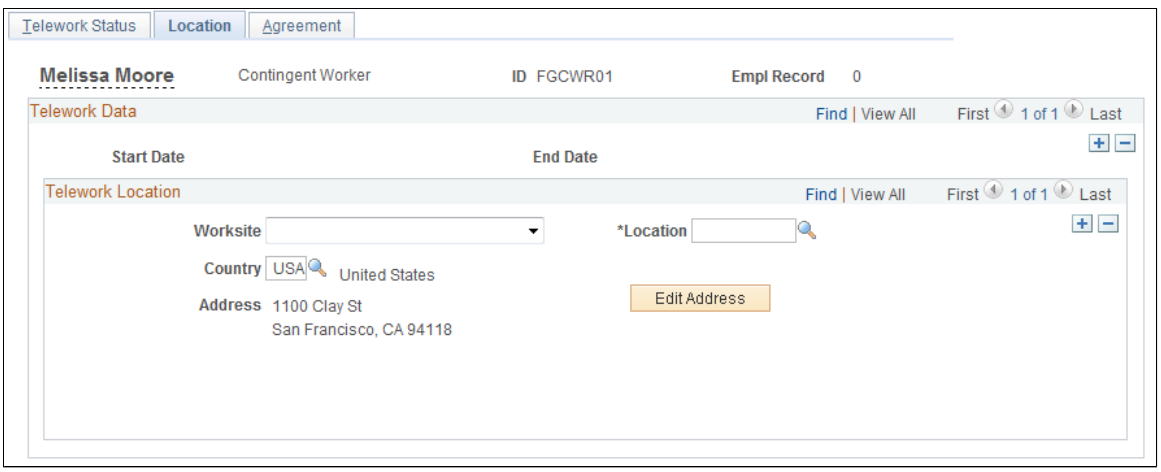
Maintain Teleworkers - Location Page

Use the Maintain Teleworkers - Location page (TELEWORK_LOCATION) to identify the worker's actual work location when telecommuting.

Navigation:

Workforce Administration > **Job Information** > **Maintain Teleworkers** > **Location**

This example illustrates the fields and controls on the Maintain Teleworkers - Location page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Worksite	Choose the regular worksite for this teleworker. Values are *Home, Other,* or *Telework Location.*
Location	Select the teleworker's commuting location, if the worksite is a designated as Telework Location. The page displays the address information when a value is entered in this field. Values are only available if the location is specified as a valid telework location in the Location Table.
(USF) **Geographic Location**	Displays the teleworker's geographic location code. This appears only for US Federal and Military installations.

Field or Control	***Description***
(USF) **View Location**	Select to access the Location Description page, based on the selected geographic location. This link only appears for US Federal and Military installations.

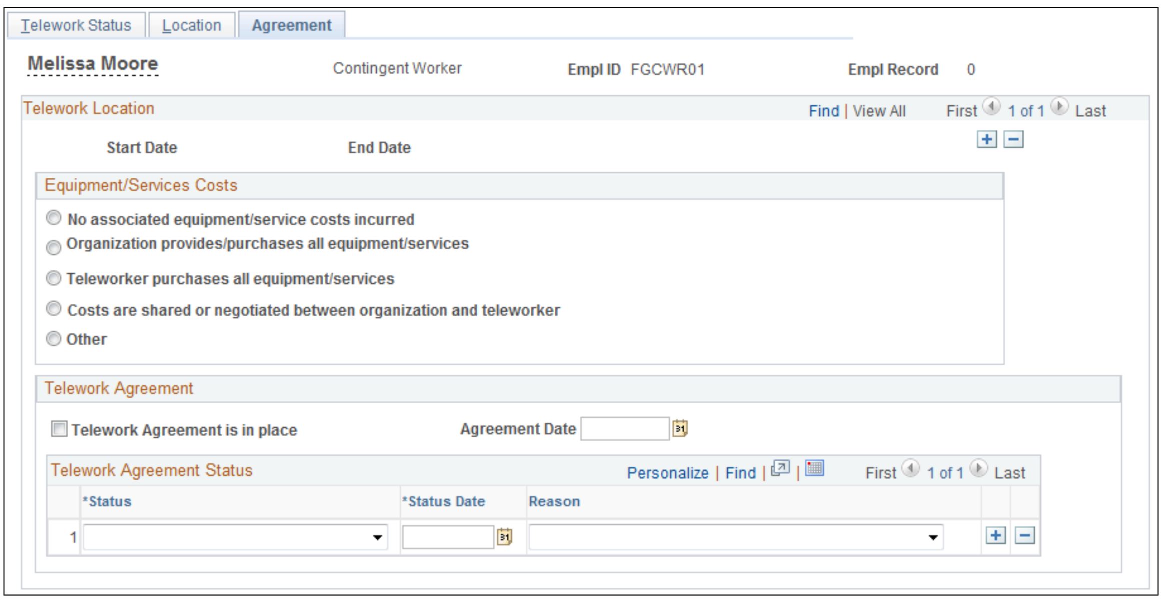
Maintain Teleworkers - Agreement Page

Use the Maintain Teleworkers - Agreement page (TELE_AGREEMENT) to note how telecommuting equipment and services costs are handled, and monitor and track status changes associated to a telework request.

Navigation:

Workforce Administration > **Job Information** > **Maintain Teleworkers** > **Agreement**

This example illustrates the fields and controls on the Maintain Teleworkers - Agreement page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Equipment/Services Costs	Select an option to denote how the telecommuting equipment and services costs will be handled. This section allows users to capture who the responsible party is based on the Telework agreement, or company policy. This should be agreed upon between the organization and the teleworker ahead of time, as part of the Telework Agreement.

Field or Control	*Description*
Telework Agreement Status	Organizations may want to monitor and track status changes associated to a telework request. There are four delivered statuses for this feature. The US Federal Government requires these values and reasons. Other customers can modify or use these values as their organizational policy deems fit. For the *Approved* status, a value in the **Reason** field is not required. For the *Denied* status, the values in the **Reason** field are: *Handles secure materials, Perform on-site activities, Performance or conduct issues,* or *Other*. For the *Terminated by Employee* status, the **Reason** values are: *Change in work assignments, Decreased performance or conduct issues,* and *Other*. For the **Terminated by Manager** status, the **Reason** values are: *Change in work assignments, Decreased performance or conduct issues,* and *Other*.

(Fluid) Managing Remote Worker Information

With an increased number of employees working outside the traditional office setting, your organization can record and track your remote workforce using PeopleSoft HCM. Employees can submit remote worker requests for themselves using the Remote Worker tile. In addition, HR administrators and managers have similar tiles to submit requests on behalf of an employee.

Administrators and managers can also use the Approvals framework to approve employee requests. Fluid Approvals supports the following *Remote Worker* approval transaction type for this feature. For information on using the common Pending Approvals and Approvals History pages, see also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

These videos provide an overview of the Fluid Remote Worker feature:

Video: Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker

Video: PeopleSoft Remote Worker

Video: Image Highlight, PeopleSoft HCM Update Image 48: Remote Worker Request Update Enhancement

This topic discusses managing remote worker information using the PeopleSoft Fluid User Interface.

Pages Used to Manage Remote Worker Information Using Fluid as an Administrator or Manager

Page Name	***Definition Name***	***Usage***
Remote Worker Tile (for Administrators)	HC_HR_RWORK_FL (This is the cref for this tile)	Enter and review remote worker requests for the workforce using fluid pages.
Remote Worker Request Page	HR_RW_LANDING_FL	View remote worker rows and initiate the process to create, delete, edit, or view a remote worker request row.
Add Remote Work Request (or Edit Request) Page	HR_RW_ADD_RQST_FL	Initiate a remote worker request.
The Activity Guide Composer Framework for the Remote Worker Request Component for Administrators and Managers (Common elements on pages used to enter remote worker requests using fluid)	N/A	The fluid Remote Worker Request pages appear within the context of an activity guide. The activity guide shows a list of remote worker request pages in the left panel and the page that corresponds to the current selected page step in the right panel. The activity guide also provides navigation buttons in the page sub-banner for navigating through the page steps and saves the data.
Remote Worker Request - Guidelines Page	AGC_INFO_FL	Review any policies or guidelines to work remote.
Remote Worker Request - Request Details Page	HR_RW_RQST_DTL_FL	Enter the specifics of the remote work request.
Remote Worker Request - Attachments Page	HR_RW_SS_ATTACH_FL	Add or view attachments and notes for a request.
Remote Worker Request - Review and Submit Page	HR_RW_REVIEW_FL	Review a summary of the request and submit it for approval.
Remote Worker Confirmation Page	HR_RW_SUB_CNF_FL	Confirm that your request has been submitted successfully.
Request Details Page (or Remote Worker Request Page)	HR_RW_REVIEW_FL EOAWMA_TXNHDTL_FL	View a complete summary of the remote work details for that start date.
Questionnaire Page	EOQF_QSTNR_PRVW_FL	View the employee's answers to the remote work questionnaire.

Page Name	***Definition Name***	***Usage***
Pending Approvals - Remote Worker Page	EOAWMA_TXNHDTL_FL	Administrators and managers review and take action on remote worker requests.
Attachments Page	HR_RW_ATTACH_SCF	Administrators and managers view attachments and notes linked to a request.

Note: This topic discusses the pages common to the administrator, manager, and employee remote worker request pages. For additional remote worker request pages specific to the employee, see “Managing Remote Worker Requests as an Employee using Fluid” (PeopleSoft eProfile).

Understanding the Remote Worker - Search Criteria Page for Administrators

Fluid Remote Worker for administrators uses the Configurable Search functionality, which gives organizations the ability to define how the search page will perform and the search field layout. Your organization has control over which fields should appear as criteria, as well as their field order, on the Fluid Remote Worker - Search Criteria page. This allows you to search for an employee using other means, such as location, department, HR status, job code, or business title.

For information on setting up search page configurations, see “Setting Up Search Configuration” (Application Fundamentals) documentation for more information.

This video provides an overview of the Configurable Search feature:

Video: Image Highlights, PeopleSoft HCM Update Image 36: Configurable Search

Delivered Remote Worker Search Record

The PeopleSoft Remote Worker feature delivers the fluid *Remote Worker Admin* search page. This search uses the standard search record *RW_EMP_SRCH_FL*. Using this search record, administrators can configure the page to use search criteria such as preferred name, pay group, full or part-time status, HR status, and more.

Important! The *Remote Worker Admin* content reference for fluid is delivered with an *Inactive* status on the Search Configuration Page. The configurable search must be set to *Active* for this content reference to use this search page.

These fields are specific to the Remote Worker search page.

Term	***Definition***
Job Eligible and **Position Eligible**	Displays if the person's job or position is eligible for remote work. See the **Available for Telework** option on the following pages: "Manage/Create Position - Position Data Page" (PeopleSoft Human Resources Manage Positions), "Position Data - Specific Information Page" (PeopleSoft Human Resources Manage Positions), and "Job Code Profile Page" (Application Fundamentals).

Remote Worker Tile (for Administrators)

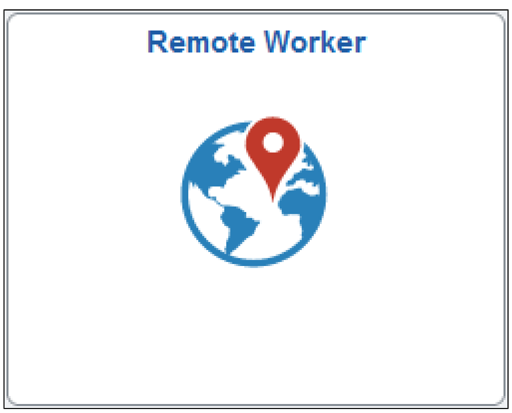
Administrators use the Remote Worker tile from the Administer Workforce home page to enter and review remote worker requests for the workforce using fluid pages.

Note: You must be assigned the *Fluid Remote Worker Admin* role to access this tile and pages.

Navigation:

The Remote Worker tile will display as part of the fluid "Workforce Administrator Homepage" (Application Fundamentals) when you have been granted the *Fluid Remote Worker Admin* role.

This example illustrates the Remote Worker tile for the administrator.



Click this tile to access the Remote Worker component and pages in Fluid. The system will first display the Remote Worker search page where you will search for and select a worker in your organization and initiate a remote worker request on his or her behalf.

Related Links

"Setting Up Search Configuration" (Application Fundamentals)
"Managing Remote Worker Requests as a Manager Using Fluid" (PeopleSoft eProfile Manager Desktop)
"Managing Remote Worker Requests as an Employee using Fluid" (PeopleSoft eProfile)

Remote Worker Request Page

Use the Remote Worker Request page (HR_RW_LANDING_FL) to view remote worker rows and initiate the process to create, delete, edit, or view a remote worker row (based on your user access).

Navigation:

- (Administrator role) Select the Remote Worker Tile (for Administrators) from the Workforce Administrator home page, enter search criteria, and select the **Continue** arrow (>) button for a worker row on the Remote Worker - Search Criteria page.

  See also "Configuring Person Search" (Application Fundamentals) and "(Fluid) Person Search Page" (Application Fundamentals) for setting up person searches for administrators.

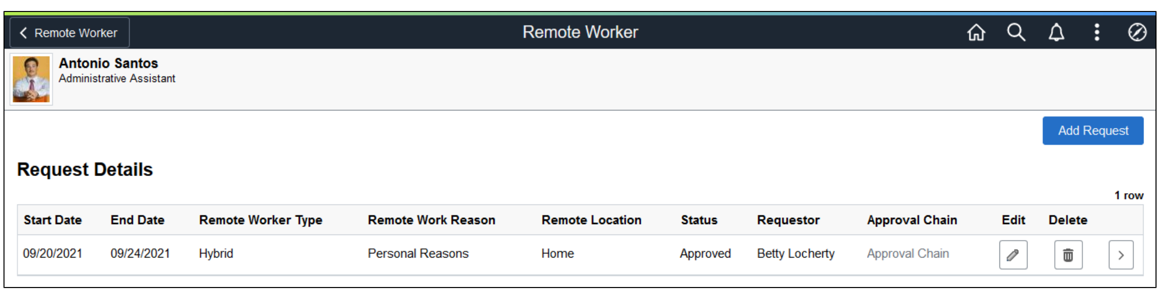
- (Manager role) Select the "Remote Worker Tile (for Managers)" (PeopleSoft eProfile Manager Desktop) tile from the Manager Self Service home page, enter search criteria, and select the **Continue** arrow (>) button for one of your direct report rows on the Remote Worker Request - Find Team Member page.

  See also "Configuring Direct Reports Functionality" (Application Fundamentals) and "(Fluid) <Transaction Name> - Find Team Member Page" (Application Fundamentals) for setting up the direct reports.

- (Employee role) Select the "Remote Worker Tile (for Employees)" (PeopleSoft eProfile) from the Employee Self Service home page.

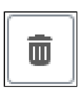
Note: When only one person matches the search criteria, the system will automatically direct you to this page.

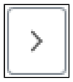
This example illustrates the fields and controls on the Remote Worker Request page for the employee.



This page shows a quick summary of an employee's remote work requests, if any.

Field or Control	***Description***
Add Request button	Select this button to enter a new remote worker request. **Note:** If an in progress row exists (e.g.- *Draft* or *Pending Approval*), you cannot add a new row. You can however correct another row. Best practice is to add a new transaction row and complete the approval process for that request first before adding another row.

Field or Control	***Description***
Start Date and **End Date**	For existing requests, the page displays the start date. The end date is not required and may display the field as blank. When adding a new request that overlaps with the end date of the existing request, or the existing request does not have an end date, the system will insert an end date as the day before the start date of the new request. You do not need to access the existing request to change or add the end date in this scenario.
Status	Displays the status of the remote worker row. **Note:** You can only have one in progress row at a time.
Approval Chain	This link is available when you have approval workflow set up and the request has been sent for approval. Select this link to view the approval status and approver details of a proposed request.
 (Edit) button	(Administrator role) Select to access the row and make corrections to the remote worker request. When you select an existing row to make updates, the system will open the Add Remote Work Request (or Edit Request) Page. This enables you to update the start date, end date, or remote worker type of the existing row. Click **Next** to move to the Remote Worker activity guide pages. **Note:** Administrators can edit current and future requests, but edits are not allowed on past dated requests.
 (Delete) button	Select to remove the remote worker row. When a remote worker row is deleted, the payroll administrator will receive a notification that the request has been deleted. This button is available for the specified roles when a request has the following status: • *Draft* status: the Delete button is available for the person who originated the request and the administrator. • *Pending Approval* status: the Delete button is not available for any of the roles. However, those in the approval chain can access the approval request and approve, deny, or push back the request. • *Approved*: the Delete button is available for the manager and the administrator.

Field or Control	***Description***
 (Edit/View) button	If the request is approved, select this button to open the Request Details Page and view the remote work details. **Note:** Administrators and managers can edit current and future requests, but edits are not allowed on past dated requests. If you are the requestor and the row is in *Draft* status, select this button to access the Remote Worker Request activity guide pages and make updates.

Add Remote Work Request (or Edit Request) Page

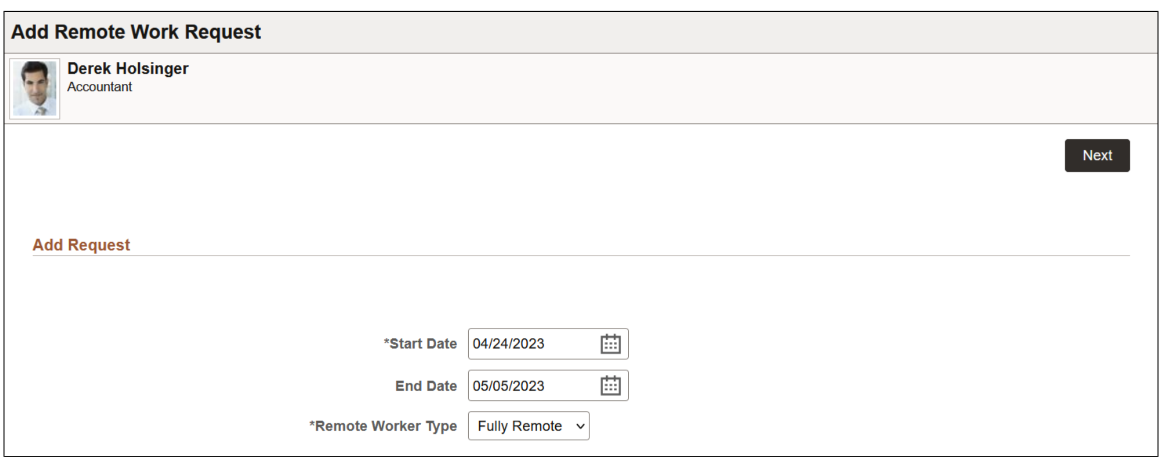
Use the Add Remote Work Request (or Edit Request) page (HR_RW_ADD_RQST_FL) to initiate a remote worker request.

Navigation:

- Select the **Add Request** button from the Remote Worker Request Page.
- Select the **Edit** button from the administrator Remote Worker Request Page.

Note: Administrators and managers can edit current and future requests, but edits are not allowed on past dated requests.

This example illustrates the fields and controls on the Add Remote Work Request page.



Field or Control	***Description***
Start Date	Enter the date this person will begin working remote. This date will be display only within the Remote Worker Request pages and can only be updated from this page. When adding a new request that overlaps with the end date of an existing current or future request, or the existing current or future request does not have an end date, the system will insert an end date as the day before the start date of the new request. • *When the new request overlaps with the previous row:* The system displays an overlapping warning message. Select **OK** to have the system update the end date of the previous request. • *When the previous row has a blank end date:* The system will not display a warning message. Instead you will be allowed to proceed and the system will automatically enter the end date for the previous request. **Note:** You can enter new requests that overlap with current or future rows only. You cannot insert new requests that overlap with past (historical) rows.
End Date	Enter the date this person will be ending their remote work. If you do not know the date, you can leave this field blank. **Note:** You do not need to access the existing request to add the end date when adding a new request if the dates overlap or the existing request does not have an end date. The system will automatically insert the day before the start date of the new request as the end date of the existing request. The new end date will be updated upon approval of the new request. If approvals are not required, it will be updated when you save the new request.
Remote Worker Type	Select one of the following translate values: • *Fully Remote*: Employee will be 100 percent remote. • *Hybrid*: Employee will work part-time remote and part-time in the office. This value can be changed from within the Remote Worker Request pages.
Next button	Select this button to access the Remote Worker Request activity guide and enter details for the request.

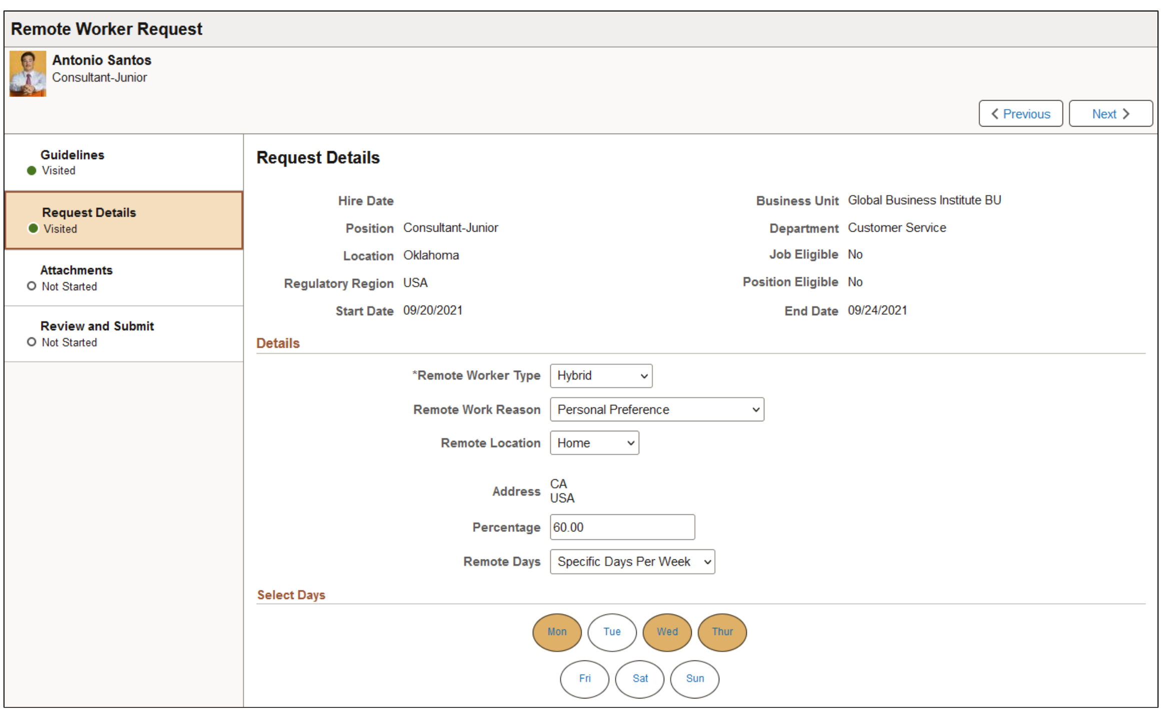
The Activity Guide Composer Framework for the Remote Worker Request Component for Administrators and Managers

In fluid, the Remote Worker Request component pages appear within the context of the Activity Guide Composer. The PeopleSoft HCM application delivers the *RWADMIN* Remote Worker Request templates for the *Fluid Remote Worker Admin* and *Fluid Remote Worker Manager* pages and contains these steps from the *HR_RWORK* Remote Worker Category:

Page	***HR_RWORK Category Step***
Guidelines	*INSTRUCTIONS*
Request Details	*REQUEST_DTL*
Attachments	*ATTACH*
Review and Submit	*REVIEW*

To understand or set up templates using the Activity Guide Composer, see the “Understanding the Activity Guide Composer” (Enterprise Components) documentation.

(Manager and Administrator view) This example illustrates the layout for the Remote Worker Request pages for a manager.



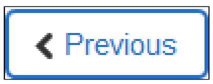
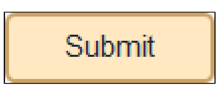
The activity guide shows a list of remote worker request pages (steps) in the left panel and the page that corresponds to the current selected page, or step, in the right panel. The activity guide also provides navigation buttons for navigating through and saving the page steps.

Note: Throughout this topic, the page illustrations show sections of the remote worker process without the context of the left panel activity guide step list. Even though the framework is not illustrated, remember that all steps appear within that framework.

For additional remote worker request pages specific to the employee, see “Pages Used to Enter Remote Worker Requests as an Employee Using Fluid” (PeopleSoft eProfile).

Remote Worker Request Page Header (Sub-Banner)

A gray area under the main page banner displays the component title *Remote Worker Request* and contextual information that is specific to the remote worker request, including the person's name and job title, as well as actions buttons.

Field or Control	***Description***
 Previous button	Click this button to navigate to the previous page. Navigating to another page saves the data you entered on that page. The button is not visible on the first step in the request.
 Next button	Click this button to navigate to the next page. Navigating to another page saves the data you entered on that page. The Review and Submit page does not display the **Next** button, it displays a **Submit** button instead.
 Submit button	This button appears on the Remote Worker Request - Review and Submit Page only. **Note:** Your request will remain in *Draft* status until you click the **Submit** button. When approvals are required for updating or creating requests, it will be sent to the approving managers or administrators, where they will use the Pending Approvals - Remote Worker Page to take action on a request. This video provides an overview of Fluid Approvals: Video: PeopleSoft HCM Fluid Approvals

Left Panel Navigation

The page framework includes a left panel that lists the page tabs in the remote worker request process. Each step displays a status, which is either *Not Started* or *Visited*. Required steps will show as *In Progress* until you complete the step or move away from the page. When you complete a required step and move on, the status changes to *Complete*. Users can navigate to steps by clicking the page tab or using the navigation buttons in the header (sub-banner). In the Remote Worker Request activity guide, selecting or moving to another page triggers a save process for the page you are leaving. The process will remain in draft status until you submit the request.

Pages

The main, right panel displays the page for the current step in the transaction.

Note: For the discussion of the transaction page topics that follow, the page illustrations show the individual Remote Worker Request pages without the context of the activity guide step list, although the system will display the left panel step navigation.

Field or Control	*Description*
<Title Text>	Displays a page title that includes the step name and corresponds to the tab in the left navigation.

Related Links

"Understanding the Activity Guide Composer" (Enterprise Components)

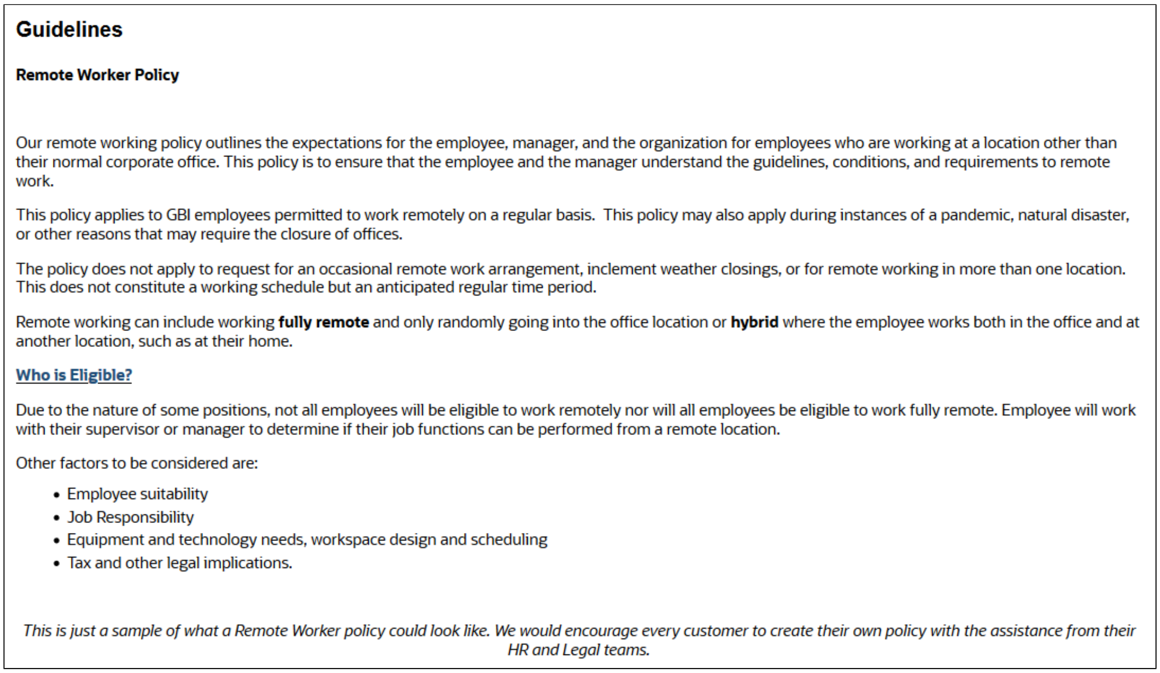
Remote Worker Request - Guidelines Page

Use the Remote Worker Request - Guidelines page (AGC_INFO_FL) to review any policies or guidelines to work remote.

Navigation:

- Select the **Next** button from the Add Remote Work Request (or Edit Request) Page.
- Select to edit a *Draft* row you have created.

This example illustrates the fields and controls on the Remote Worker Request - Guidelines page.



Guidelines

Remote Worker Policy

Our remote working policy outlines the expectations for the employee, manager, and the organization for employees who are working at a location other than their normal corporate office. This policy is to ensure that the employee and the manager understand the guidelines, conditions, and requirements to remote work.

This policy applies to GBI employees permitted to work remotely on a regular basis. This policy may also apply during instances of a pandemic, natural disaster, or other reasons that may require the closure of offices.

The policy does not apply to request for an occasional remote work arrangement, inclement weather closings, or for remote working in more than one location. This does not constitute a working schedule but an anticipated regular time period.

Remote working can include working **fully remote** and only randomly going into the office location or **hybrid** where the employee works both in the office and at another location, such as at their home.

Who is Eligible?

Due to the nature of some positions, not all employees will be eligible to work remotely nor will all employees be eligible to work fully remote. Employee will work with their supervisor or manager to determine if their job functions can be performed from a remote location.

Other factors to be considered are:

- Employee suitability
- Job Responsibility
- Equipment and technology needs, workspace design and scheduling
- Tax and other legal implications.

This is just a sample of what a Remote Worker policy could look like. We would encourage every customer to create their own policy with the assistance from their HR and Legal teams.

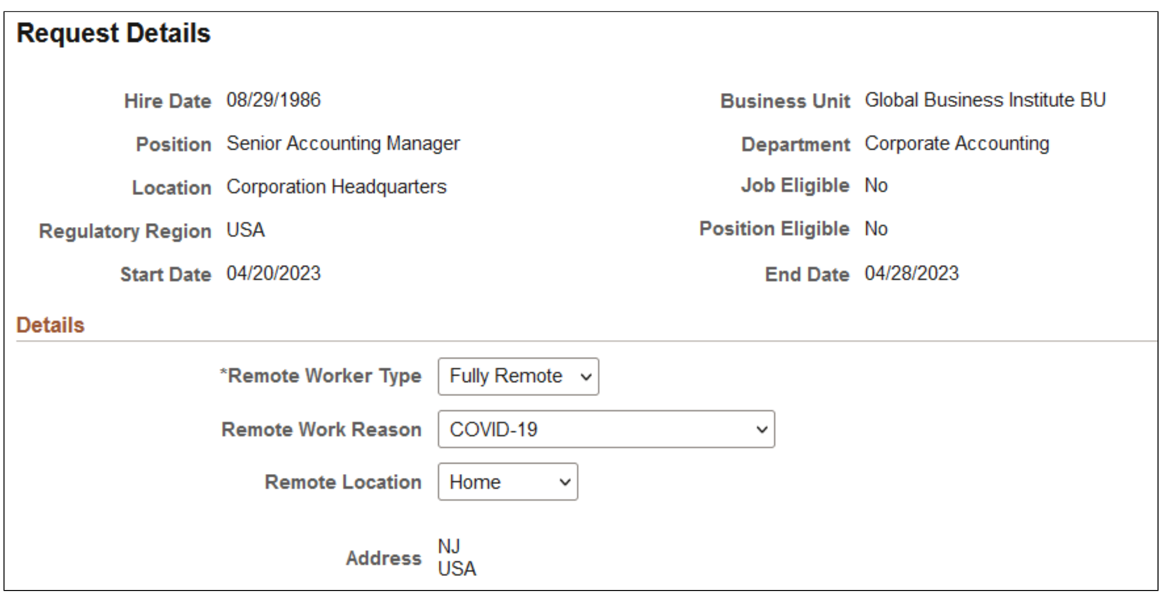
Remote Worker Request - Request Details Page

Use the Remote Worker Request - Request Details page (HR_RW_RQST_DTL_FL) to enter the specifics of the remote work request.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Request Details** tab from the left panel navigation steps.

(Fully Remote) This example illustrates the fields and controls on the Remote Worker Request - Request Details page showing someone that is fully remote.



Request Details

Hire Date	08/29/1986	Business Unit	Global Business Institute BU
Position	Senior Accounting Manager	Department	Corporate Accounting
Location	Corporation Headquarters	Job Eligible	No
Regulatory Region	USA	Position Eligible	No
Start Date	04/20/2023	End Date	04/28/2023

Details

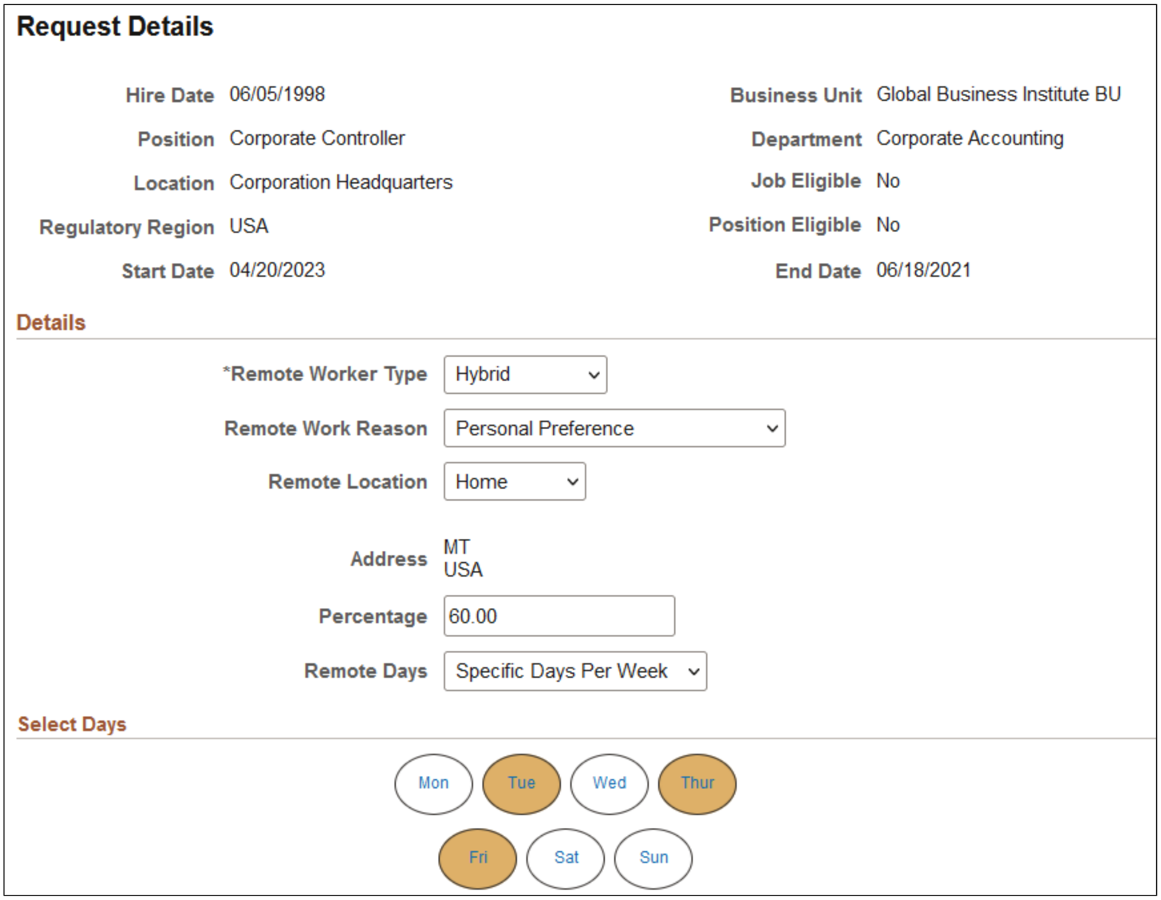
*Remote Worker Type: Fully Remote

Remote Work Reason: COVID-19

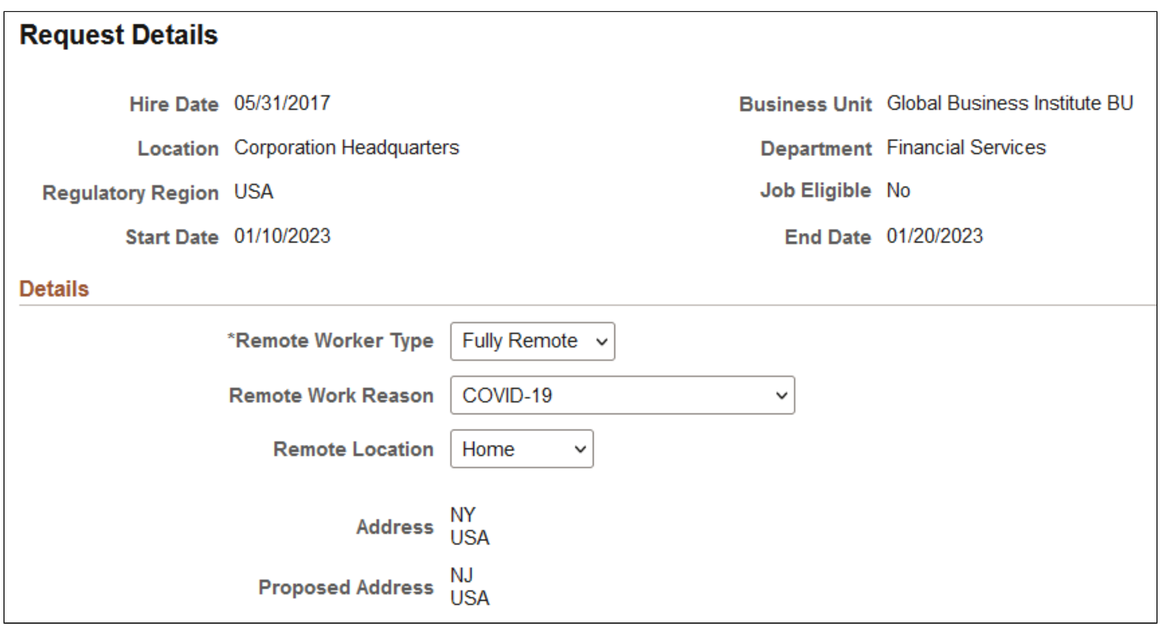
Remote Location: Home

Address: NJ
USA

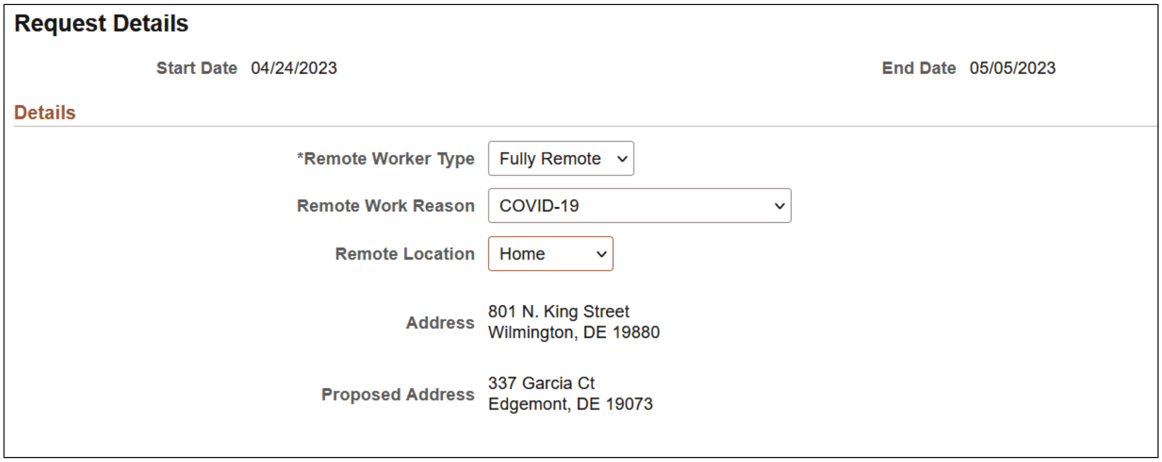
(Hybrid) This example illustrates the fields and controls on the Remote Worker Request - Request Details page showing someone that will be working a hybrid remote schedule by days of the week.



(Pending address change: Administrator or Manager view) This example illustrates the Remote Worker Request - Request Details page when an employee has an address change pending.



(Pending address change: Employee View)This example illustrates the Remote Worker Request - Request Details page when an employee has an address change pending.



Details

Field or Control	*Description*
Remote Worker Type	Select one of the following translate values: • *Fully Remote*: Employee will be 100 percent remote. • *Hybrid*: Employee will work part-time remote and part-time in the office.
Remote Work Reason	Select the reason for requesting to work remotely. Valid values are defined on the Remote Worker Configuration Page.
Remote Location	Select the location type from which the person will be working remote. Valid values include: • *Home*: Displays the person's home address stored in Personal Data in the **Address** field. • *Other*: Displays the Add Address button where you can manually add an address. • *Workplace*: Displays the Location Name field, where you can enter a company location.
Location Name	This field appears when you select *Workplace* for the **Remote Location** field. Enter a company location name.

Field or Control	***Description***
Add Address button	This field appears when you select *Other* for the **Remote Location** field. Click this button to access the Address page and enter the address details.
Address	Displays the current home address where the person will be working remotely. **Note:** While the full address appears for the employee, the manager and administrator will only see the state for the employee's home address.
Proposed Address	This field appears when an employee has submitted a home address change that is pending. Displays the new home address from which the employee will be working remotely. **Note:** While the full address appears for the employee, the manager and administrator will only see the state of the employee's home address. **Note:** Managers will use the “Pending Approvals - <Transaction Name> Page” (PeopleSoft eProfile Manager Desktop) for *Address Change* to approve the address. Approving a remote work request when an address change is pending will not approve the address.
Percentage	This field appears when you select *Hybrid* for the **Remote Worker Type** field. Enter the percentage of time this person will be working remotely. This number will be used in the Remote Worker analytics but does not validate against the days a person selects for remote working days. See also Remote Worker Insights Dashboard (for Administrators).

Field or Control	***Description***
Remote Days	This field appears when you select *Hybrid* for the **Remote Worker Type** field. Chose from the following valid values: • *Average Days Per Month* • *Average Days Per Week* • *Specific Days Per Week*
Average Days/Month (average days per month)	This field appears when you select *Average Days Per Month* for the **Remote Days** field. Enter the estimated number of days this person will be working remote over a month's time.
Average Days/Week (average days per week)	This field appears when you select *Average Days Per Week* for the **Remote Days** field. Enter the estimated number of days this person will be working remote over a week's time.

Select Days

This section is available when you have indicated a *Hybrid* schedule and selected the *Specific Days Per Week* option for the **Remote Days** field.

Select the days that you will be working remote.

Remote Worker Request - Attachments Page

Use the Remote Worker Request - Attachments page (HR_RW_SS_ATTACH_FL) to add or view attachments and notes for a request.

Navigation:

After accessing the Remote Worker Request component, click the **Next** or **Previous** button or select the **Attachments** tab from the left panel navigation steps.

This example illustrates the fields and controls on the Remote Worker Request - Attachments page.

This page uses the Attachments and Notes frameworks to manage attachments and notes by uploading, deleting, or updating attachments using fluid.

When a user submits a request for approval, all attachments on this page will be sent with the request.

Field or Control	***Description***
Add Attachment button	Click this button to access the File Attachment page and upload files.
Add Note button	Click this button to access the Note page and enter additional comments.
Document Name and **Description**	Select the link to download and view the attachment. Enter a description, or the field will use the attachment file name as the description upon saving (moving away from) the page.
Document Details > button	Select this button to access the Attachment or Note pages. From that page you can view details, update information, or delete the attachment or note row.

Related Links

"Configuring Attachments in Fluid Framework" (Application Fundamentals)

"Configuring Attachments" (Application Fundamentals)

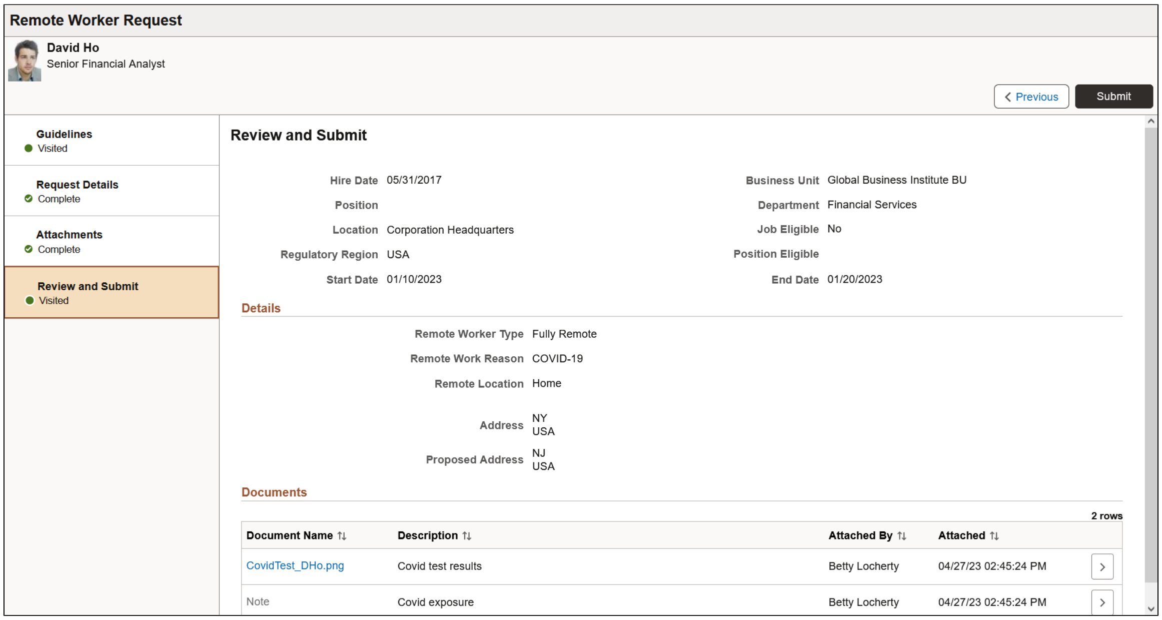
Remote Worker Request - Review and Submit Page

Use the Remote Worker Request - Review and Submit page (HR_RW_REVIEW_FL) to review a summary of the request and submit for approval.

Navigation

After accessing the Remote Worker Request component, click the **Next** button or select the **Review and Submit** tab from the left panel navigation steps.

This example illustrates the fields and controls on the Remote Worker Request - Review and Submit page.



Note: This request will be saved in *Draft* status until you click the **Submit** button.

Field or Control	***Description***
Submit button	The **Submit** button appears on this page only. Click this button to save and submit your request. • If approvals are required, the request will be sent to the approving managers or administrators, where they will use the Pending Approvals - Remote Worker Page to take action on a request. Also, the payroll administrator will get a notification of this request when it is approved if he or she was not part of the approval chain. • If approvals are not required, the information will automatically be saved to the system. The payroll administrator will get a notification of this request when the request is submitted. Approvals can enabled for both employee and manager requests on the Remote Worker Configuration Page. After a request has been submitted, the system will display the Remote Worker Confirmation Page for you to review the status of the submit.

This video provides an overview of Fluid Approvals:

Video: PeopleSoft HCM Fluid Approvals

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Related Links

“Understanding the Approval Framework Feature” (Approval Framework)

“Understanding Approvals” (Application Fundamentals)

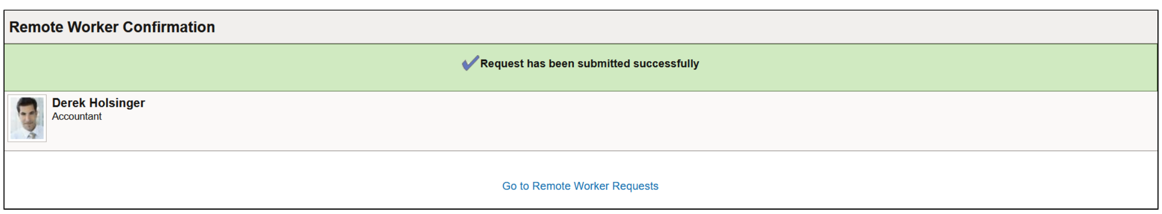
Remote Worker Confirmation Page

Use the Remote Worker Confirmation page (HR_RW_SUB_CNF_FL) to confirm that your request has been submitted successfully.

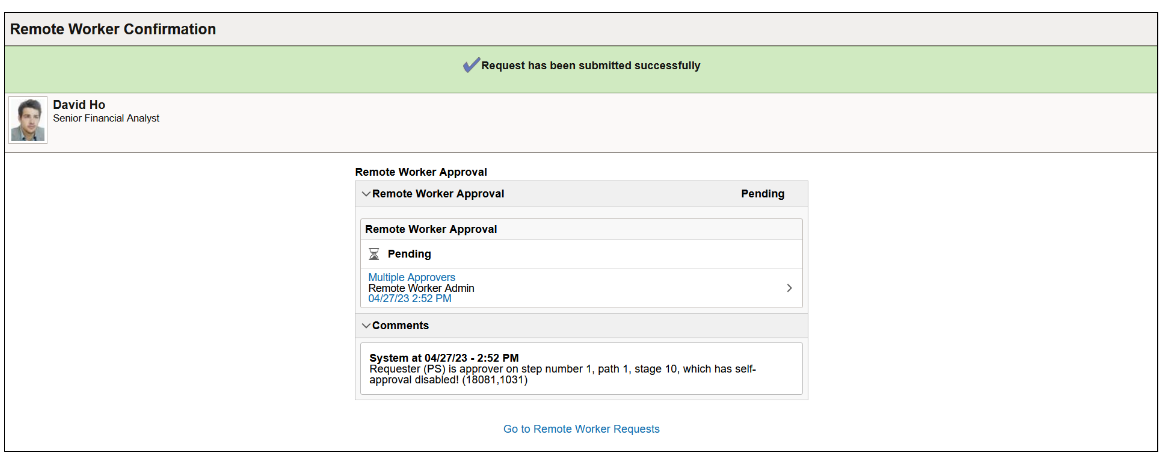
Navigation:

Click the **Submit** button on the Remote Worker Request - Review and Submit Page.

This example illustrates the fields and controls on the Remote Worker page when approvals are turned off.



This example illustrates the fields and controls on the Remote Worker Confirmation page when approvals are required.



When approvals are configured and enabled on the Remote Worker Configuration Page for either the manager or employee, the message at the top of the page will indicate that it was submit and the **Remote**

Worker Approvals group box will show the approval status and approval chain of the request. When approvals are not enabled, the page will not show the **Remote Worker Approvals** group box.

Note: The system routes approvals to the primary job supervisor.

Field or Control	***Description***
Go to Remote Worker Requests button	Click this button to return to the Remote Worker Request Page and view the status of the request.

Approving managers will use the Pending Approvals - Remote Worker Page to review and respond to transaction request.

Request Details Page

Use the Request Details page (HR_RW_REVIEW_FL) to view a complete summary of the remote work details for that start date.

Navigation:

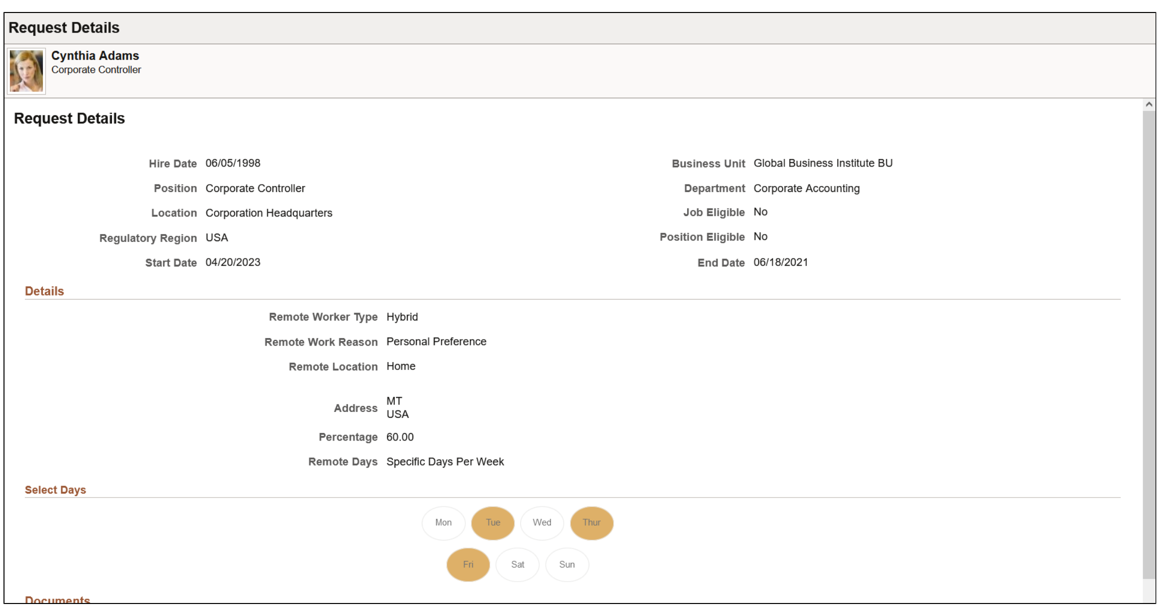
- Select the Edit/View Details > button from the Remote Worker Request Page.

  Note: When you select this option, the sub-banner and page heading will appear as **Request Details**.

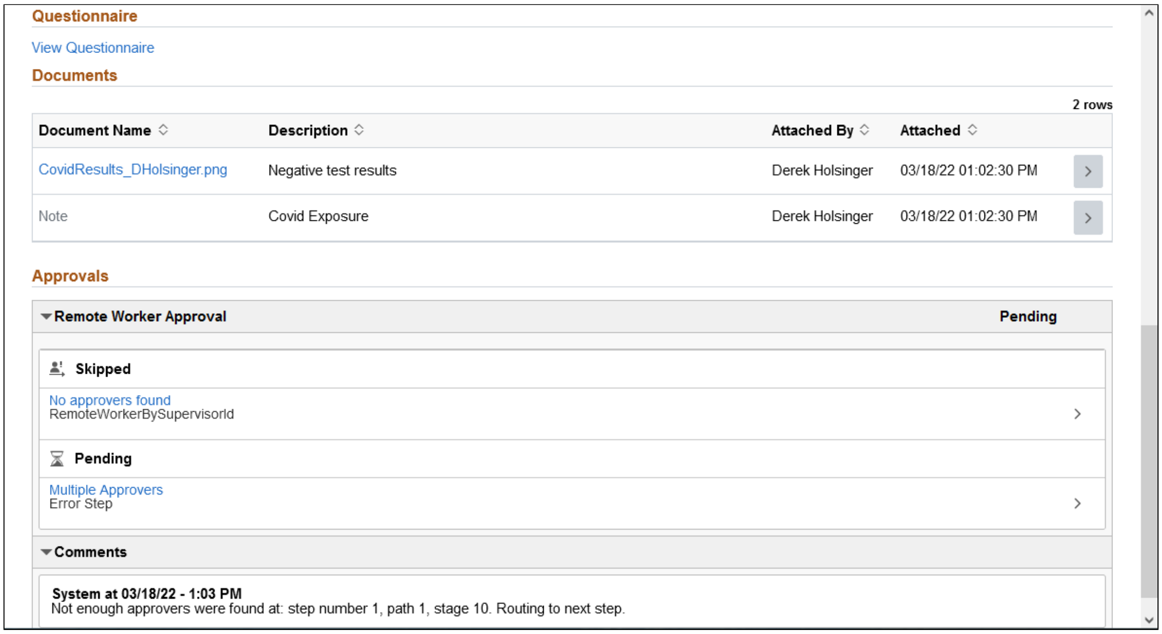
- Select the **View Remote Worker Request** link from the Pending Approvals - Remote Worker Page.

  Note: When you select the link from this page, the banner title will appear as **Remote Worker** and the page will display **Request Details**.

This example illustrates the Request Details page (1 of 2).



This example illustrates the Request Details page (2 of 2).



Fields and data found in this page map to those fields located on the various Remote Worker Request pages, as listed is this documentation.

Field or Control	***Description***
View Questionnaire link	Select this link to access the Questionnaire Page and view the employee's answers to the remote work questionnaire.

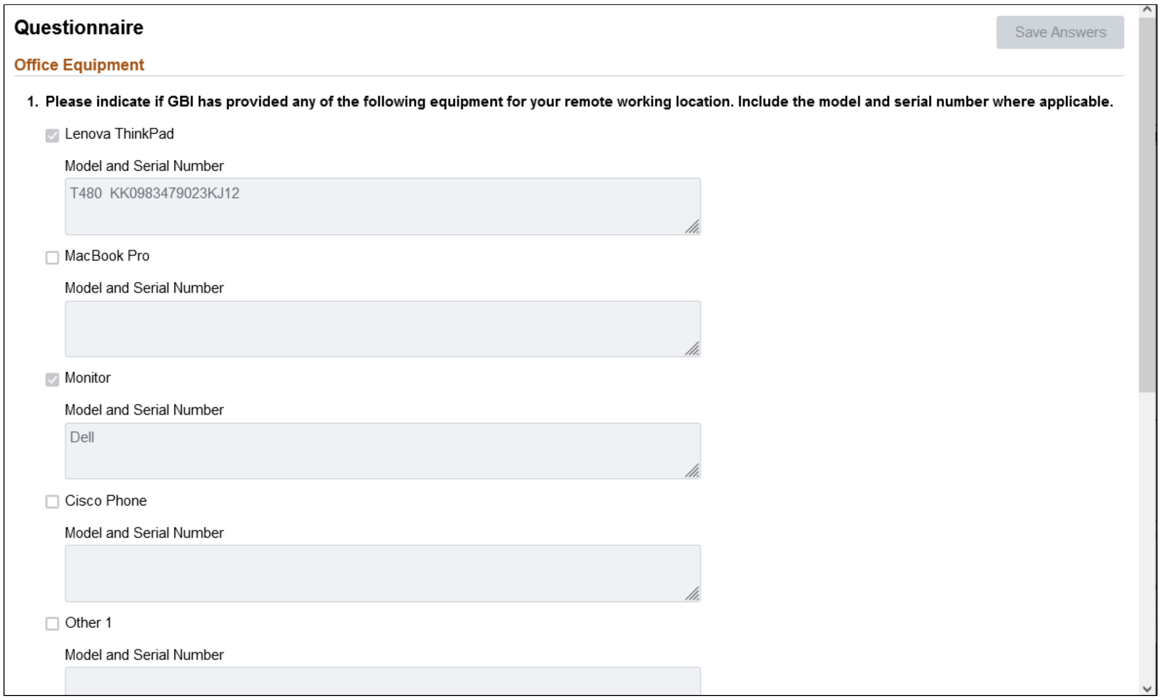
Questionnaire Page

Use the Questionnaire page (EOQF_QSTNR_PRVW_FL) to view the employee's answers to the remote work questionnaire.

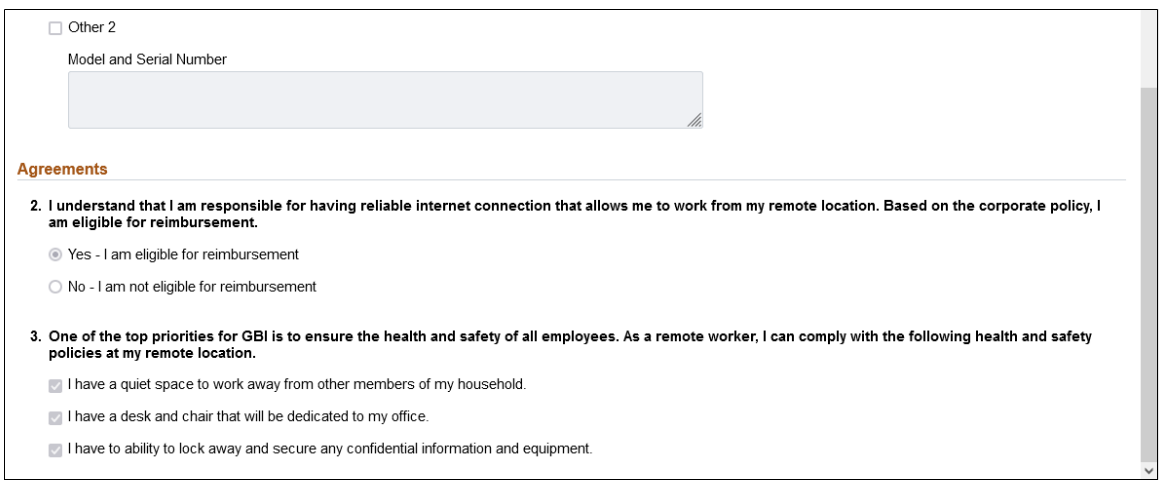
Navigation:

Select the **View Questionnaire** link from the Request Details Page.

This example illustrates the Questionnaire page (1 of 2).



This example illustrates the Questionnaire page (2 of 2).



Pending Approvals - Remote Worker Page

Managers and administrators use the Pending Approvals - Remote Worker page (EOAWMA_TXNHDTL_FL) to review and take action on remote worker requests.

Note: You must be assigned the *Fluid Remote Worker Admin* or *Fluid Remote Worker Manager* role to access this transaction.

Navigation:

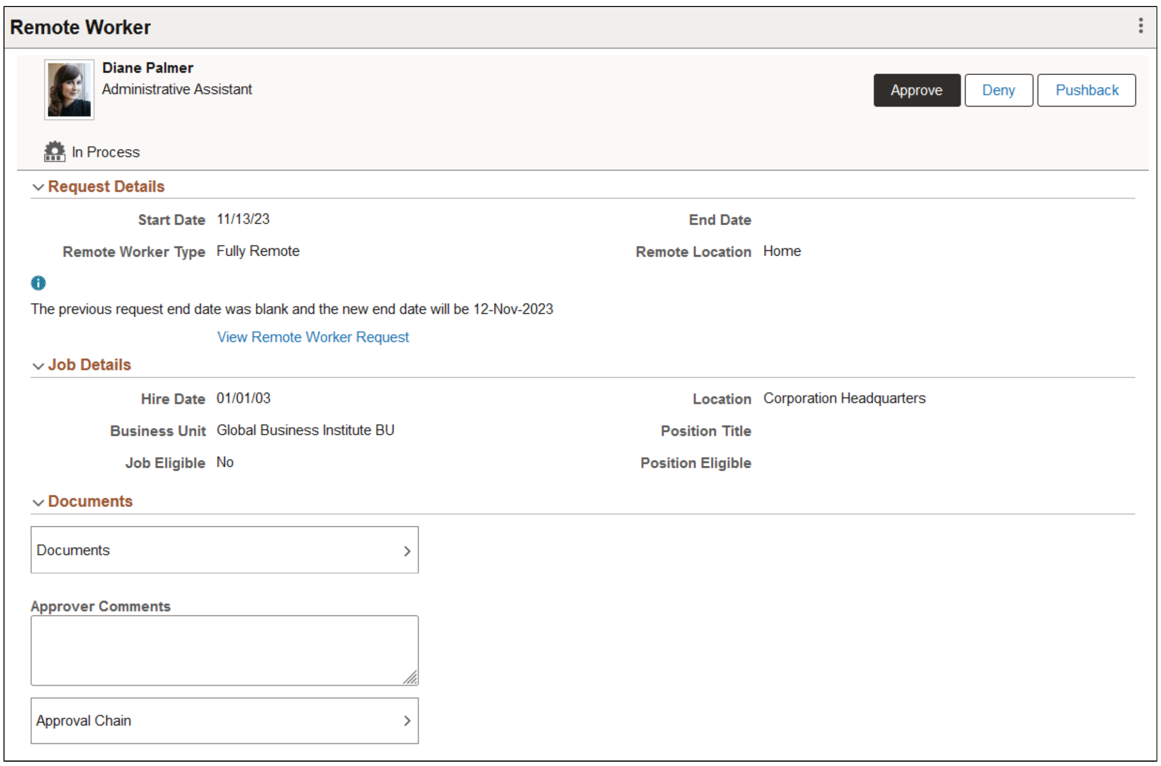
- Select the Approvals tile on the Manager Self Service home page to access the Pending Approvals page. Then click a *Remote Worker* transaction row on the Pending Approvals page.

Note: This transaction is listed under the *Remote Worker* view by type.

- Select the Notifications button in the banner, or from the Notifications panel select the appropriate approval notification.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

This example illustrates the fields and controls on the Pending Approvals - Remote Worker page.



Important! If an employee entered a home address change while creating a remote work request, the address change will need to be approved via the Pending Approvals - Address Change page.

Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (Application Fundamentals).

Field or Control	***Description***
Approve , **Deny**, and **Pushback**	Use these buttons to take action on the requested approval. The following happens when you selected one of these approval options: • *Approve*: When those in the approval chain have approved the request, the status will be changed to *Approved* on the Remote Worker Request Page. The payroll administrator will be notified when the request has been approved if he or she was not part of the approval chain. • *Deny*: The request will be terminated and the status on the Remote Worker Request will be changed to *Denied*. A new request will need to be created to submit a remote work request. • *Pushback*: The request will be sent back to the submitter and the status on will be changed to *Pushed Back*. The requestor can make changes to the row and resubmit the request for approval.

Request Details Section

Use this section to view summary information identifying the fields that were updated in the transaction that you are being asked to approve.

When a previous request exists that contains no end date, or it has an end date that is after the new request start date, the system will update the previous request with an end date one day prior to the new request start date. When this happens, the Pending Approvals - Remote Worker page will display informational text informing you of the change to the end date.

Field or Control	***Description***
View Remote Worker Request link	Click this link to access the Remote Worker page (see Request Details Page), where you can review details about the person’s request on one page. **Note:** The approver must have access to the Request Details page, with permission list *HCCPHR3374*, to review this information.

Job Details Section

This section displays the employee's job data and whether this person's job or position is approved for remote work.

Documents Section

Field or Control	***Description***
Documents	Click this item to open the Attachments Page where you can review the attachments or notes associated with this request.
Approver Comments	Enter any comments related to the approval action.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

This video provides an overview of Fluid Approvals:

Video: PeopleSoft HCM Fluid Approvals

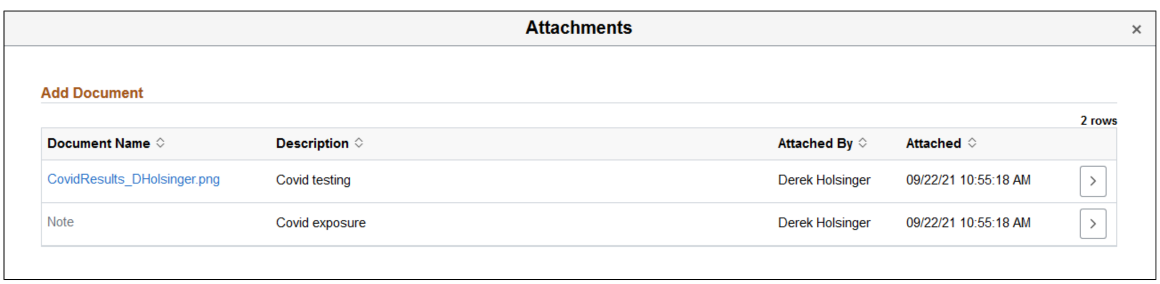
Attachments Page

Use the Attachments page (HR_RW_ATTACH_SCF) to view attachments and notes linked to a request.

Navigation:

Click the **Documents** row on the Pending Approvals - Remote Worker page.

This example illustrates the Attachments page.



Click the Document Name link to download and view an attachment using fluid.

Click a row chevron > button to view the details of the document or note.

The following video provides an overview and demonstration of the Fluid Attachment framework:

Video: PeopleSoft Fluid HCM Attachments

Tracking Disabilities

To set up tracking disabilities, use the Accommodation Type (ACCOM_TYPE_TABLE) component.

You can track any disabilities that your workers may have, as well as check your own facilities' accessibility. Administer Workforce includes a number of reports that list disability information.

These topics discuss tracking disabilities.

Pages Used to Track Disabilities

Page Name	***Definition Name***	***Usage***
Accommodation Types Page	ACCOM_TYPE_TABLE	Define the types of workplace accommodations that your organization makes for disabled workers.
Disability Page	DISABILITY	Enter disability information. Indicate if a worker is disabled and record details of the disability.
Disability History Page	DISABILITY_USA_SEC	View disability information previously entered for the employee.
Accomm Request Page	ACCOMM_REQUEST	Enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.
Accomm Option Page	ACCOMM_OPTION	Enter the options that the organization or the person with a disability is considering to resolve each accommodation request.
Accomm Job Task Page	ACCOMM_JOB_TASK	Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
Disability BRA Page	DISABILITY_BRA	Enter disability details.
Disability Category Setup DEU Page	DSB_EMP_CAT_SETUP	Set up disability categories.
Heavily Disabled DEU Page	RUNCTL_PER039GR	Run the Heavily Disabled report (PER039GR). This report lists heavily disabled workers and additional information about their disabilities.
Disability Report ITA Page	RUNCTL_PER060	Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports.

Disability Page

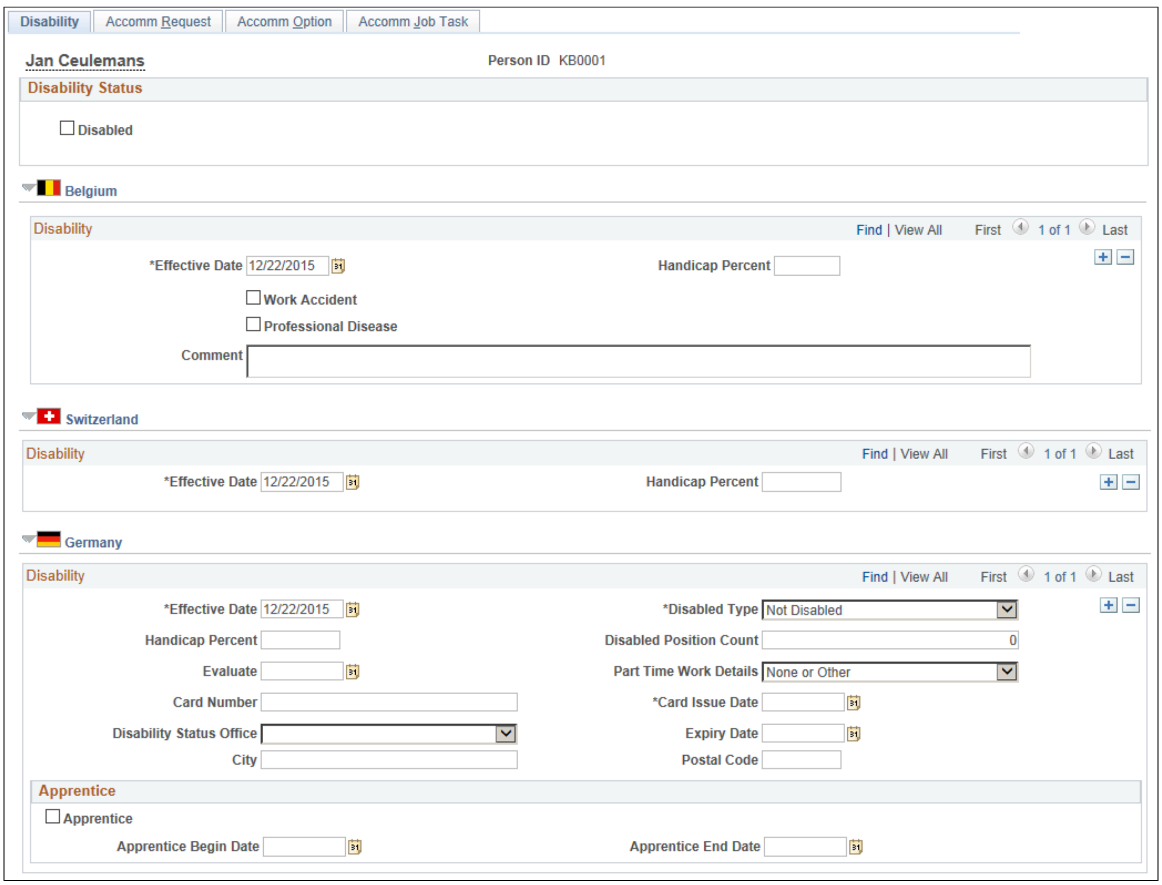
Use the Disability page (DISABILITY) to enter disability information. Indicate if a worker is disabled and record details of the disability.

Navigation:

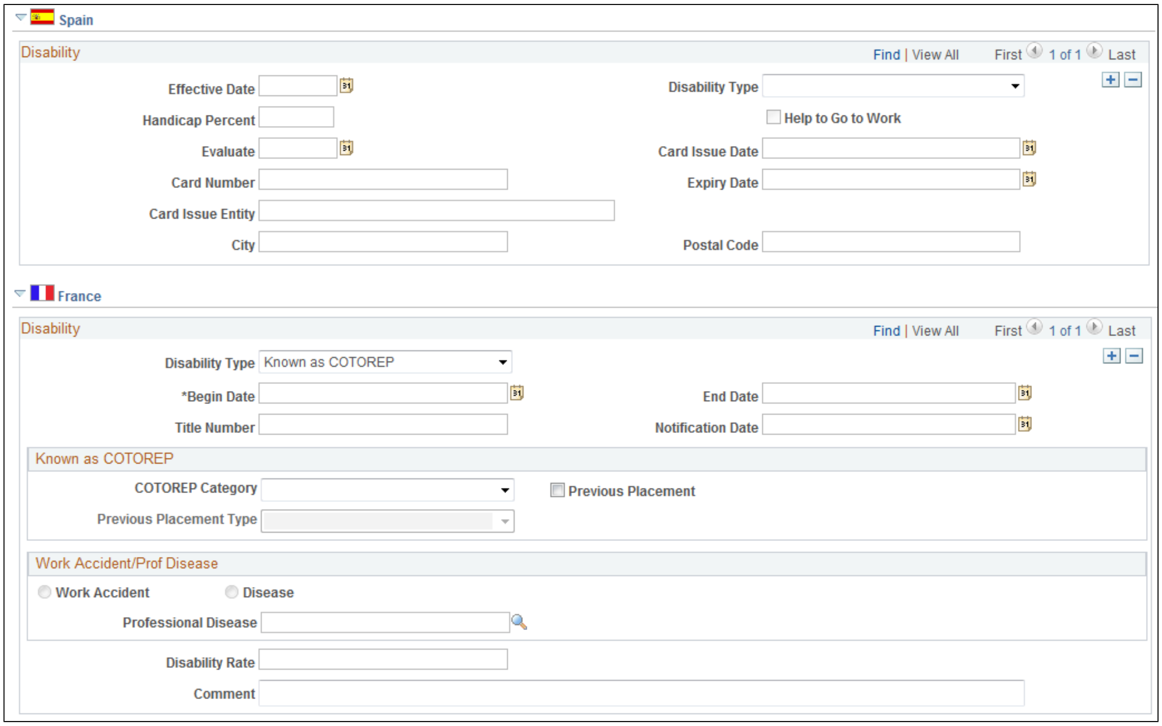
- **Workforce Administration** > **Personal Information** > **Disability** > **Disabilities** > **Disability**
- **Workforce Administration** > **Personal Information** > **Disability** > **Disabilities BRA** > **Disability**

Employees will use the self service pages to update their personal data. For more information on employee self service pages, see "Disability - Voluntary Self-Identification of Disability Page" (PeopleSoft eProfile) for fluid self service page or "(Classic) Reviewing and Updating Personal Information" (PeopleSoft eProfile) for the classic self service page.

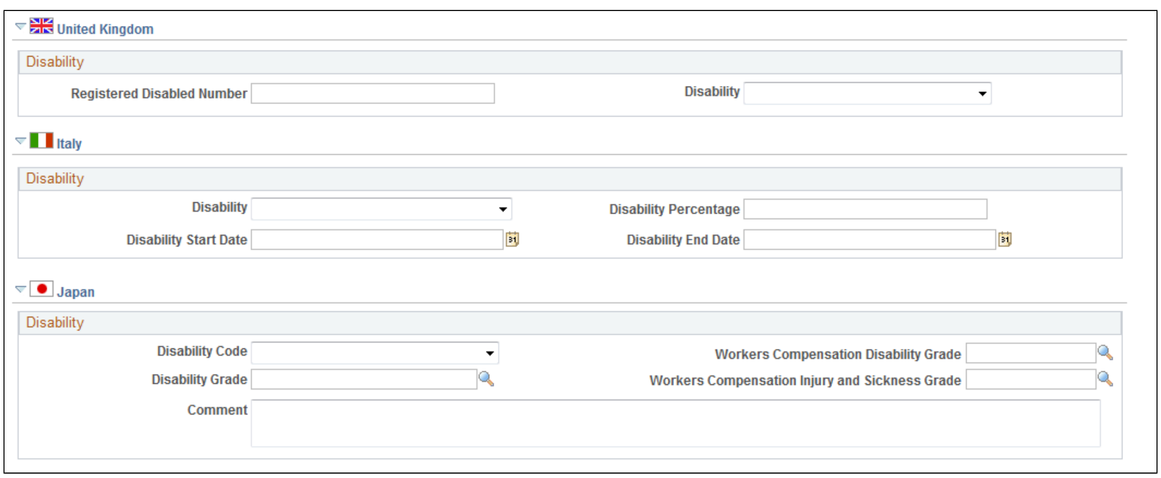
This example illustrates the fields and controls on the Disability page (1 of 4). You can find definitions for the fields and controls later on this page.



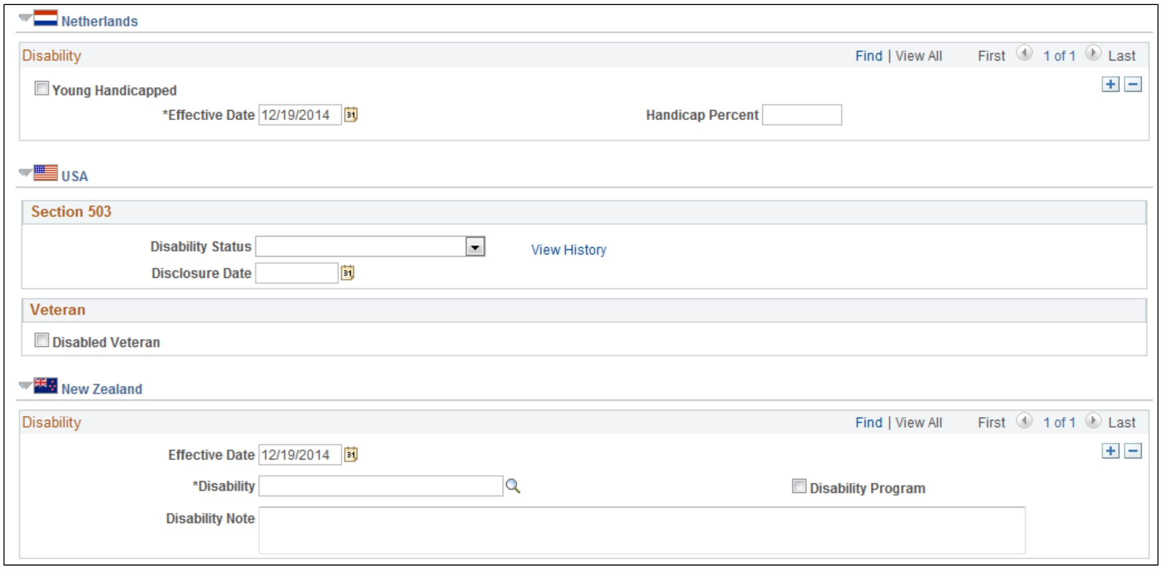
This example illustrates the fields and controls on the Disability page (2 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Disability page (3 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Disability page (4 of 4). You can find definitions for the fields and controls later on this page.



Track information regarding worker disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

Field or Control	***Description***
Disabled	Select if the worker is disabled.

(BEL) Belgium

Field or Control	***Description***
Handicap Percent	Enter a percentage of disability from *0* to *100.*
Work Accident	Select if the disability is the result of a work accident.
Professional Disease	Select if the disability is the result of a disease.

(CHE) Switzerland

Field or Control	***Description***
Handicap Percent	Enter a percentage of disability from *0* to *100.*

(DEU) Germany

Use this group box to track worker disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Field or Control	***Description***
Disabled Type	Identify the worker's disability type.
Handicap Percent	Enter the degree of the disability.
Disabled Position Count	Enter the degree to which this worker's disability can be applied to the total number of positions filled by disabled workers. Not every disabled worker may count as a full disabled position.
Evaluate	Enter the date that the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.
Part Time Work Details	Identify the workers part time work details.
Card Number, Card Issue Date, and **Expiry Date**	Enter the worker's disability card number, card issue date, and card expiration date.
Disability Status Office	For each disability card, enter the disability status office that issued the card.
City and**Postal Code**	Enter the city and postal code of the disability office.
Apprentice	Select the check box if the person is or has been an apprentice.
Apprentice Begin Date andApprentice End Date	Select the begin and end dates of the apprenticeship.

(ESP) Spain

Field or Control	***Description***
Disability Type	Select a disability type: • *Non Disability* (none) • *Physical Disability* • *Psychological Disability* • *Sensorial Disability*
Handicap Percent	Spanish law requires you to track a disabled worker's percentage of disability. Enter a percentage from *0* to *100.*
Help to Go to Work	Select if the worker needs physical assistance to go to work. This check box is available only to workers whose disability percentage is between 33% and 65%, and is used to calculate a tax deduction for that worker.
Evaluate	Enter the date when the disability was evaluated.
Card No. (card number),**Card Issue Date,** and **Exp. Date** (expiration date)	The Spanish government issues to people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date.
Disability Status Office	Select the office in charge of monitoring the worker's disability status.
City and**Postal Code**	Enter the city and postal code of the disability office.

(FRA) France

Use this group box to track worker disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled worker's social security commission, or Commission Technique d'Orientation et de Reclassement Professionnel (COTOREP).

Note: The COTOREP Disability Type and Categories are no longer applicable, but kept for historical tracking.

Field or Control	*Description*
Disability Type	Indicate the worker's disability type, which identifies whether the worker is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include widows, orphans, or spouses of a disabled person, and war widows. This information is tracked so that your company can complete the required report of this information in a manner similar to the French Disability report.
Begin Date	Enter the date that the disability started.
End Date	If the disability wasn't permanent, enter the disability end date.
Title Number	Enter the worker's disability number, assigned by COTOREP.
Notification Date	Record the date that your company notified the social security commission that you hired the worker.
Disability Rate	In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the worker. The purpose of this percentage is to enable a calculation for an allowance that is paid by the National Social Security Administration. A worker can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease. When applicable, enter the percentage of disability *(0* to *100* percent).

(FRA) Known as COTOREP

When you open the page, the fields in this group box are display-only. If you select *COTOREP* as the disability type, the fields become available.

Field or Control	***Description***
COTOREP Category	Enter the level of severity of the worker's disability, as defined by the social security commission. Values are: *COTOREP A:* Light disability. *COTOREP B:* Medium disability. *COTOREP C:* Severe disability.
Previous Placement	Select to indicate that the worker had a prior disability placement through COTOREP.
Previous Placement Type	If the worker had a previous placement, indicate the previous placement type.

(FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are display-only. If you select *WrkAcc/Dis* (work accident/disabled) as the disability type, the fields become available.

Field or Control	***Description***
Work Accident and**Disease**	Select whether the disability is the result of a work accident or a disease.
Professional Disease	If the disability is the result of a disease, select the type of disease.

(GBR) UK

Use this group box to track disability data for United Kingdom (UK) workers and to demonstrate compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Field or Control	***Description***
Registered Disabled Number	Enter the worker's Registered Disabled Number.
Disability	Select the worker's disability type.

(ITA) Italy

Field or Control	***Description***
Disability	Select the worker's disability type.
Disability Percentage	Enter the worker's disability percentage, as determined by the examining doctor.
Disability State Date and **Disability End Data**	Enter a range of dates for this disability. This information is used within the Disability Report to inform the government authorities of the number of employees with disabilities. See also the Disability Report ITA Page.

(JPN) Japan

Use this group box to track a worker's disability category and grades. This information is used for regulatory and tax reporting purposes.

Field or Control	***Description***
Disability Code	Enter the worker's disability code (values are legal disability categories that are set by the Ministry of Labor): *Disabled, Heavily disabled, Heavy mental disorder,* and *Mental disorder.*
Worker Comp Disability Grade (workers' compensation disability grade)	Select a value from *Grade 1* through *Grade 14.*
Disability Grade	Select a value from *Grade 1* through *Grade 7.*
WC Injury and Sickness Grade (workers' compensation injury and sickness grade)	Select a value from *Grade 1* through *Grade 3.*

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 (Wet Arbeid Gehandicapte Werknemers).

Field or Control	***Description***
Handicap Percent	Enter the percentage degree to which the worker is handicapped.

Field or Control	Description
Young Handicapped	Select to indicate that the worker qualifies for the tax reduction rule for young handicapped people (Wet arbeidsongeschiktheidsvoorziening jonggehandicapten, Wajong).

(USA) United States

Field or Control	Description
Disability Status	Shows the disability type option selected by the employee on the Voluntary Self-Identification of Disability Page or that was entered by the administrator for the employee in the USA section of the Disability page. Changing the status here selects or deselects, as appropriate, the Disabled check box in the Disability Status group box at the top of the page. See also "Disability - Voluntary Self-Identification of Disability Page" (PeopleSoft eProfile). The default value is *Not Disabled* unless the employee or administrator has entered the employee's self-identification disability data
Disclosure Date	Shows the date entered by the employee in the **Today's Date** field on the Voluntary Self-Identification of Disability page (or the date that was entered by the administrator for the employee in the USA section of the Disability page). **Note:** If the employee submits information more than once in the same day, the system stores the latest row that was entered on that day.
View History	Click this link to access the Disability History page (DISABILITY_USA_SEC) where you can view disability information previously entered for the employee.
Disabled Veteran	Select only if the worker is a disabled veteran. If the disabled veteran option is selected or deselected on the Veterans Status self-identification page, the system respectively selects or deselects the **Disabled Veteran** check box here.

(NZL) New Zealand

Field or Control	*Description*
Disability	Select the worker's disability type. These values come from the NZL Disability table.
Disability Program	Select if there is an association between the worker and a disability program.
Disability Note	Enter additional comments about the disability.

(AUS) Australia

Field or Control	*Description*
Information Not Given	Select if worker disability information is not provided.

Documenting Disability Accommodations

Use these three accommodation data pages to document that your company doesn't have discriminatory practices against people with disabilities:

- Accomm Request page

  Use the Accomm Request page (ACCOMM_REQUEST) to enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.

  Workforce Administration > **Personal Information** > **Disability** > **Disabilities** > **Accomm Request**

  Workforce Administration > **Personal Information** > **Disability** > **Disabilities BRA** > **Accomm Request**

- Accomm Option page

  Use the Accomm Option page (ACCOMM_OPTION) to enter the options that the organization or the person with a disability is considering to resolve each accommodation request.

  Workforce Administration > **Personal Information** > **Disability** > **Disabilities** > **Accomm Option**

  Workforce Administration > **Personal Information** > **Disability** > **Disabilities BRA** > **Accomm Option**

- Accomm Job Task page

Use the Accomm Job Task page (ACCOMM_JOB_TASK) to enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.

Workforce Administration > **Personal Information** > **Disability** > **Disabilities** > **Accomm Job Task**

Workforce Administration > **Personal Information** > **Disability** > **Disabilities BRA** > **Accomm Job Task**

When workers or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps that are involved in resolving those requests.

Related Links

"Managing Accommodation Data" (PeopleSoft Human Resources Meet Regulatory Requirements)

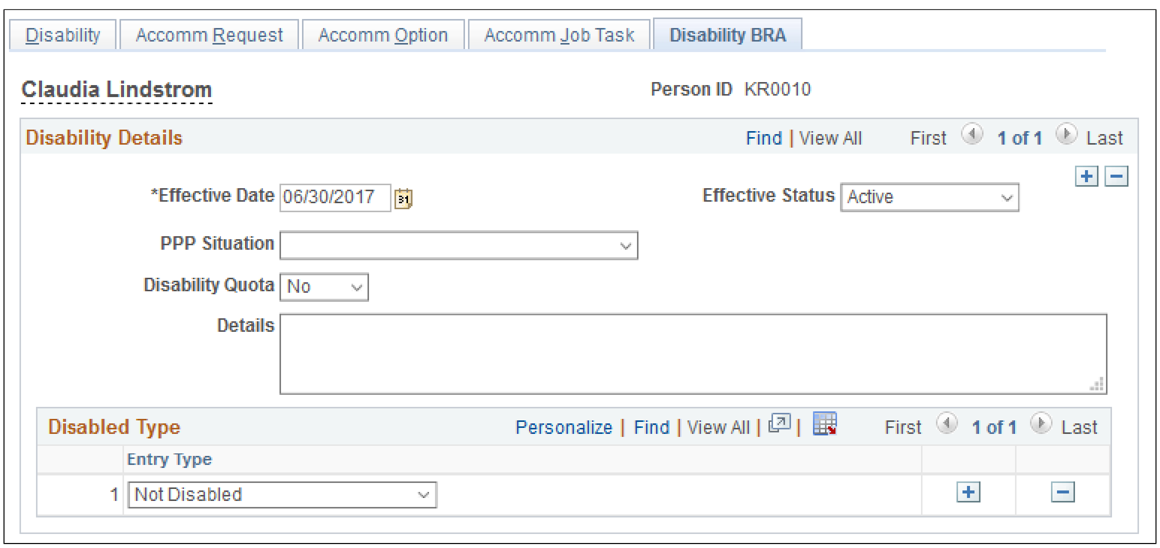
Disability BRA Page

Use the Disability BRA page (DISABILITY_BRA) to disability details.

Navigation:

Workforce Administration > **Personal Information** > **Disability** > **Disabilities BRA** > **Disability BRA**

This example illustrates the fields and controls on the Disability BRA page.



Field or Control	*Description*
Disabled Type	Select a disability type that applies to the employee for the given effective date. Values are: *Hearing Disability* *Intellectual Disability* *Mental Disability* *Multiple Disability* *Not Disabled* *Physical Disability* *Reduced Disability* *Rehabilitated* *Visual Disability* Information selected here is used in eSocial reporting.

Disability Report ITA Page

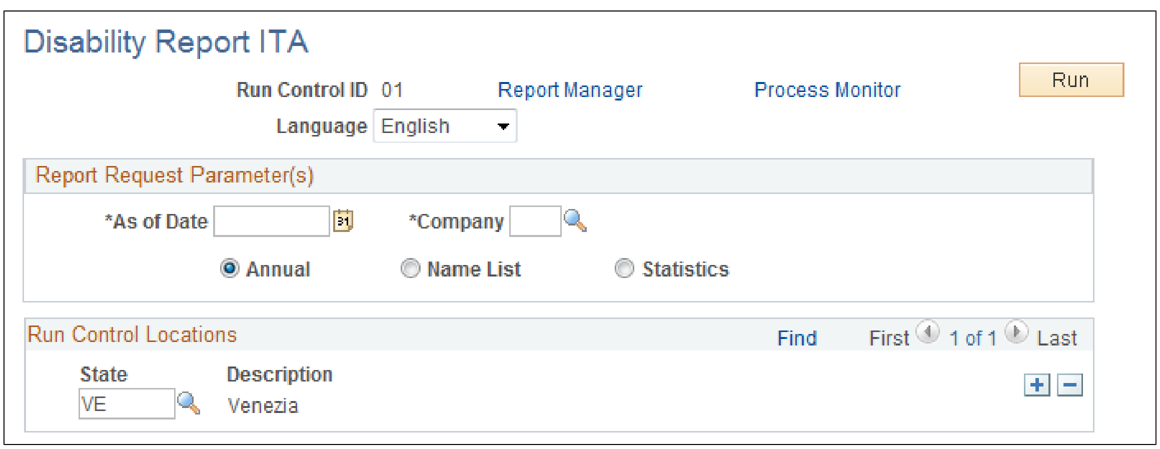
Use the Disability Report ITA page (RUNCTL_PER060) to run the Disability Report - ITA (PER060).

This run control page runs the Annual, Name List, or Disability Statistics reports.

Navigation:

Workforce Administration > **Personal Information** > **Disability** > **Disability Report ITA**

This example illustrates the fields and controls on the Disability Report ITA page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Annual	Select this option if you want to run the annual report, which lists the number of disabled workers sorted by disability type and gender.
Name List	Select this option if you want to run the report that lists the names of disabled workers by location and gender.
Statistics	Select this option if you want to run the report that lists locations and the number of disabled and able-bodied workers. Part and full-time disabled workers are counted as one. Part-time, able-bodied workers are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied workers are counted as 1.

When you select the **Name List** or **Statistics** options, the report uses the **As of Date** to extract all disabled active employees whose disabilities falls within the disability start and end date range identified on the Disability Page.

Field or Control	Description
State	Select the Italian state for which you are reporting disability statistics.
Description	Displays the description of the selected state for which you are reporting disability statistics.

Handling Company Credit Cards

In PeopleSoft Human Resources, you can identify company credit cards and then assign those cards to employees.

These topics provide an overview of credit card encryption, list prerequisites, and discuss handling company credit cards.

Pages Used to Handle Company Credit Cards

Page Name	Definition Name	Usage
Credit Card Vendors Page	CC_CARD_TBL	Enter vendors of credit cards that you'll assign to workers. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.

Page Name	***Definition Name***	***Usage***
Maintain Employee Credit Card Page	CC_CARD_DATA	Assign company credit cards to workers.
Credit Card Encryption Setup Page	CC_ENCRYPT_SETUP	View and update the Encryption and Decryption Profile IDs. You can also view the encryption flag, which indicates whether encryption is enabled.
Process Credit Card Encryption Page	CC_ENCRYPT_CRD_NBR	Encrypt preexisting credit card numbers according to the latest encryption standards of the system.

Understanding Credit Card Encryption

PeopleSoft Human Resources uses PeopleTools Pluggable Cryptography framework and encryption/decryption profiles (called encryption schemes) to encrypt and decrypt all credit card numbers stored in the database.

PeopleTools Pluggable Cryptography is an advanced security framework that provides a security model for applications to encrypt credit card data. Pluggable Cryptography provides a way for you to secure critical PeopleSoft data and communicate securely with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools, giving you strong cryptography with the flexibility to change and grow, by incrementally acquiring stronger and more diverse algorithms for encrypting data. In PeopleTools, pluggable cryptography capability is provided by PeopleSoft pluggable encryption technology (PET).

By using the PeopleTools Pluggable Cryptography for strong encryption/decryption, the Human Resources system encrypts data using Advanced Encryption Standard (AES) algorithms and 128, 192, or 256-bit encryption keys. When enabled, the system displays an *X* in place of each credit card number other than the last four digits. This includes credit card numbers that are display-only as well as those that are editable. The system encrypts all credit card numbers as soon as they are entered into the system on the Maintain Employee Credit Card page.

Use of the stronger Credit Card Encryption solution supports compliance with the cardholder data protection requirements of the Payment Card Industry (PCI) Data Security Standard and with Visa's Cardholder Information Security Program (CISP).

PeopleSoft Human Resources delivers the system data necessary for credit card encryption and decryption. Encryption and decryption of credit card numbers within the Human Resources system requires no additional setup.

Note: When the system publishes any messages that contain a credit card number (such as the CORPORATE_CARD_DATA_SYNC message) the systems uses clear text rather than encrypted data for the credit card number because the message is being sent via a secured queue. The secured queue likewise meets the requirement of the PCI Data Security Standard. The message CORPORATE_CARD_DATA_FULLSYNC also comes delivered but is not implemented in the system. To use this message you must write code to decrypt the credit card number before publishing the message.

For information on cryptography, see the “Securing Data with Pluggable Cryptography” topic in the documentation, *PeopleTools: Security Administration*

Prerequisite

You must have defined credit card types on the Translate table before entering credit card vendors.

Credit Card Vendors Page

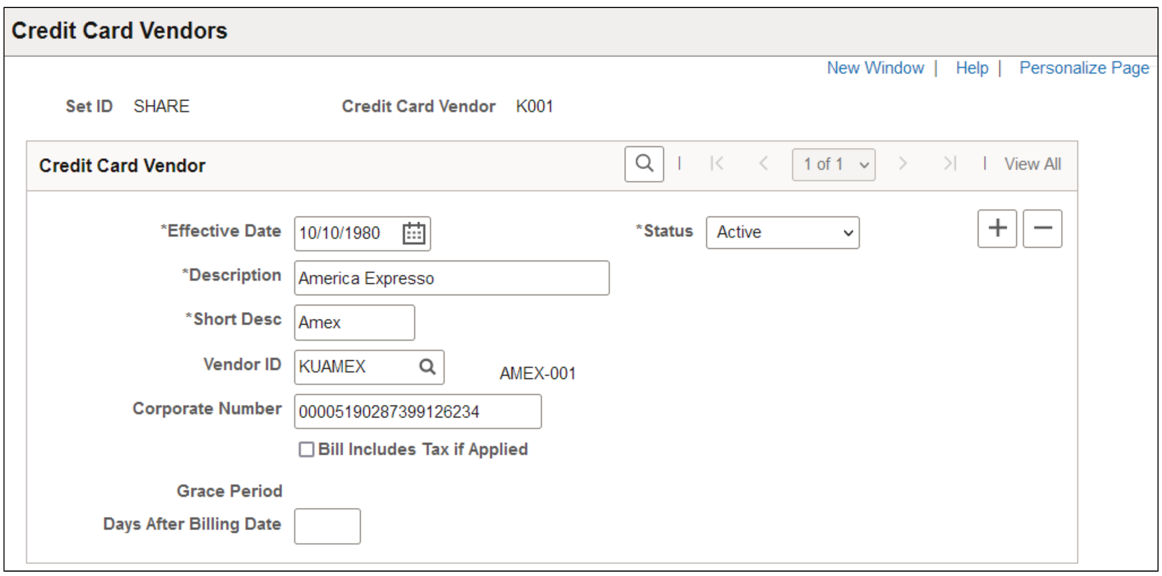
Use the Credit Card Vendors page (CC_CARD_TBL) to enter vendors of credit cards that you'll assign to workers.

A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Credit Card Vendors** > **Credit Card Vendors**

This example illustrates the fields and controls on the Credit Card Vendors page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Vendor ID	Enter the vendor ID.
Corporate Number	Enter your company's corporate number. This isn't a credit card number.
Bill Includes Tax if Applied	Select if the bill includes tax.
Grace Period andDays After Billing Date	Enter the number of days allowable after the billing date to avoid additional charges.

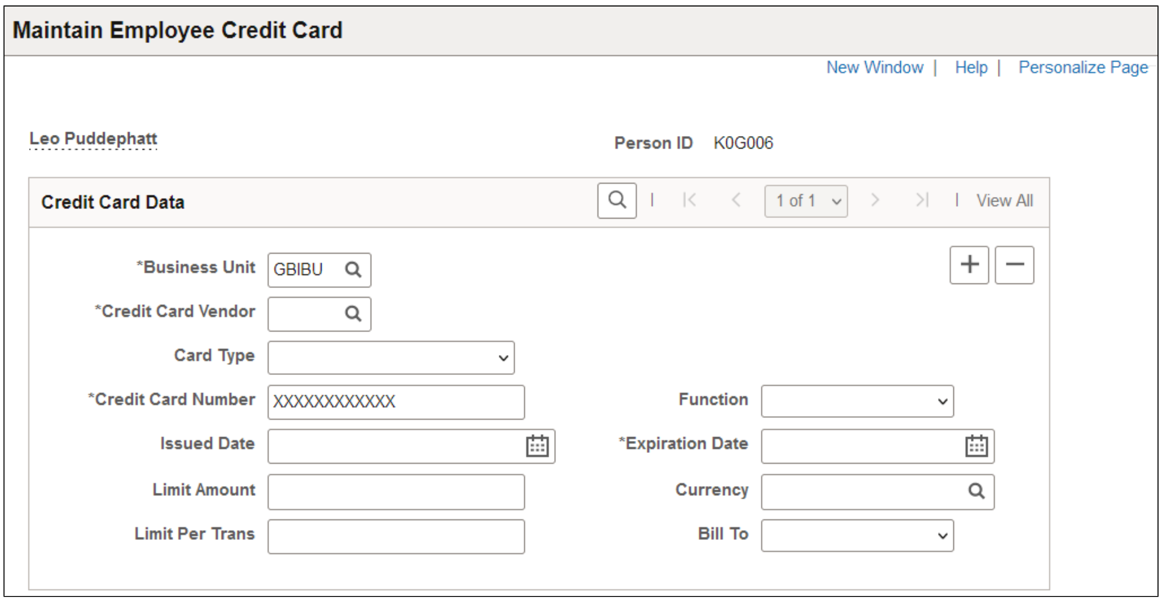
Maintain Employee Credit Card Page

Use the Maintain Employee Credit Card page (CC_CARD_DATA) to assign company credit cards to workers.

Navigation:

Workforce Administration > **Job Information** > **Maintain Employee Credit Card** > **Maintain Employee Credit Card**

This example illustrates the fields and controls on the Maintain Employee Credit Card page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Credit Card Vendor	Select the card's vendor.
Card Type	Select the card type.
Credit Card Number	Enter the card number. The system masks the credit card number except for the last four digits. The masking of the credit card number is visible only after saving the data and then accessing the page again for that employee. To update an existing credit card number you must delete the existing number and enter the new number in its entirety, even if you are only modifying the last four digits. See Understanding Credit Card Encryption.
Function	Select the main function for this card (for example, debit card, phone card, or corporate card).
Issued Date	Enter the date that the card was issued.

Field or Control	*Description*
Expiration Date	Enter the date that the card expires.
Limit Amount	Enter the credit card limit amount.
Currency	Enter the currency of the credit card.
Limit Per Trans (limit per transaction)	Enter the limit amount per transaction.
Bill To	Select whom to bill for this credit card.

Credit Card Encryption Setup Page

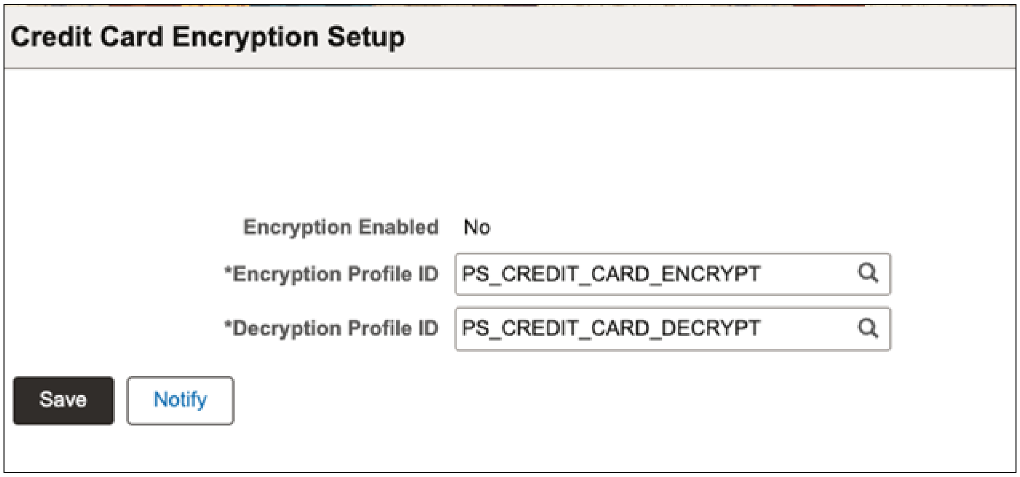
Use the Credit Card Encryption Setup page (CC_ENCRYPT_SETUP) to view and update the Encryption and Decryption Profile IDs. You can also view the encryption flag, which indicates whether encryption is enabled.

Navigation:

Set Up HCM > **System Administration** > **Utilities** > **Credit Card Encryption Setup**

This example illustrates the fields and controls on the Credit Card Encryption Setup page. You can find definitions for the fields and controls later on this page.

This example illustrates the fields and controls on the Credit Card Encryption Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Encryption Enabled	Displays *Yes* when encryption has been enabled for the profile ID using the Process Credit Card Encryption Page. You can modify the Encryption and Decryption Profile IDs only when encryption has not been enabled.
Encryption Profile ID	Enter the profile ID associated with credit card encryption. You can modify this field only if encryption has not been enabled with the Process Credit Card Encryption Page. If encryption has been enabled, this field is display only.
Decryption Profile ID	Enter the profile ID associated with credit card decryption. You can modify this field only if encryption has not been enabled with the Process Credit Card Encryption Page. If encryption has been enabled, this field is display only.

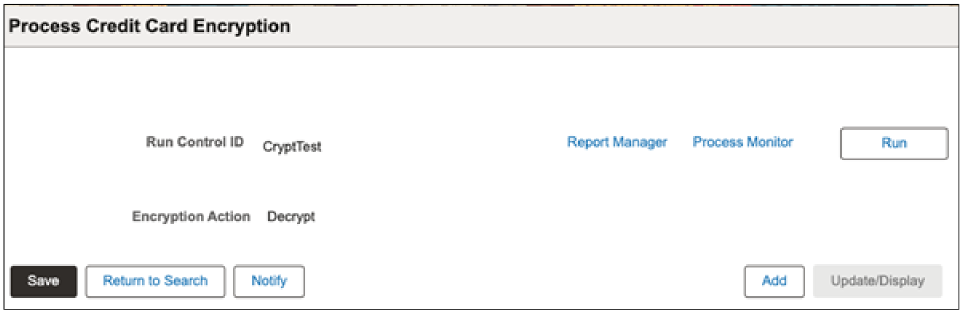
Process Credit Card Encryption Page

Use the Process Credit Card Encryption page (CC_ENCRYPT_CRD_NBR) to encrypt and decrypt the profile IDs according to the latest encryption standards of the system.

Navigation:

Set Up HCM > **System Administration** > **Utilities** > **Process Credit Card Encryption**

This example illustrates the fields and controls on the Process Credit Card Encryption page. You can find definitions for the fields and controls later on this page.



Note: Run this process one time to encrypt pre-existing credit card numbers only if you have unsecured data in the Credit Card Number field on the Maintain Employee Credit Card page.

Field or Control	***Description***
Run Control ID	Displays the run control ID entered in the Add page.
Encryption Action	The Encryption Action displays *Encrypt* when encryption is disabled in the Credit Card Encryption Setup Page. The action displays *Decrypt* when encryption is enabled.
Run	Click this button to encrypt or decrypt the pre-existing data for the selected field.

Handling Company Property

To set up the handling of company property, use the Setup Company Property (COMPANY_PROP_TBL) component.

These topics discuss handling company property.

Pages Used to Handle Company Property

Page Name	***Definition Name***	***Usage***
Company Property Page	COMPANY_PROP_TBL1	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value Page	COMPANY_PROP_TBL2	Assign values to company property.
Job Information - Company Property Page	COMPANY_PROPERTY	Assign company property to workers.

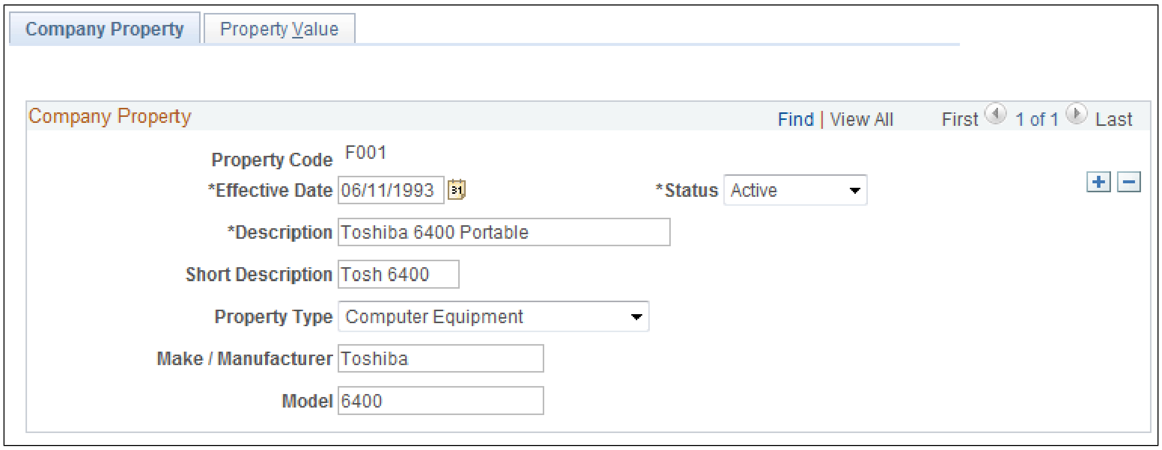
Company Property Page

Use the Setup Company Property - Company Property page (COMPANY_PROP_TBL1) to identify company property, such as vehicles, computer equipment, tools, or uniforms.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Setup Company Property** > **Company Property**

This example illustrates the fields and controls on the Setup Company Property - Company Property page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Property Code	Displays the property code for this item.
Property Type	Select a type of property, such as *Vehicle* or *Computer Equipment.*
Make / Manufacturer	Enter the make and manufacturer for this item.
Model	Enter the model.

Car Identification

If you select *Vehicle* as the property type, this group box appears in place of the **Make/Manufacturer** and **Model** fields.

Field or Control	***Description***
Car Identification	When you enter a car ID, the system automatically completes the **Registration Number,** **Make/Model,** and **Color** fields based on the values stored for that car ID.

Field or Control	***Description***
Make/Model	Enter the make and model for this car.
Registration Number	Enter the car's registration number.
Color	Enter the car's color.

Related Links

PeopleSoft Human Resources Plan Careers and Successions

"Entering Non-Employee Data" (PeopleSoft Human Resources Monitor Health and Safety)

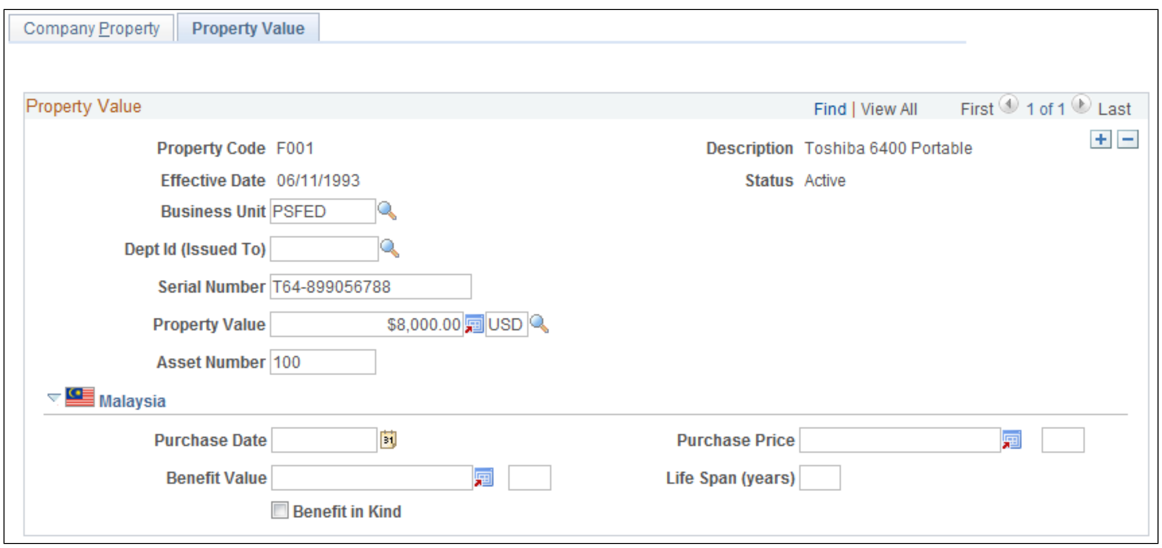
Property Value Page

Use the Property Value page (COMPANY_PROP_TBL2) to assign values to company property.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Setup Company Property** > **Property Value**

This example illustrates the fields and controls on the Property Value page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Dept ID (Issued To)	Enter the identification number of the department to which the property was issued.
Serial Number	Enter the serial number.

Field or Control	***Description***
Property Value	Enter the value of the property and the currency that you are using.
Asset Number	Enter the asset number.

(MAL) Malaysia

Field or Control	***Description***
Purchase Date	Enter the date the company property was purchased.
Purchase Price	Enter the purchase price.
Benefit Value	Enter the value of the benefit to be used in calculations.
Life Span (years)	Enter the number of years expected for the life span of the company property.
Benefit in Kind	Select to specify if this property is a Benefit in Kind (BIK).

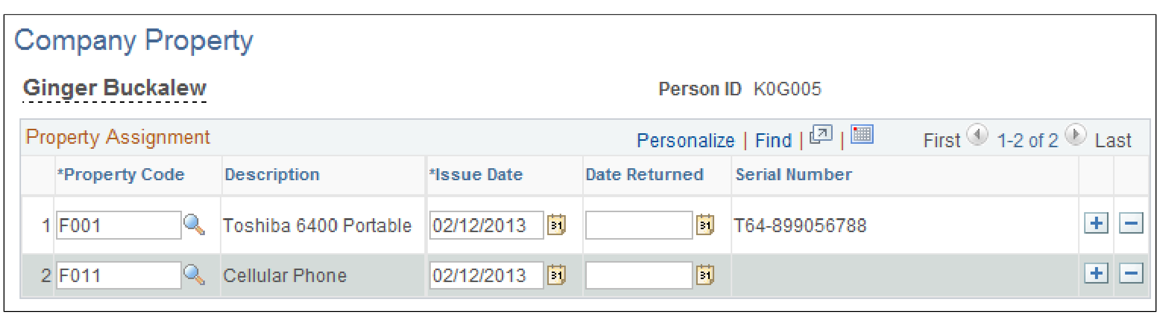
Job Information - Company Property Page

Use the Job Information - Company Property page (COMPANY_PROPERTY) to assign company property to workers.

Navigation:

Workforce Administration > **Job Information** > **Company Property**

This example illustrates the fields and controls on the Job Information - Company Property page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Property Code	Enter the property code for the item that you've assigned to the worker.
Issue Date	Enter the date that you issued the property to the worker.
Date Returned	After the worker returns the property, enter the date that it was returned.
Serial Number	The system displays the serial number of the item that you've assigned to the worker.

Related Links

"Entering Non-Employee Data" (PeopleSoft Human Resources Monitor Health and Safety)

Managing Names Data

These topics provide an overview of additional name types and discuss managing name data.

Pages Used to Enter Additional Names

Page Name	*Definition Name*	*Usage*
Additional Names Page	NAMES_OTHER	View or create additional name types and names for an individual.
Name History Page	NAME_HISTORY_SEC	View the history of an individual's name type and update or add a new effective date for that name type.

Understanding Additional Name Types

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records.

When you create a Personal Data record, the system automatically creates a primary name for the person you have added. The system also enables you to track other name types such as legal, preferred, maiden, or some other name for the person. For example, when the divorced Ms. Edith Jones advises your organization that she has remarried and changed her last name to Brown, you can maintain her preferred and primary name, Edith Carter; her former name, Edith Jones; and her maiden name, Edith Brown. You can determine when these name changes occurred by reviewing the history of each name type in the Additional Names component.

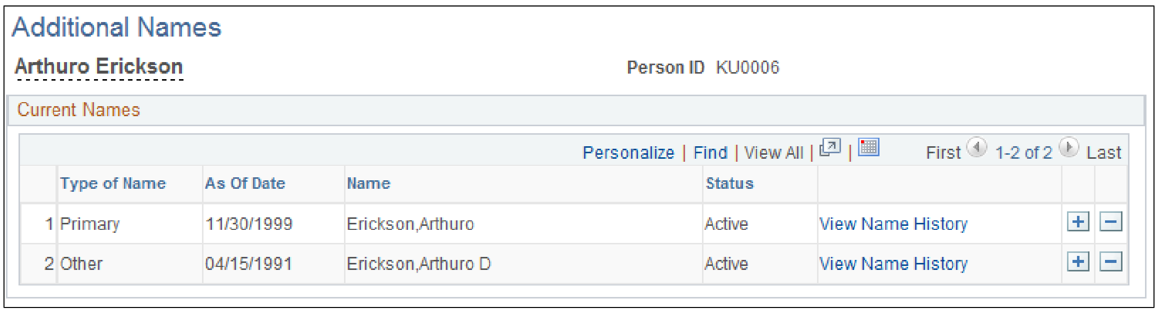
Additional Names Page

Use the Additional Names page (NAMES_OTHER) to view or create additional name types and names for an individual.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Additional Names** > **Additional Names**

This example illustrates the fields and controls on the Additional Names page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Type of Name	Displays the individual's current name types. The *Primary* name type displays from personal data. To add another name type, insert a new row and select the type of name, such as *Preferred, Legal,* or *Maiden,* to add for this individual. Only those remaining name types that are not yet displayed on the page will be available for selection. Values for this field are set up on the Name Type Table page. **Note:** Although the Additional Names page displays the *Primary* name information for the person, maintenance of this name type should be done in personal data in the Modify a Person component. When you click the link to view or edit name history, you are unable to add additional rows for the *Primary* type row from this component.
Name	Displays the individual's name as it appears in the default display name format for the selected name type.
Add Name Data, View Name History, or**Edit Name History**	The name of the link varies depending up on if you have inserted a new type of name row or entered the page using the Correct History action. Click the link to access the Name History page and view or update data for an existing name type.

Name History Page

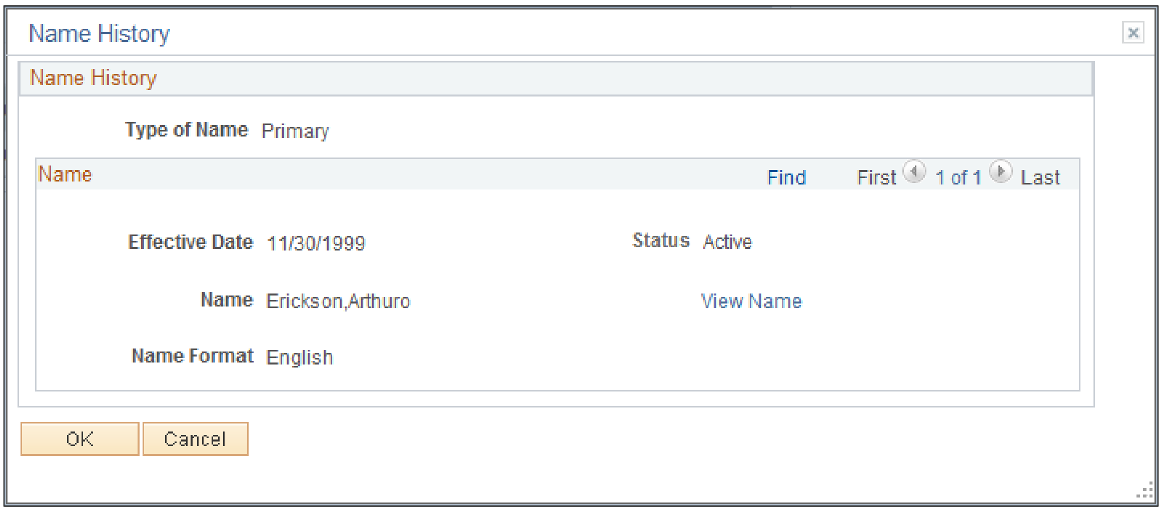
Use the Name History page (NAME_HISTORY_SEC) to view the history of an individual's name type and update or add a new effective date for that name type.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Additional Names**

Click the **Add Name Data, View Name History,** or **Edit Name History,** link on the Additional Names page.

This example illustrates the fields and controls on the Name History page. You can find definitions for the fields and controls later on this page.



The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select. To update the current name type for the individual, insert a new row, specify the effective date, name format, and status, and click the **Edit Name** link to update the related name fields.

Field or Control	***Description***
Edit Name or **View Name**	Click this link to view or edit related name fields. The name of the link varies depending on if you are adding a new name type, correcting a name, or viewing an existing name. **Note:** When viewing the *Primary* name type of an individual, the add a new row and delete buttons are not available. Updates to the *Primary* name of an individual should be done in personal data in the Modify a Person component.

Tracking Dependent and Beneficiary Data

These topics provide an overview of dependent and beneficiary data and discuss tracking dependent and beneficiary data.

Pages Used to Track Dependent Identification Data

Page Name	***Definition Name***	***Usage***
Dependent Information - Name Page	DEPEND_BENEF1	Enter or update information about a dependent's name.
Dependent Information - Address Page	DEPEND_BENEF_ADDR	Enter or update information about a dependent's address.
Dependent Information - Personal Profile Page	DEPEND_BENEF2	Enter or update information about a dependent.
Dependent/Beneficiary Riders Page	DEPBEN_RIDERS	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.
Personal Profile - Phone Numbers Page	DEP_BENEF_PHON_SEC	Enter additional dependent and beneficiary phone numbers.
(NLD) Dependent/Beneficiary Summary Page Review Dep/Ben Summary Page (See Dependent/Beneficiary Summary Page	DEPEND_BENEF_SUMM	View an employee's beneficiaries and dependents.
Dependent Identification - Depdnt Citizenship/Passport Page	CITIZEN_PP_DEP	Enter or update dependent citizenship and passport data.
Depdnt Visa/Permit Data Page	VISA_PERMIT_DEP	Enter or update dependent visa and permit data.
Dependen Benf History FPS Page	FPADEPENLK_PNL	Maintain dependent and beneficiary history for French Public Sector employees.

Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This definition affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

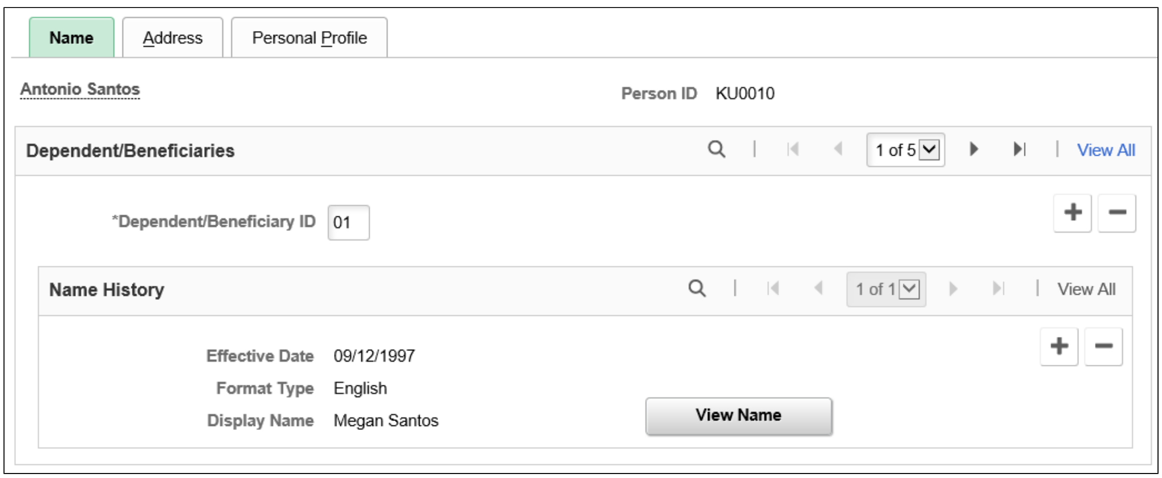
Dependent Information - Name Page

Use the Dependent Information - Name page (DEPEND_BENEF1) to enter or update information about a dependent's name.

Navigation:

- **Workforce Administration** > **Personal Information** > **Personal Relationships** > **Dependent Information** > **Name**
- **Workforce Administration** > **Global Assignments** > **Track Assignment** > **Dependent Data** > **Name**

This example illustrates the fields and controls on the Dependent Information - Name page. You can find definitions for the fields and controls later on this page.



The system displays the name and the employee ID for the employee.

Field or Control	***Description***
Dependent/Beneficiary ID	The system assigns the dependent or beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.
Effective Date	The system enters the current system date in this field, and this date is carried through to all pages of the component. You can change this date if necessary, however in the first row of data for this dependent/beneficiary, the effective date must be the same on all of the pages in this component.

Field or Control	Description
Edit Name	Click to access the Edit Name page. On this page, enter the dependents name and click **Refresh** to update the fields that display the dependents' name.

Note: When running a calculation, the system determines if an employee is married by reviewing the dependent and beneficiary table to determine whether there is a dependent identified as the spouse. It is possible for the dependent and beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent and beneficiary data can cause problems with pension calculations. It is best to verify dependent and beneficiary information when calculating pension benefits.

(FRA) French Public Sector

The page displays this section when French Public Sector is enabled on the Installation Table.

Field or Control	Description
Civil Servant Status	Select to indicate that this dependent is a civil servant.
Same Public Service	Select if the dependent is in the same public service as the employee.
Employee ID of the Dependent	When the **Same Public Service** field is selected, this field is editable. Select the Employee ID of the dependent that is in the same public service as the employee.
Employer Name	Enter the employer name of the dependent.

Related Links

“Entering Dependent and Beneficiary Information” (PeopleSoft Human Resources Manage Base Benefits)

Dependent Information - Address Page

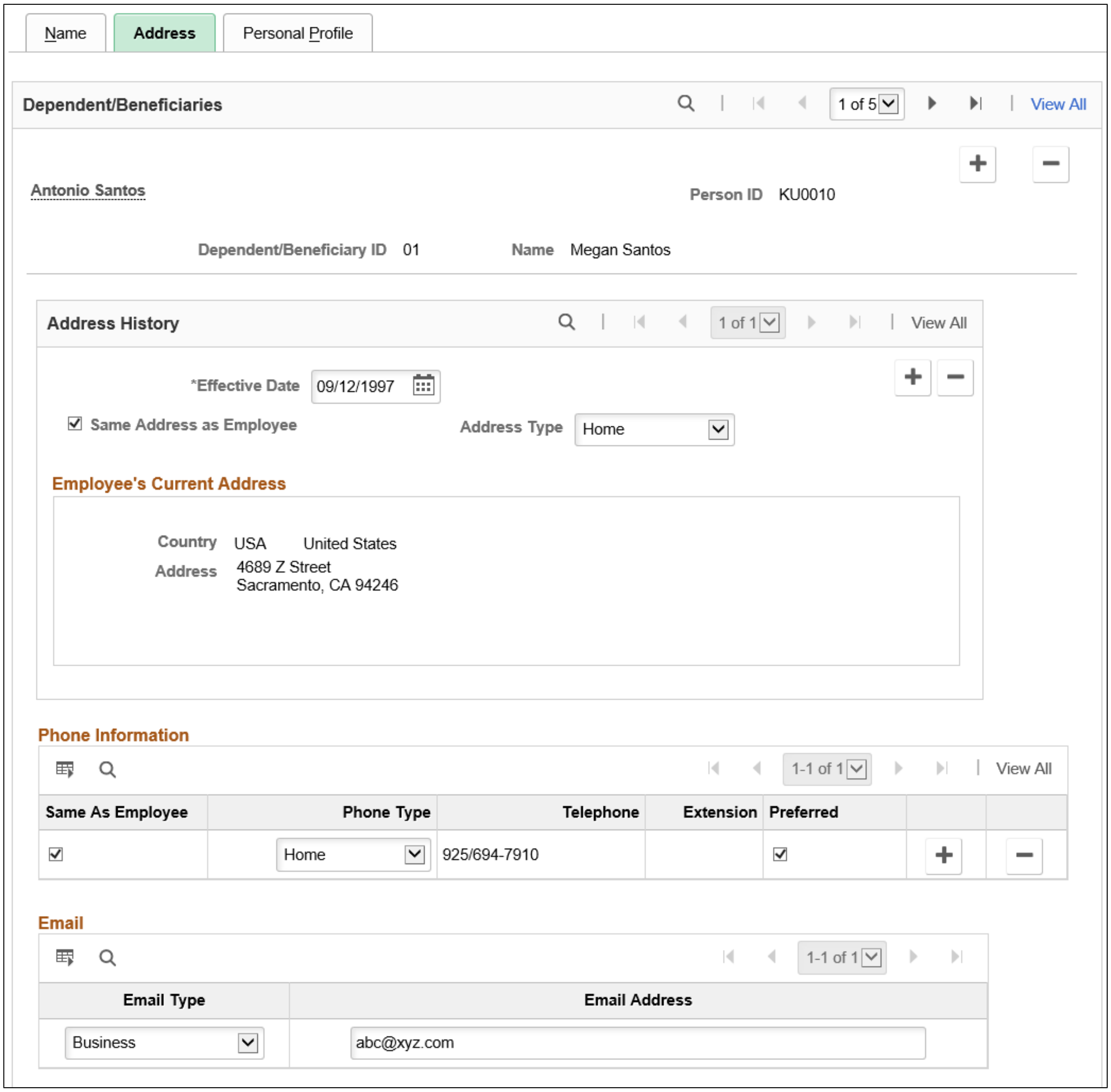
Use the Dependent Information - Address page (DEPEND_BENEF_ADDR) to enter or update information about a dependent's address.

Navigation:

- **Workforce Administration** > **Personal Information** > **Personal Relationships** > **Dependent Information** > **Address**

- **Workforce Administration > Global Assignments > Track Assignment > Dependent Data > Address**

This example illustrates the fields and controls on the Dependent Information - Address page. You can find definitions for the fields and controls later on this page.



The employee's name and employee ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Field or Control	*Description*
Same Address as Employee and **Address Type**	Select if the dependent/beneficiary has the same address information as the employee, and then select the employee's address type that matches the dependent/beneficiary's address. If selected, you don't need to complete any of the address fields. To add a different address, deselect the 'Same Address as Employee' check box, select an address type and enter the new address.
Same Phone as Employee and **Phone Type**	Select if the dependent/beneficiary has the same phone information as the employee, and then select the employee's phone type that matches the dependent/beneficiary's phone. If selected, you don't need to complete any of the phone fields. To add a different phone number, deselect the 'Same Phone as Employee' check box, select a phone type and enter the new number in the Telephone field. A beneficiary can have the same address as the employee but a different phone number.
Preferred	Select the check box to set the phone number as the preferred number to contact.
Email	Select the email type and enter the dependent or beneficiary's email address.

Related Links

"Administering Country Codes" (Application Fundamentals)

"(NLD) Loading Dutch Postal Codes" (Application Fundamentals)

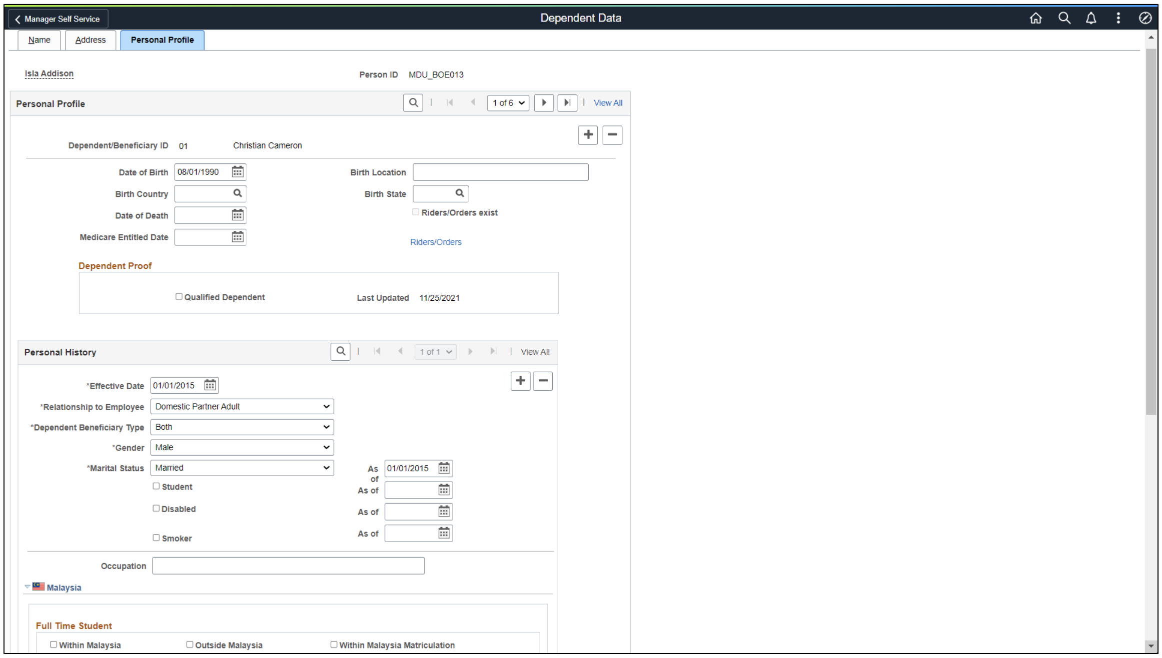
Dependent Information - Personal Profile Page

Use the Dependent Information - Personal Profile page (DEPEND_BENEF2) to enter or update information about a dependent.

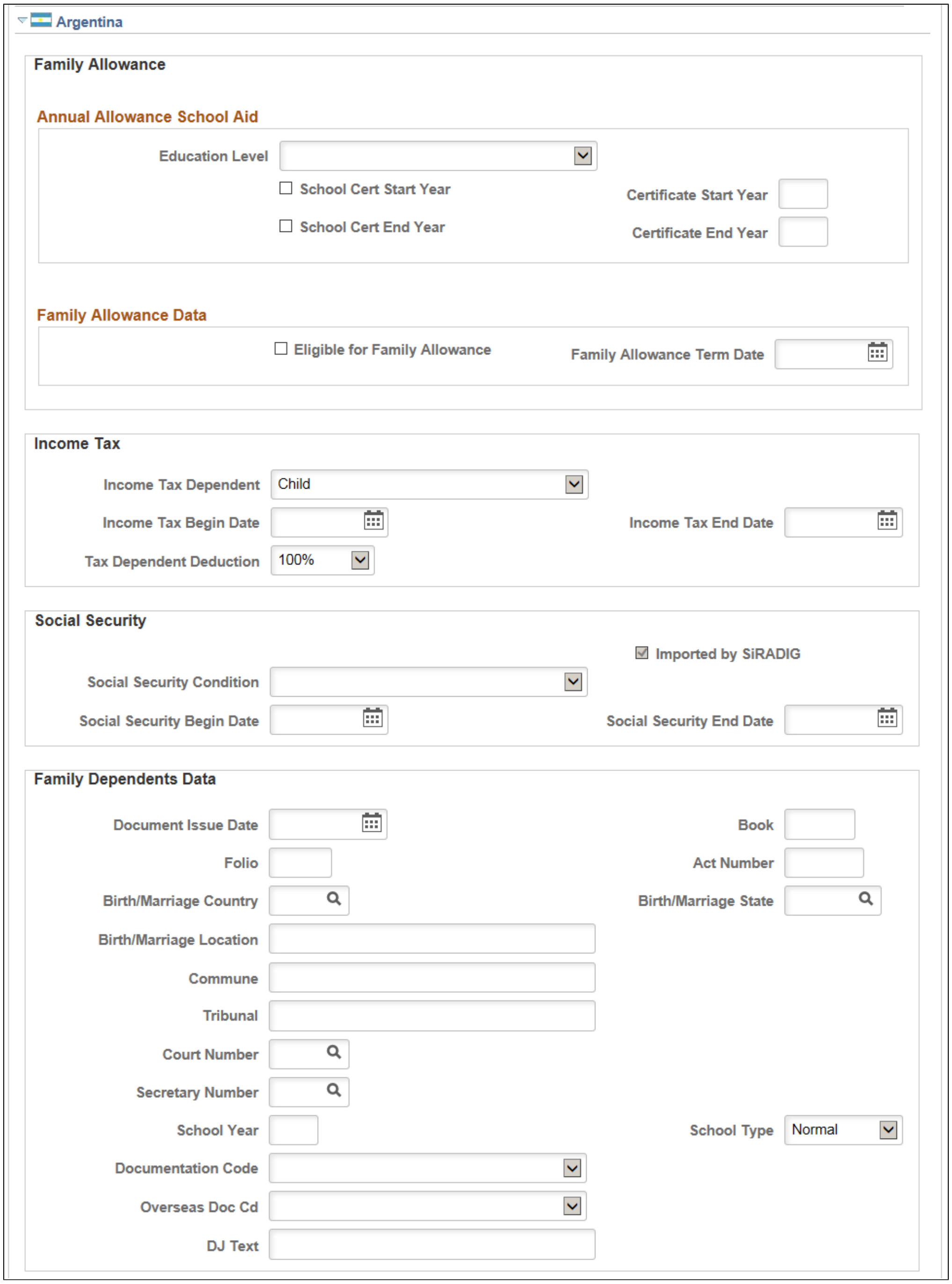
Navigation:

- **Workforce Administration** > **Personal Information** > **Personal Relationships** > **Dependent Information** > **Personal Profile**
- **Workforce Administration** > **Global Assignments** > **Track Assignment** > **Dependent Data** > **Personal Profile**

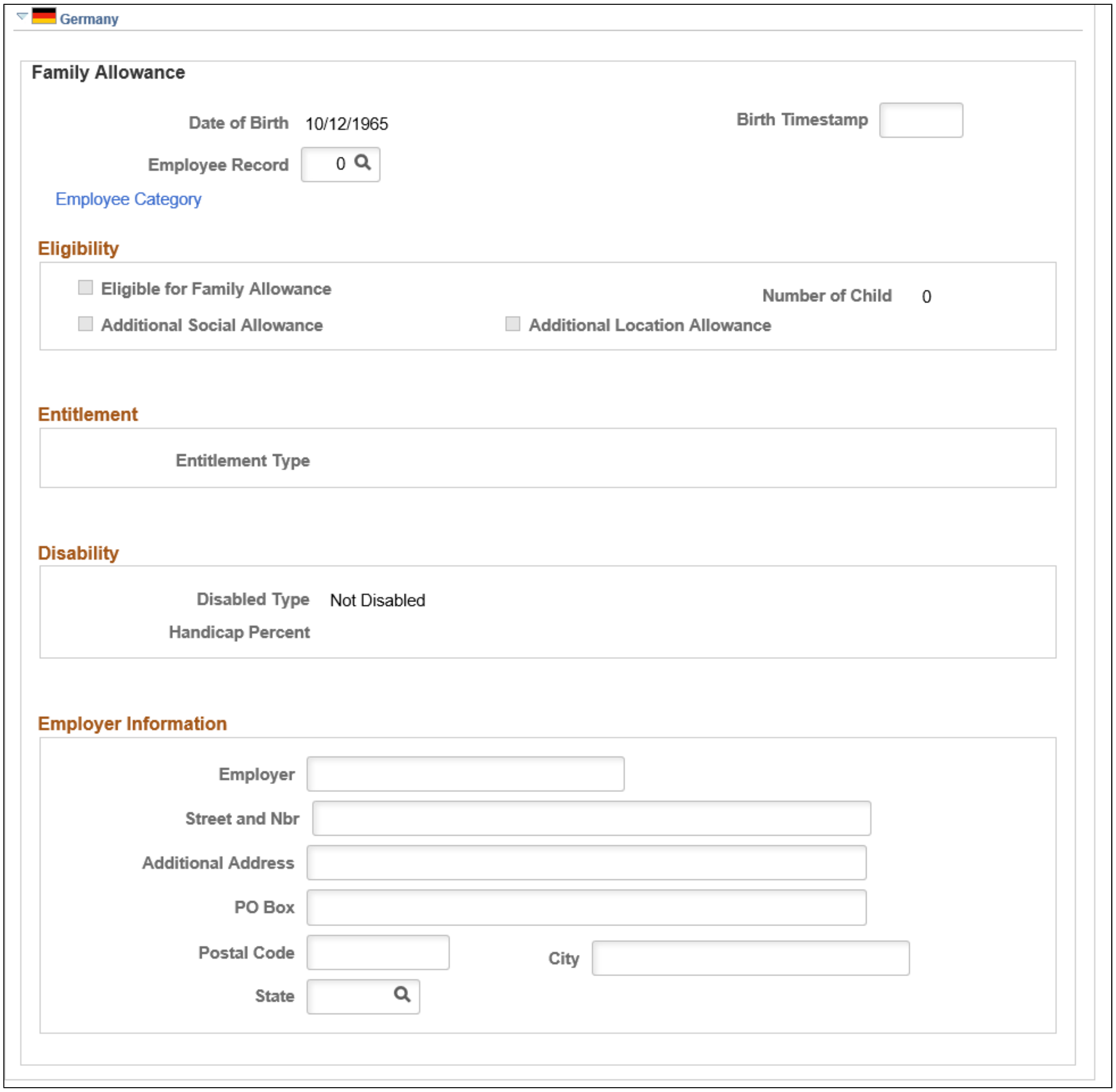
This example illustrates the fields and controls on the Dependent Information - Personal Profile page (1 of 6). You can find definitions for the fields and controls later on this page.



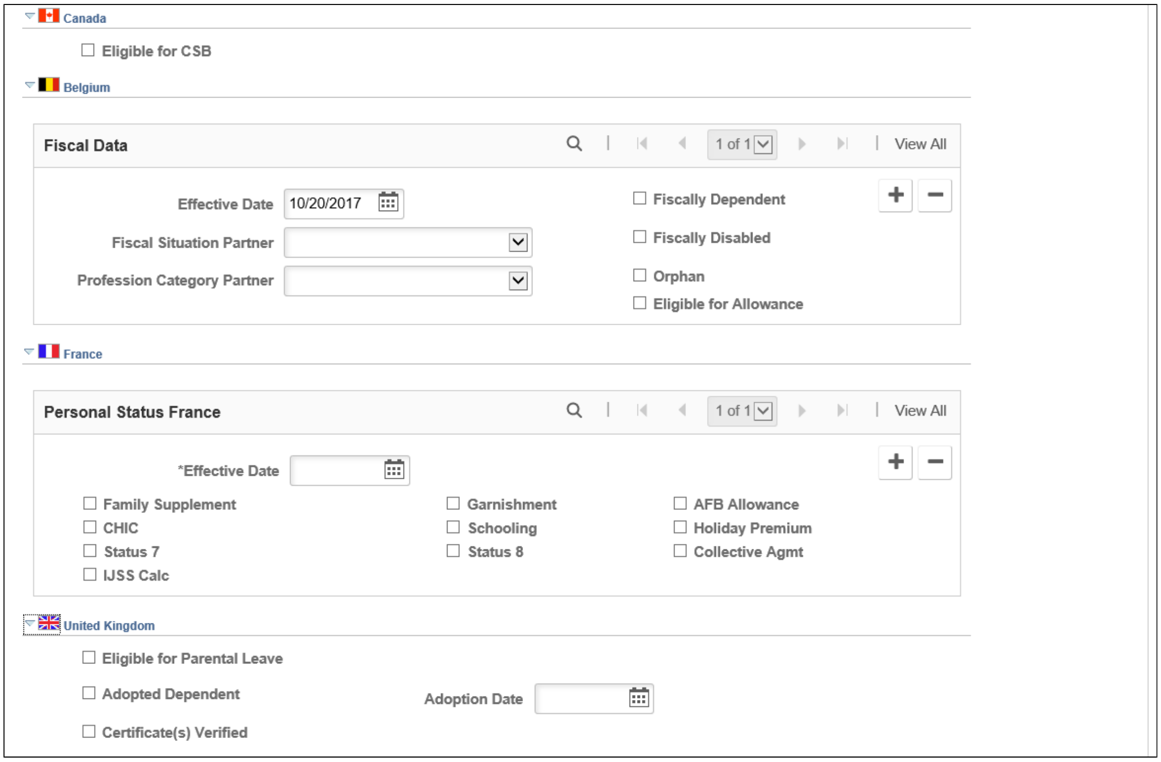
This example illustrates the fields and controls on the Dependent Information - Personal Profile page (2 of 6). You can find definitions for the fields and controls later on this page.



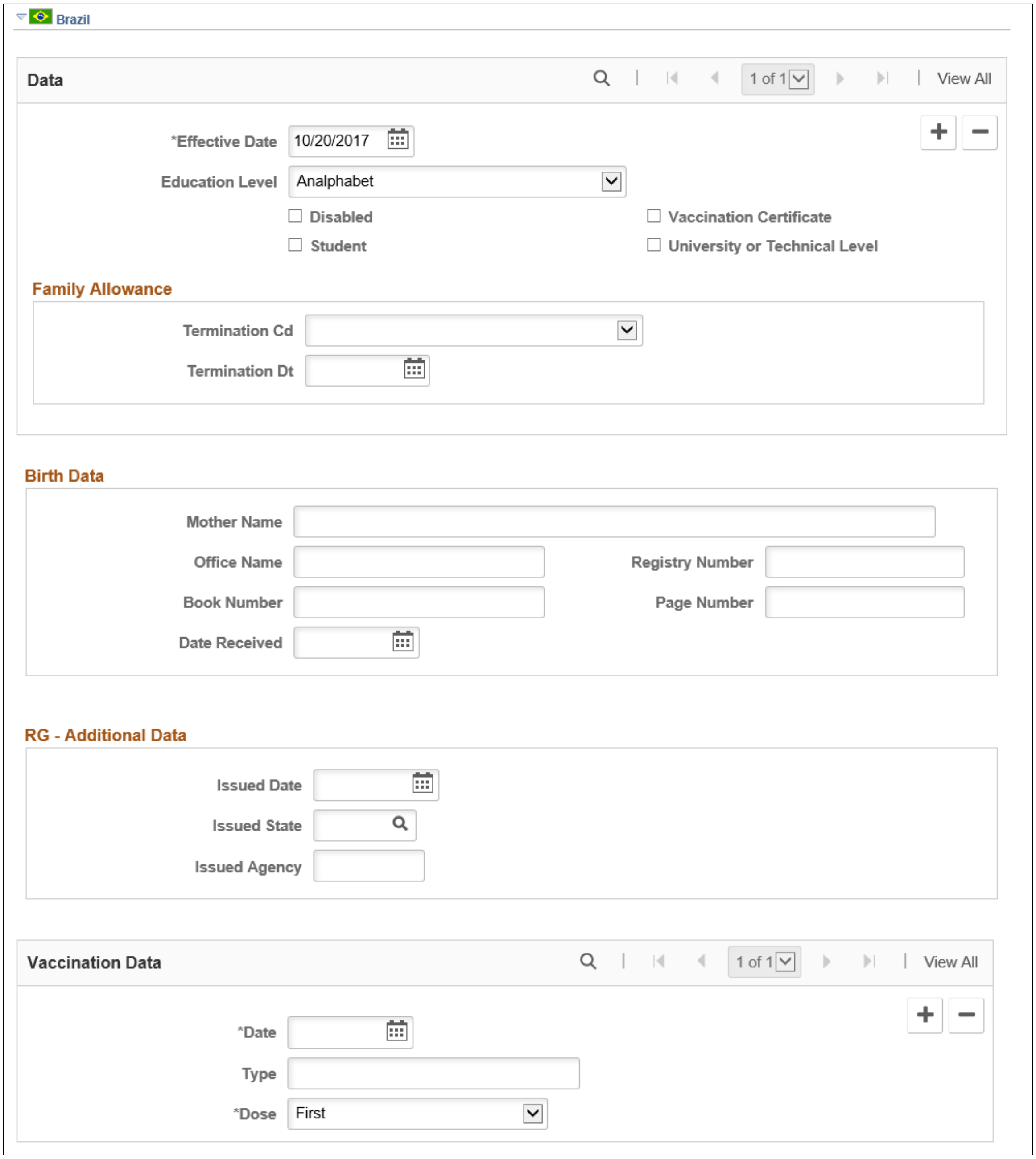
This example illustrates the fields and controls on the Dependent Information - Personal Profile page (3 of 6). You can find definitions for the fields and controls later on this page.



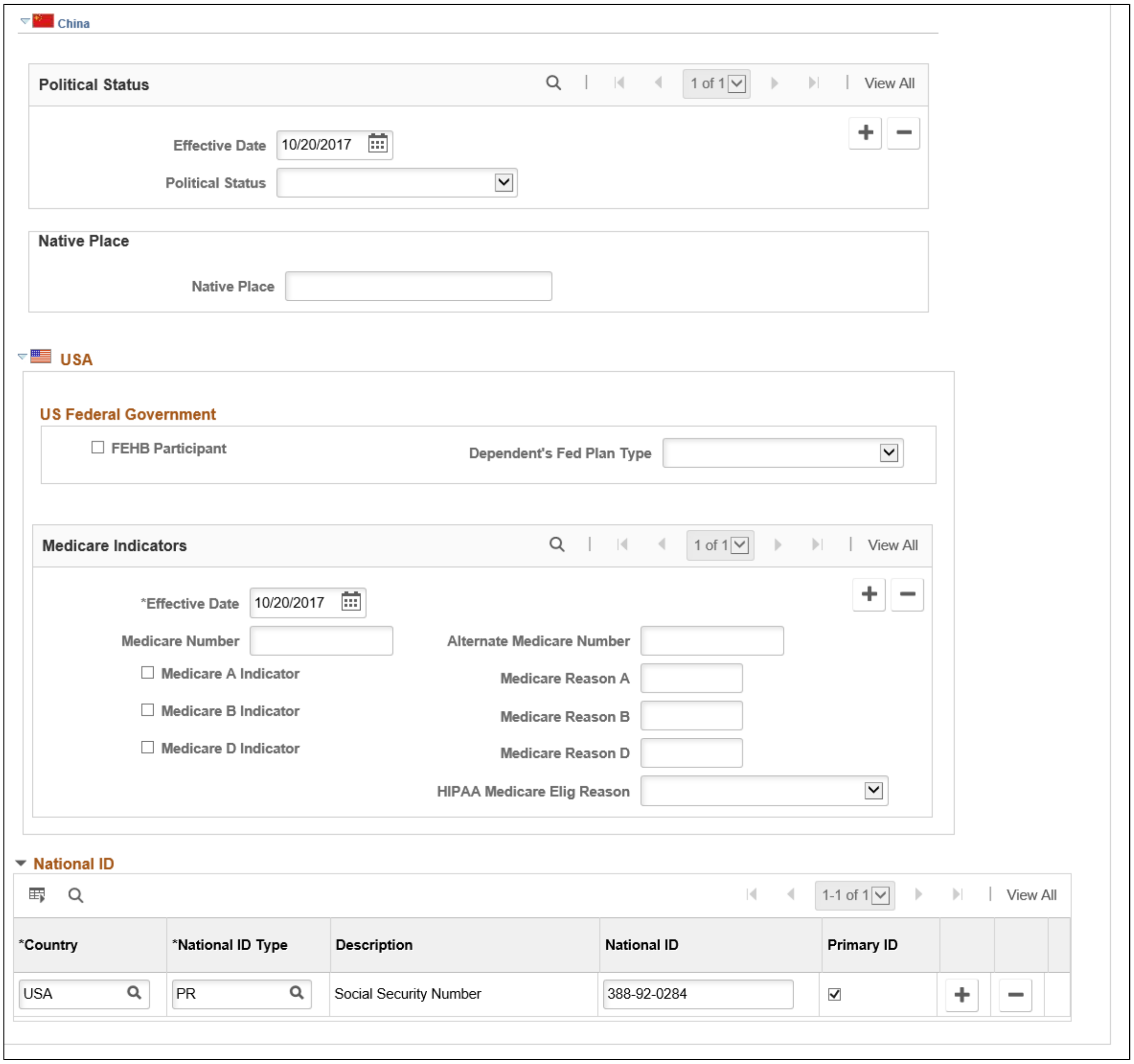
This example illustrates the fields and controls on the Dependent Information - Personal Profile page (4 of 6). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Dependent Information - Personal Profile page (5 of 6). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Dependent Information - Personal Profile page (6 of 6). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Date of Birth	Enter the dependent or beneficiary's birth date. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.
Birth Location	Enter a city, county, or both, to further define the place in which the dependent or beneficiary was born.
Birth Country	Enter the country in which the dependent or beneficiary was born. Depending on the country you enter, additional fields may appear that require more data entry.
Date of Death	When the dependent or beneficiary dies, enter the date of the death.

Field or Control	*Description*
Medicare Entitled Date	Enter the date on which the dependent or beneficiary will become eligible for Medicare coverage.
Riders/Orders	Click to access the Dependent/Beneficiary Riders page.

Dependent Proof

Field or Control	*Description*
Qualified Dependent	This check box is automatically 'De-selected' when a dependent is added or updated and supporting documents are required. The check box is automatically updated to 'Selected' if all required documents are uploaded and approved. **Note:** If Administrator would like to override this check box, administrator should review and clean up any outstanding document upload and approval requirement first.
Last Updated On	The date is automatically updated when the Qualified Dependent check box is switched between selected and deselected.

Personal History

Field or Control	*Description*
Effective Date	Enter a new effective date for each change to a dependent's personal history. **Note:** For a newborn child, make sure that you enter the child's birth date as the first effective date.
Relationship to Employee	Enter the dependent or beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the **Relationship to Employee** field according to the relationships in the table.

Field or Control	*Description*
Dependent Beneficiary Type	Select the type of dependent or beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary. If you have set up the Dependent table, the system uses that information to populate and validate this field. Values are: *Beneficiary:* Beneficiary only. *Both:* Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option. *COBRA Dependent Only:* COBRA dependent or beneficiary only. *Dependent:* Dependent only. *None:* The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of a U.S. savings bond, or to make a person ineligible to participate in a benefit plan. *QDRO Estate:* If the beneficiary of a life plan is the estate of an employee, enter this value. *QDRO Representative - Employee:* Used for PeopleSoft Pension Administration. *QDRO Representative - Recipient:* Used for PeopleSoft Pension Administration. **Note:** (USA) (CAN) The values *COBRA Dependent Only, None, QDRO Representative - Employee,* and *QDRO Representative - Recipient* are Canadian and United States values only.
Marital Status	Enter the dependent or beneficiary's marital status.
Marital Status - As of	When adding a new dependent, enter the as of date for marital status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Student	Select if the dependent or beneficiary is a student.

Field or Control	*Description*
Student - As of	When adding a new dependent, enter the as of date for the individual's student status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Disabled	Select if the dependent or beneficiary is disabled.
Disabled - As of	When adding a new dependent, enter the as of date for the individual's disability status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Smoker	Select if the dependent or beneficiary smokes. The **Smoker** check box is necessary for dependents who are enrolled in benefit plans that use calculation rules. The system calculates age-graded rates for individuals differently depending on whether they smoke.
Smoker - As of	When adding a new dependent, enter the as of date for the individual's smoker status. When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.
Occupation	Enter the dependent or beneficiary's occupation, if known.

National ID

Use this group box to enter the dependent or beneficiary's national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

Field or Control	*Description*
Country	Select the country that issued the dependent's national ID.

Field or Control	*Description*
National ID Type	The system populates this field automatically with the default value that you established for this country on the National ID Type Table page. You can select another valid type.
National ID	Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format that you entered on the National ID Type Table page.
Primary ID	Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.

(MYS) Malaysia

Field or Control	*Description*
Full Time Student - Within Malaysia	Select if the dependent is a full time student in Malaysia.
Full Time Student - Outside Malaysia	Select if the dependent is a full time student outside of Malaysia.

(ARG) Argentina

Field or Control	*Description*
Education Level	Select the dependent's education level. Values are: • *Two Years Old Kindergarten* • *Three Years Old Kindergarten* • *Four Years Old Kindergarten* • *Five Years Old Kindergarten* • *Elementary First Year* • *Elementary Second Year* • *Elementary Third Year* • *Elementary Fourth Year* • *Elementary Fifth Year* • *Elementary Sixth Year* • *Elementary Seventh Year* • *Elementary Eighth Year* • *Elementary Ninth Year* • *Polimodal First Year* • *Polimodal Second Year* • *Polimodal Third Year* • *High School First Year* • *High School Second Year* • *High School Third Year* • *High School Fourth Year* • *High School Fifth Year* • *High School Sixth Year* • *Special Education* Before selecting an education level, make sure that the **Student** field on the same page is selected.

Field or Control	***Description***
School Cert Start Year (school certificate start year)	Select to indicate that the employee has presented the dependent's school certificate for the current year. It is required if the **Certificate Start Year** field has a value.
Certificate Start Year	Enter the 4-digit year of the current year certificate. It is required if the **School Cert Start Year** field is selected.
School Cert End Year (school certificate end year)	Select to indicate that the employee has presented the dependent's school certificate for the previous year. It is required if the **Certificate End Year** field has a value.
Certificate End Year	Enter the 4-digit year of the previous year certificate. It is required if the **School Cert End Year** field is selected.
Eligible for Family Allowance	Select to indicate that the dependent is eligible for family allowance. The dependent must be a child, disabled child, or spouse. An error is displayed if this field is selected, but the relationship to employee specified on this page is *not* one of these values: • Child • Foster Child • Recognized Child • Step Child • Grandchild • Great Grandchild • Spouse

Field or Control	***Description***
Family Allowance Term Date	Enter the end date for the dependent to be eligible for family allowance. The value must be a date that is equal or prior to the dependent's 18th birthday. If a date value is not entered, the system calculates this end date (dependent's 18th birth date) at save time, if the dependent is: • A child (all types), grandchild or great grandchild of the employee. • Single. • Not disabled. The date is recalculated at save time, if a change in the relationship to employee, marital status, or disability status occurs. If a date value is not entered, and the dependent's birth date is not available either, the system doesn't perform the calculation. If the dependent's marital status is changed to a non-single value, the effective date of the row becomes the end date of the family allowance. If the dependent is single and disabled, do not enter an end date.
Income Tax Dependent	Select the type of taxable dependents for income tax. Valid Values are *Child, Other Dependents,* and *Spouse.*
Income Tax Begin Date	Enter the begin date for the dependent to be eligible for income tax.
Income Tax End Date	Enter the end date for the dependent to be eligible for income tax.
Tax Dependent Deduction	Select the percentage that will be able to deduct for the dependent (child). Valid Values are: • 100% (By default 100% is selected.) • 50% **Note:** Tax Dependent Deduction field will be displayed when *Child* is selected in **Income Tax Dependent** field.

Field or Control	*Description*
Social Security Condition	Specify whether the dependent is part of the primary family group or is an adherent of the employee for Social Security benefits.
Social Security Begin Date	Enter the starting date of Social Security benefits for the dependent.
Social Security End Date	Enter the end date of social security benefits for the dependent.
Document Issue Date	Enter the family dependent document issue date. **Note:** To run the Family Dependents text report of the My Simplification program (Global Payroll for Argentina), be sure to enter values in the **Family Dependents Data** grid.
Book	Enter the book information.
Folio	Enter the folio information.
Act Number	Enter the act number.
Birth/Marriage Country, **Birth/Marriage State** and **Birth/ Marriage Location**	Enter the country, state, and location of the dependent's place of birth (for example, if dependent is a child) or marriage (for example, if dependent is a spouse).
Commune	Enter the commune information.
Tribunal	Enter the tribunal information.
Court Number	Select a court number. These numbers are defined on the Court Numbers Page.
Secretary Number	Select a secretary number. These numbers are defined on the Secretary Numbers Page.
School Year	Enter the dependent's school year.
School Type	Enter the type of school that the dependent attends. Valid values are *Summer* and *Normal.*

Field or Control	***Description***
Documentation Code	Select a documentation code.
Overseas Doc Cd (overseas document code)	Select a overseas document code.
DJ Text	Enter the DJ text.

(DEU) Germany

Use the Germany section to enter dependent information that is used for processing family allowances (both marriage-based and child-based).

Field or Control	***Description***
Eligible for Family Allowance	Select to indicate that the dependent (child) is entitled to the child-based family allowance. This option is available for edit if the dependent is listed as a child or grandchild of any kind of the employee.
Number of Child	Enter a number that represents the birth order of the child, *1* for the first child, *2* for the second, and so on.
Additional Social Allowance	Select to indicate that the dependent (child) is entitled to child-related Orts- und Sozialzuschlag. This allowance is applicable to all employees (excluding civil servants and apprentices) meeting the entitlement conditions.
Additional Location Allowance	Select to indicate that the dependent (child) is entitled to location-based allowance.

Field or Control	***Description***
Entitlement Type	Select an applicable entitlement type for the child. Values are: *No Entitlement* *School Education* *Search for Education* *Trainee* *Transition Period* *Under 18 Years* *Unemployed* *Vocational School* *Voluntary Ecological Year* Children under the age of 18, and children between the age of 18 and 25 who are currently attending school or apprenticeship, are entitled to child allowance if the income they receive, if any, doesn't exceed the amount set by the legislation.
Disabled Type and **Handicap Percent**	Select an applicable disability type for the child and associated disability percentage. Disabled children are eligible for continued child allowance regardless of the age limitation. **Note:** This section is available for edit if you select the Disabled field in the Personal History section.
Employer Information	Enter the employer information for the spouse or child, if applicable.

(CAN) Canada

Field or Control	***Description***
Eligible for CSB	If you are entering dependent and beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee who is purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

(BEL) Belgium

Field or Control	***Description***
Fiscally Dependent	Select if the employee is fiscally responsible for the dependent.
Fiscal Situation Spouse	Select the appropriate fiscal situation from the list.
Fiscally Disabled	Select if applicable.
Profession Category Spouse	Select the appropriate category from the list.
Orphan	Select if applicable.
Eligible for Allowance	Select to track whether the dependent is eligible for a (family) allowance. This field is used for data tracking, there is no validation associated to it

(FRA) France

Use this group box to store information that can be passed to your payroll system for payroll processing.

Field or Control	***Description***
Family Supplement	For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the supplemental family allowance.

Field or Control	***Description***
Garnishment	This option is for court orders that require that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that has to be transferred to the relevant government agency in each pay period. Depending on the number of dependents, this amount is reduced. The greater the number of dependents, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the frozen garnishment amount.
AFB Allowance (French Banking Association allowance)	The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
CHIC	CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
Schooling	See **Family Supplement.**
Holiday Premium	See **Family Supplement.**
Status 7 and**Status 8**	Configure these fields to capture additional payroll related status information.
Collective Agmt	Select if applicable.
IJSS Calc. (Indemnités Journalières de Sécurité Sociale)	IJSS is the social security daily allowances. Select if the dependent should be taken into account in the calculation of the employee's entitlement for IJSS. The IJSS is calculated by PeopleSoft Global Payroll for France.

(GBR) United Kingdom

Field or Control	***Description***
Eligible for Parental Leave	Select if the dependent qualifies the employee for parental leave. Select the **Disabled** check box on the top page if it also applies here.
Adopted Dependent	Select if the employee adopted the dependent.
Adoption Date	If adopted, enter the adoption date.
Certificate(s) Verified	Select to indicate that appropriate certificates have been provided to verify this dependent information.

(BRA) Brazil

Field or Control	***Description***
Education Level	Select the education level of the dependent.
Disabled	Select to indicate that the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.
Vaccination Certificate	Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.
Student	Select to indicate that the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.
University or Technical Level	Select to indicate that the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).

Field or Control	***Description***
Termination Cd (termination code)	Enter the reason code for the family allowance termination. Values are: *Child Abandonment:* Abandonment of child. *Dependent exceeds ceiling:* Dependent's age exceeds maximum age. *Court Decision:* Court decision (in case of divorce or separation). *Dependent's Death:* Dependent's death. *End Disability:* Disability ended. *Child Custody:* Custody has been awarded to the other parent. *Termination:* Termination.
Termination Dt (termination date)	Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the **Birth Data** group box. This information is used for reporting purposes.

In the **RG - Additional Data** group box, be sure to enter for this individual the Registro Geral (RG) issuing agency as well as the issued date and issued state, if a national ID is specified in the **National ID** group box with a national ID type of *RG* for the country of Brazil.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the **Vaccination Data** group box. This information is used for reporting purposes.

(USA) US Federal Government

Field or Control	***Description***
FEHB Participant	Enter a value to indicate that the dependent has Federal Employee's Health Benefits (FEHB).

Field or Control	***Description***
Dependent's Fed Plan Type	If the dependent is a FEHB Participant, enter the federal plan type. Valid Values are: • *CHA*: Campus. • *FEH*: FEHB. • *MCA*: Medicare Plan A. • *MCB*: Medicare Plan B. • *OTH*: Other Federal Health Plans.
Medicare Number and **Alternate Medicare Number**	If the dependent is on Medicare, enter their Medicare number (s).
Medicare A Indicator, Medicare B Indicator, and **Medicare D Indicator**	Select if the indicator if the dependent is in a Medicare A, Medicare B, or Medicare D program.
Medicare Reason A, Medicare Reason B, and **Medicare Reason D**	If the dependent is a Medicare recipient, enter the reason they have Medicare A, Medicare B, or Medicare D.

Related Links

PeopleSoft Human Resources Manage Base Benefits

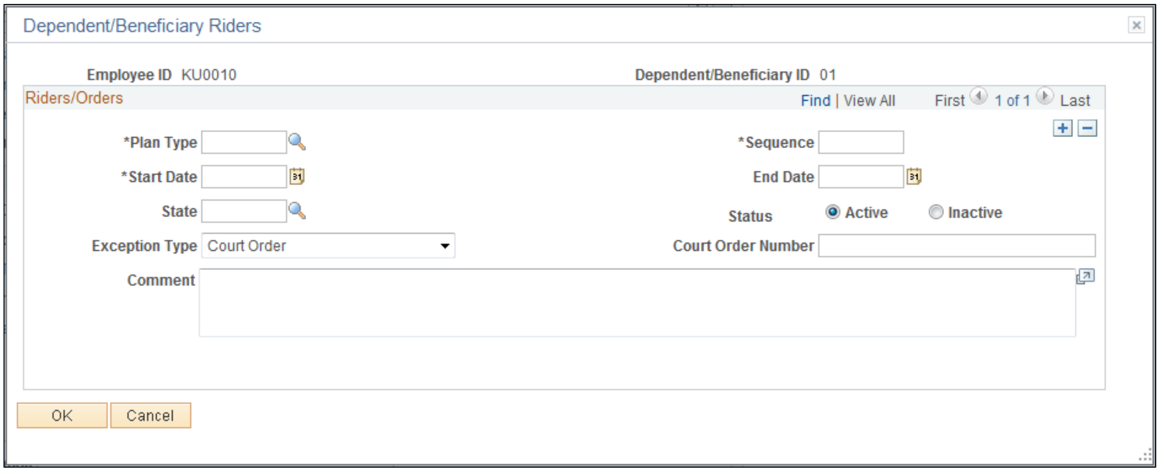
Dependent/Beneficiary Riders Page

Use the Dependent/Beneficiary Riders page (DEPBEN_RIDERS) to enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.

Navigation:

Click the **Riders/Orders** link on the Dependent Information - Personal Profile page.

This example illustrates the fields and controls on the Dependent/Beneficiary Riders page. You can find definitions for the fields and controls later on this page.



The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This page enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system does not complete the enrollment.

Field or Control	***Description***
Plan Type	Enter the type of plan to which the court order relates.
Start Date	Enter the date on which the court order becomes effective.
Sequence	Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of *1*.
Status	Select whether the court order is *Active* or *Inactive.* This field is typically used to void a court order before the end date takes effect. If the status is *Inactive,* the system won't enforce any validations against this court order.
Exception Type	Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.
End Date	Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.
Court Order Number	Enter the official number that is issued by the state for this court order.

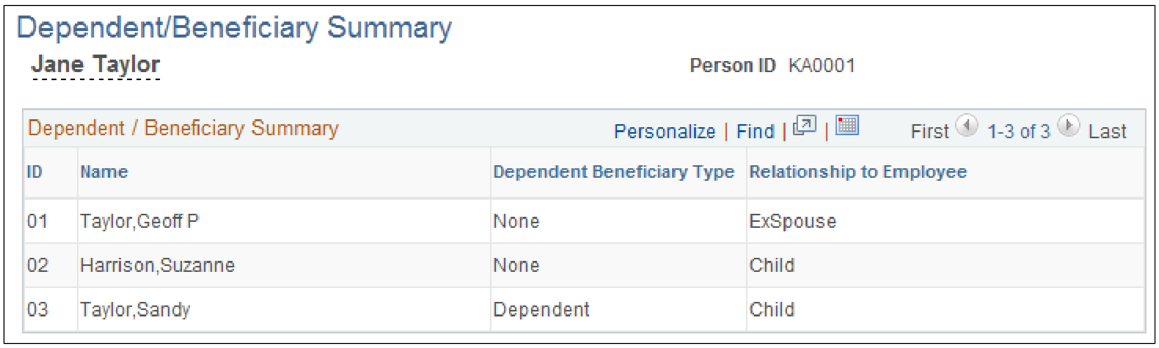
Dependent/Beneficiary Summary Page

Use the Dependent/Beneficiary Summary page (DEPEND_BENEF_SUMM) to view an employee's beneficiaries and dependents.

Navigation:

- **Workforce Administration** > **Benefit Information NLD** > **Review Benefits** > **Dependent/ Beneficiary Summary** > **Dependent/Beneficiary Summary**
- **Benefits** > **Employee/Dependent Information** > **Dependent/Beneficiary Summary** > **Review Dep/Ben Summary** > **Dependent/Beneficiary Summary**

This example illustrates the fields and controls on the Dependent/Beneficiary Summary page. You can find definitions for the fields and controls later on this page.



Dependent/Beneficiary Summary

This group box displays a summary of all dependent and beneficiary data for an employee.

Field or Control	***Description***
ID	This column displays the ID of the dependent or beneficiary.
Name	This column displays the name of the dependent or beneficiary.
Dependent Beneficiary Type	Indicates whether the person is a dependent or beneficiary.
Relationship to Employee	Describes the relationship of the dependents and beneficiaries to the employee.

Note: Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent or beneficiary data by using the Dependent/Beneficiary Data pages, you destroy historical data. When you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

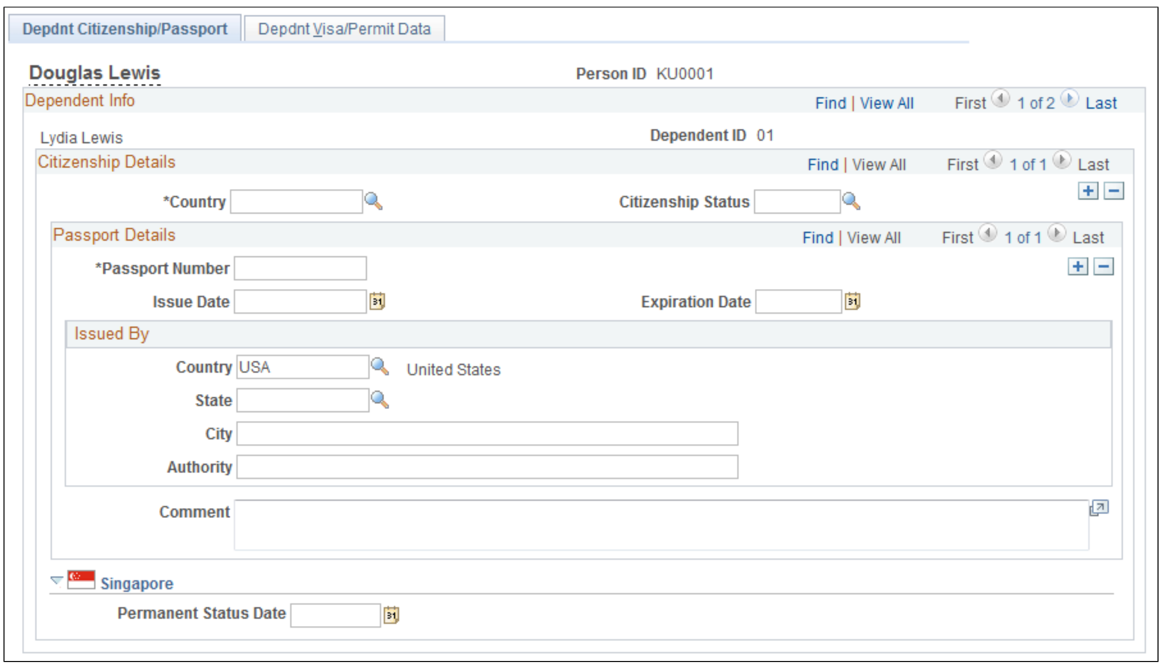
Dependent Identification - Depdnt Citizenship/Passport Page

Use the Dependent Identification - Depdnt Citizenship/Passport page (CITIZEN_PP_DEP) to enter or update dependent citizenship and passport data.

Navigation:

Workforce Administration > **Personal Information** > **Personal Relationships** > **Dependent Identification** > **Depdnt Citizenship/Passport**

This example illustrates the fields and controls on the Dependent Identification - Depdnt Citizenship/Passport page. You can find definitions for the fields and controls later on this page.



Enter information on this page in the same manner that you enter data on the Citizenship/Passport page.

See Citizenship/Passport Page.

Note: (DEU) If you administer a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit table in the Track Global Assignments menu, select *DEU* as the country code from among your valid OECD permit types.

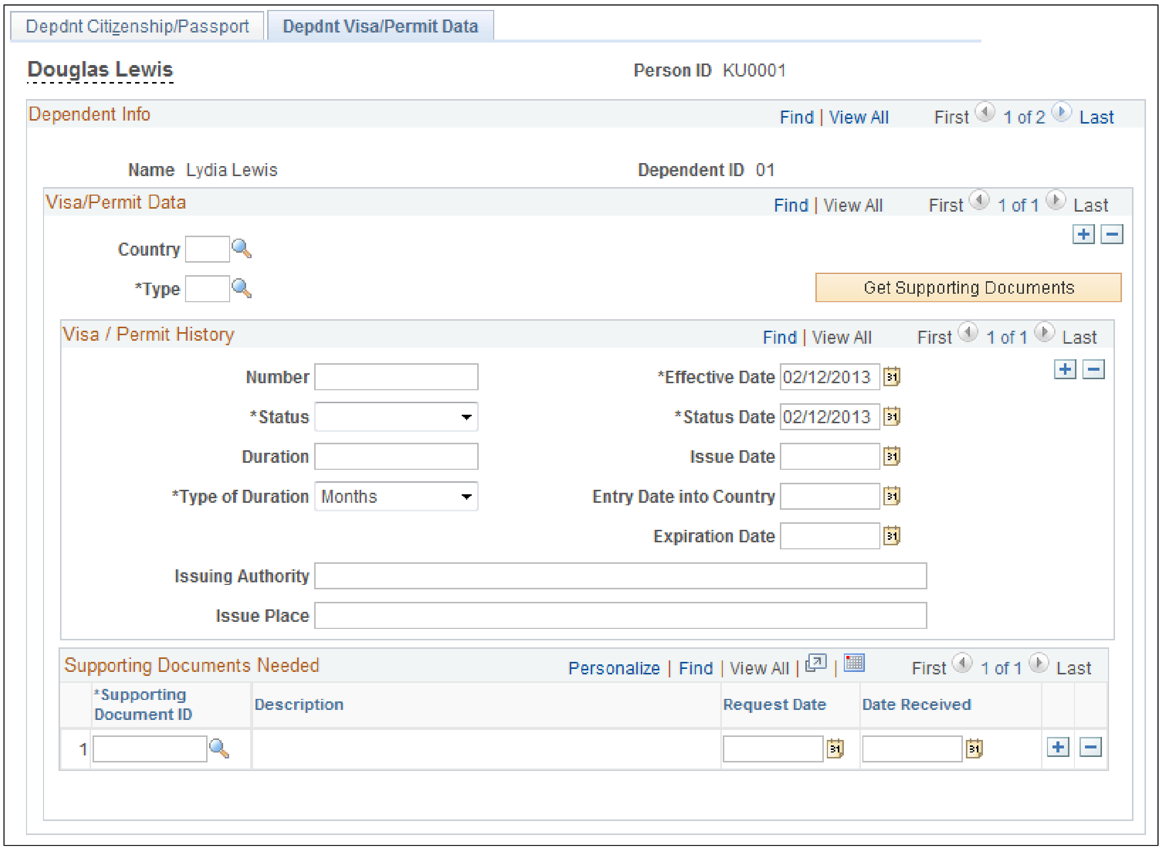
Depdnt Visa/Permit Data Page

Use the Dependent Identification - Depdnt Visa/Permit Data page (VISA_PERMIT_DEP) to enter or update dependent visa and permit data.

Navigation:

Workforce Administration > **Personal Information** > **Dependent Identification** > **Depdnt Visa/ Permit Data**

This example illustrates the fields and controls on the Depdnt Visa/Permit Data page. You can find definitions for the fields and controls later on this page.



Enter information on this page in the same manner that you enter data on the Visa/Permit Data page.

See Visa/Permit Data Page.

Tracking Emergency Contacts

This topic discusses how to enter primary address and phone information for emergency contacts.

Pages Used to Track Emergency Contacts

Page Name	***Definition Name***	***Usage***
Emergency Contact - Contact Address/ Phone Page	EMERGENCY_CONTACT	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.
Other Phone Numbers Page	EMERGENCY_CONTACT2	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.
Emergency Contacts Page	PRCSRUNCNTL	Generate the Emergency Contacts report (PER004). This report lists all contacts on the Emergency Contact table. Run the Refresh Employees Table process before running this report.

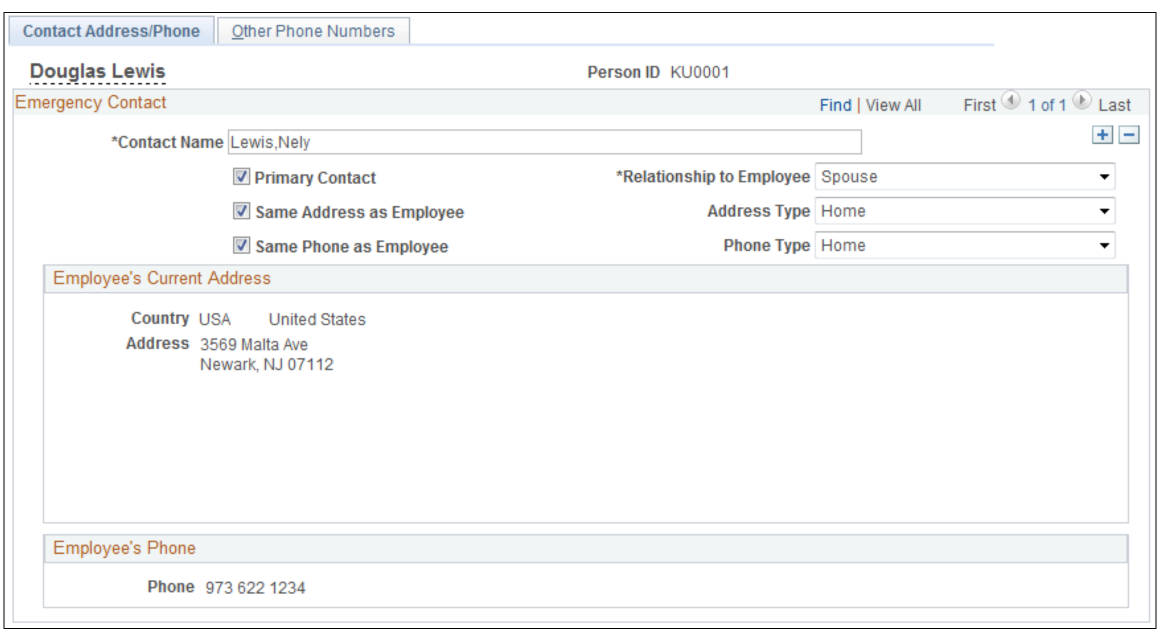
Emergency Contact - Contact Address/Phone Page

Use the Contact Address/Phone page (EMERGENCY_CONTACT) to enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.

Navigation:

Workforce Administration > **Personal Information** > **Personal Relationships** > **Emergency Contact** > **Contact Address/Phone**

This example illustrates the fields and controls on the Contact Address/Phone page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Contact Name	Enter the name of the emergency contact person.
Relationship to Employee	Select the option that indicates the contact's relationship to the worker.
Primary Contact	Select if this is the *first* person whom you should try to contact in an emergency. Select for only one contact.
Same Address as Employee and **Address Type**	Select if the contact has the same address information as the worker, and then select the worker address type that is the same as this contact's. If selected, you don't need to complete any of the address fields.
Same Phone as Employee and **Phone Type**	Select if the contact has the same phone information as the worker, and then select the worker phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the worker but a different phone number.
Change Country	Click to enter or edit the contact's country.
Edit Address	Click to enter or edit the contact's address.
Contact Phone	Enter the contact's phone information.

Related Links

"Administering Country Codes" (Application Fundamentals)

Managing Citizenship and Visa or Permit Information

These topics provide a list of common elements and discuss managing citizenship and visa or permit information.

Pages Used to Manage Citizenship and Visa or Permit Information

Page Name	*Definition Name*	*Usage*
Citizenship/Passport Page	CITIZEN_PASSPORT	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.

Page Name	***Definition Name***	***Usage***
Visa/Permit Data Page	VISA_PERMIT_DATA	Enter an employees visa or permit information.
Passport/Visa Expiration Audit Page	PRCSRUNCNTL	Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.
Citizenship/Country/Visa Audit Page	PRCSRUNCNTL	Generate the Citizenship/Country/Visa Audit report (PER033). This report lists discrepancies between employee citizenship country status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table.

Common Elements Used to Manage Citizenship and Visa or Permit Information

Field or Control	***Description***
Expiration Date	Enter the expiration date of the visa or permit.
Issue Date	Enter the date on which the visa or permit was issued.
Issue Place	Enter the location where the visa or permit was issued.

Citizenship/Passport Page

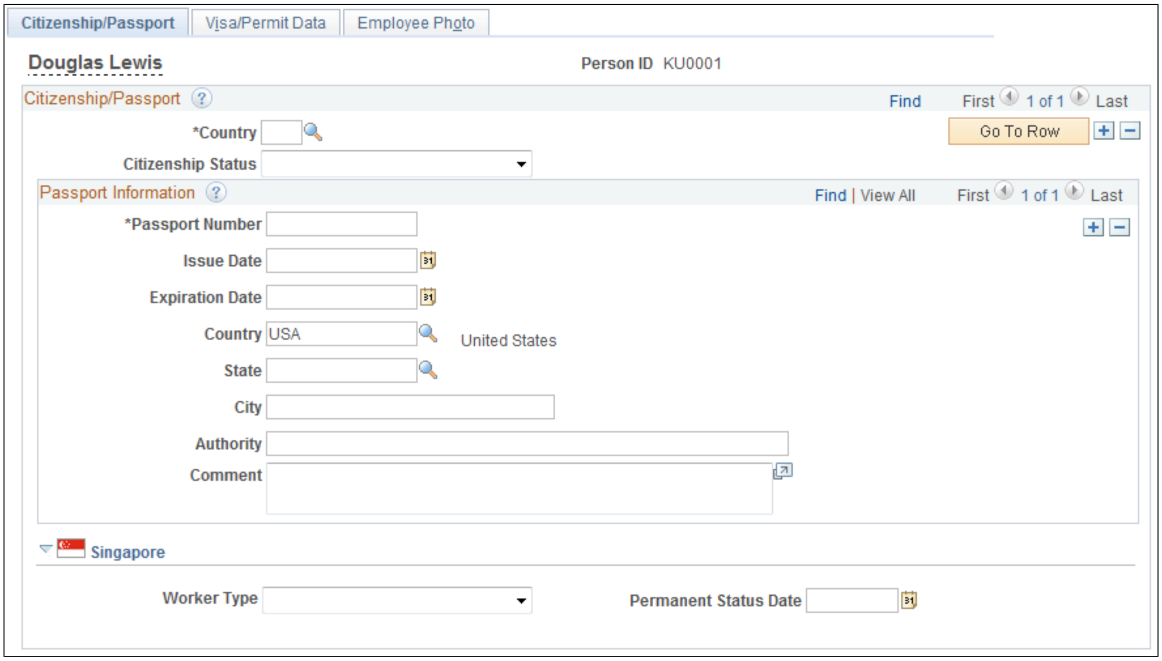
Use the Citizenship/Passport page (CITIZEN_PASSPORT) to track passport and citizenship information for employees.

Enter multiple countries of citizenship and multiple passports for employees and their dependents.

Navigation:

Workforce Administration > **Personal Information** > **Citizenship** > **Identification Data** > **Citizenship/Passport**

This example illustrates the fields and controls on the Citizenship/Passport page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Country	Enter the employee's country of citizenship.
Citizenship Status	Indicate the employee's citizenship status. An employee's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

Note: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information

Field or Control	Description
Passport Number	Enter the passport number.
Country	Enter the originating country for this passport.
Authority	Enter the issuing authority, such as the U.S. Passport Agency.

(SGP) Singapore

Field or Control	***Description***
Worker Type	Select the type of worker for the employee.
Permanent Status Date	Enter the date the employee became a permanent worker for your organization.

Related Links

PeopleSoft Human Resources Track Global Assignments

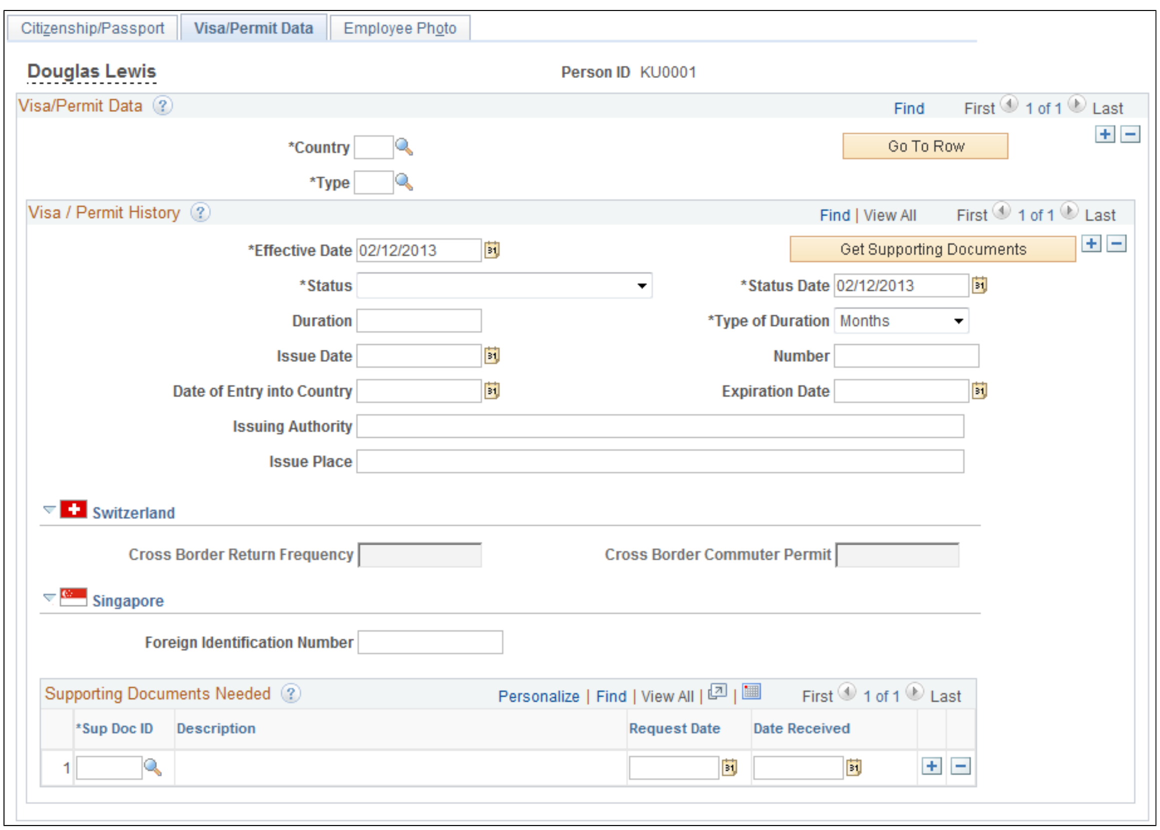
Visa/Permit Data Page

Use the Visa/Permit Data page (VISA_PERMIT_DATA) to enter an employees visa or permit information.

Navigation:

Workforce Administration > **Personal Information** > **Citizenship** > **Identification Data** > **Visa/ Permit Data**

This example illustrates the fields and controls on the Visa/Permit Data page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Type	Select a type of visa or permit. The system prompts you with only types that are associated with the selected country.
Get Supporting Documents	Click to have the system enter a list of the appropriate supporting documents that are needed to obtain the visa or permit type that you entered.
Number	Enter the visa or permit number.
Status	Select the visa or permit status: *Applied, Granted, Renewal in Progress, Cancelled* (for people in Indonesia and Singapore only), and *Renewed.*
Status Date	Enter the date on which the status of the visa or permit changed.
Duration	Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration *(Days, Months,* or *Years)* in the adjacent field.
Date of Entry into Country	Enter the date on which the employee entered the country.
Issuing Authority	Enter the agency that issued the visa or permit, such as the U. S. Department of State or the French Consulate.

(CHE) Switzerland

Field or Control	*Description*
Cross Border Return Frequency	Enter the frequency this employee travels to their home outside of Switzerland: *D*: daily. *W*: weekly. This is a required field when the type of permit is: *G*: Cross Border Commuter. *PG*: Border Crossing Permit.
Cross Border Commuter Permit	Enter the permit number for the Cross Border Commuter Permit.

Note: (DEU) If you're administering a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the country code to select from among your valid OECD permit types.

Supporting Documents Needed

Field or Control	*Description*
Sup Doc ID (supporting document ID)	If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.
Request Date	Enter the date on which the documents were requested.
Date Received	Enter the date on which the documents were received.

Related Links

Nation Duvo Page

(SGP) Managing Citizenship and Worker Type Information

This topic discusses how to manage citizenship and worker type information for employees in Singapore.

Page Used to Manage Citizenship and Worker Type Information

Page Name	*Definition Name*	*Usage*
Identification data SGP Page	CITIZEN_PASSPO_SGP	Enter effective-dated citizenship and worker type information for employees.

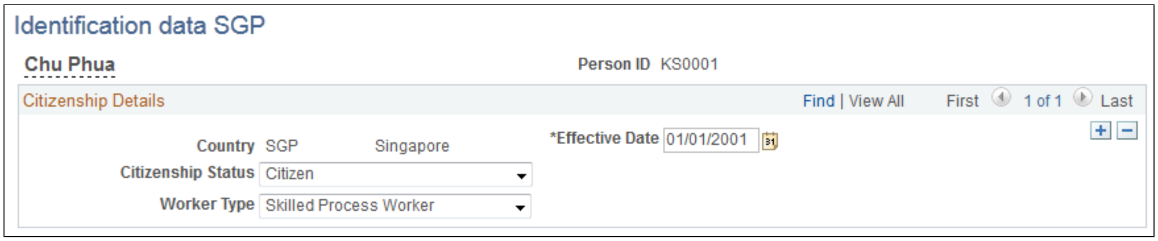
Identification data SGP Page

Use the Identification data SGP page (CITIZEN_PASSPO_SGP) to enter effective-dated citizenship and worker type information for employees.

Navigation:

Workforce Administration > **Personal Information** > **Citizenship** > **Identification Data SGP** > **Identification data SGP**

This example illustrates the fields and controls on the Identification data SGP page.



Use this page to specify the citizenship status and worker type for employees. The information is effective-dated and changes tracked in the system for CPF calculations. For example, where there is a backdated change of foreign worker to permanent resident, CPF has to be calculated from the date the employee became a permanent resident.

Managing Driver's License Information

This topic discusses how to enter license numbers and other driving record information.

Page Used to Manage Driver's License Information

Page Name	***Definition Name***	***Usage***
Driver's License Data Page	DRIVERS_LIC_GBL	Enter license numbers or other data from a worker's driving record.
(BRA) Driver’s License BRA Page	DRIVERS_LIC_BRA	Enter license numbers or other data from a worker's driving record.

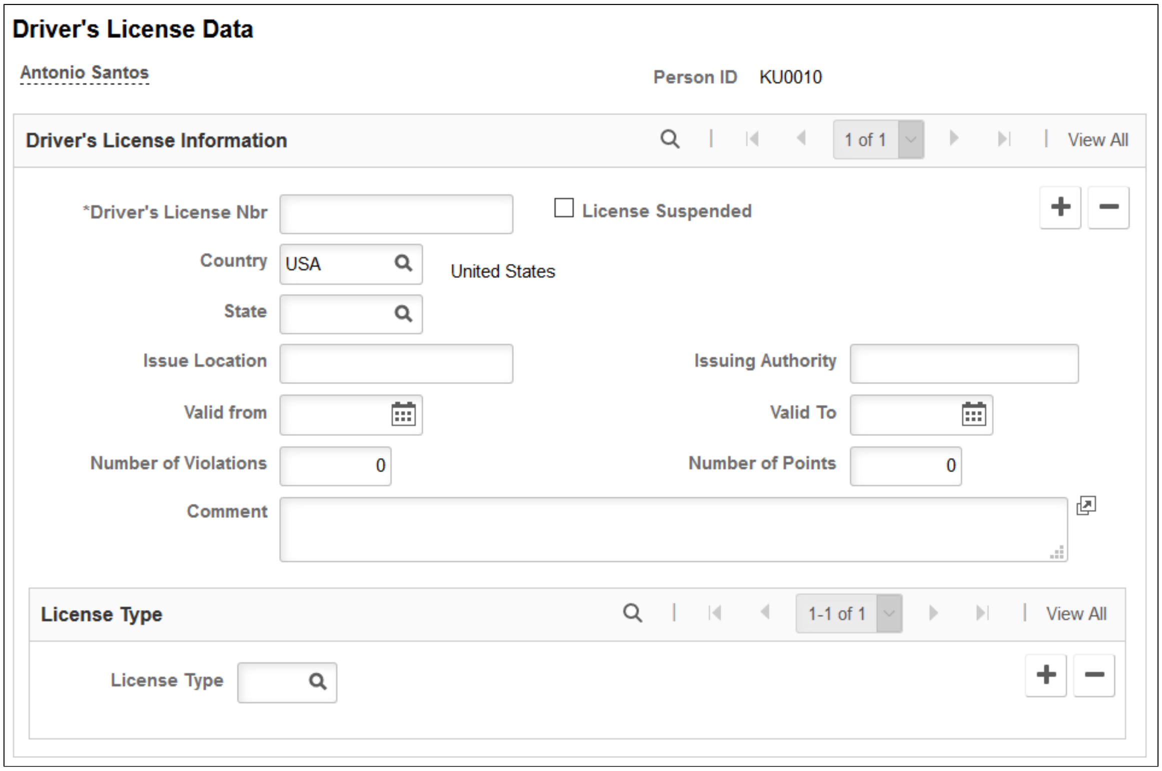
Driver's License Data Page

Use the Driver's License Data page (DRIVERS_LIC_GBL) to enter license numbers or other data from a worker's driving record.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Driver's License Data** > **Driver's License Data**

This example illustrates the fields and controls on the Driver's License Data page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Driver's License Nbr (Driver's License Number)	Enter the license number.
License Suspended	Select if the worker's driver's license is currently suspended.
Issue Location	Enter the location where the license was issued.
Issuing Authority	Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.
Valid from and **Valid To**	Enter the dates on which the driver's license remains valid. The *to* date must be in the future.
Number of Violations	Enter the number of traffic violations cited on the worker's driving record.
Number of Points	Enter the number of points accumulated on the worker's driving record.
License Type	Enter the type of license held by the worker.

If you need to enter more than one driver's license for a worker, add a new data row.

(BRA) Driver's License BRA Page

Use the Driver's License BRA page (DRIVERS_LIC_BRA) to enter license numbers or other data from a worker's driving record.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Driver's License BRA** > **Driver's License BRA**

This page is almost identical to the Driver's License Data Page, except for the field described below.

Field or Control	***Description***
First Issuance Date	Enter the date that the driver's license was first issued. This information is used in eSocial reporting.
Preferred	Select a preferred driver's license type. Select only one preferred license type for each license number.

Entering Bank Account Information

These topics discuss entering bank account information.

Pages Used to Enter Bank Account Information

Page Name	***Definition Name***	***Usage***
Maintain Bank Accounts Page	PYE_BANKACCT	Enter bank account information for a payee. Use this information to track worker direct deposit information.
(GBR) Building Society Details Page	PYE_BS_SP_UK	Enter a person's building society roll number and name. (GBR) For this page to appear, the country code must be *GBR* and the building society ID must have a value.
(MEX) Inter-bank Payment Scheme Page	GPMX_PYE_BANKACCT	(MEX) Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account.
Bank Prenote Information USA Page	GPUS_PRENOTE	Indicate whether prenotification files (used in Federal Schedule Reconciliation) need to be generated.

Page Name	Definition Name	Usage
"Specify Net Pay Elections Page" (PeopleSoft Global Payroll)	GP_NET_DIST	Define how a person's net pay is distributed between the their bank accounts.

Maintain Bank Accounts Page

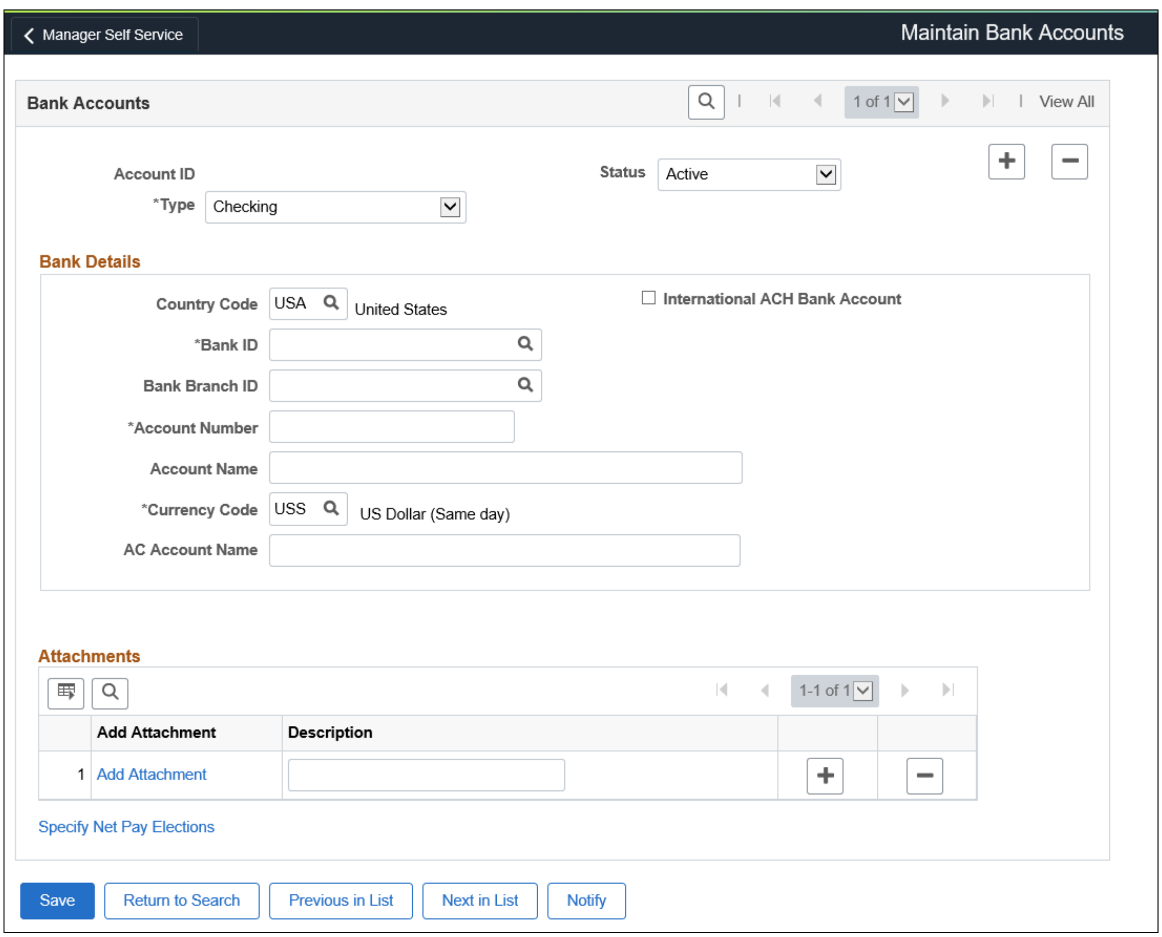
Use the Maintain Bank Accounts page (PYE_BANKACCT) to enter bank account information for a payee.

Use this information to track worker direct deposit information.

Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Maintain Bank Accounts** > **Maintain Bank Accounts**
- **Global Payroll & Absence Mgmt** > **Payee Data** > **Net Pay / Recipient Elections** > **Maintain Bank Accounts** > **Maintain Bank Accounts**

This example illustrates the fields and controls on the Maintain Bank Accounts page. You can find definitions for the fields and controls later on this page.



Note: Before you can enter a person's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Field or Control	Description
Account ID	The system creates an account ID when you enter a new bank or building society account for a person. This field is for information only.
Type	Select the type of account that you are tracking. Options are *Building Society Roll Number, Checking, Current Account, Giro Account, Regular,* and *Savings.*
Country Code	Select the country for the payee's bank account.
International ACH Bank Account (international automatic clearing house bank)	Select to indicate that the bank is located outside the territorial jurisdiction of the United States. **Note:** This field appears only if you have PeopleSoft Payroll for North America or PeopleSoft Global Payroll for United States installed.
Already have an IBAN Number	Select to indicate that the payee has an IBAN. When you select this check box, the **Bank ID, Bank Branch ID,** and **Account Number** fields become display-only and the **IBAN** field and **Validate** button become available. If you deselect this check box for a payee who already has an IBAN entered and validated in the **IBAN** field, the system alerts you that this action will result in clearing the IBAN and bank account detail fields. You can click OK to continue, or Cancel to leave the check box selected. **Note:** This check box appears on this page only when the IBAN Enabled check box is selected and the IBAN Required check box is deselected on the IBAN Country Setup page.
IBAN (International Bank Account Number)	Enter the IBAN for the payee. This field is editable only if you select the **Already have an IBAN Number** check box or if the **IBAN Required** check box is selected on the IBAN Country Setup page. If data encryption is enabled and the encryption process is run for the PYE_BANKACCT record, the IBAN is encrypted in the database if it belongs to a country that is specified on the “Define Country for Encryption Page” (Application Fundamentals). Also, the IBAN appears as masked on this page. An exception to this is when the user is assigned the *Payee Bank Account Admin* role, and this role is defined on the “Grant Unmasked Access Page” (Application Fundamentals) for the PYE_BANKACCT record. In this case, the user sees the unmasked IBAN.

Field or Control	***Description***
Edit IBAN	Select to update the IBAN. This field appears together with the **IBAN** field, when the encryption process is run and the IBAN currently displayed belongs to a country that is specified on the "Define Country for Encryption Page" (Application Fundamentals). When selected, the existing read-only number is cleared from the field for you to enter a new one.
Validate	Click to validate the number entered in the **IBAN** field. The validation process alerts you if there is an error in the entered IBAN. In addition, the validation process populates the **Bank ID, Bank Branch ID,** and **Account Number** fields based on the entered IBAN. This button is available only if you select the **Already have an IBAN Number** check box or if the **IBAN Required** check box is selected on the IBAN Country Setup page.
Bank ID, Bank Branch ID, Account Number and **Check Digit**	When the **Already have an IBAN Number** check box is selected or if the **IBAN Required** check box is selected on the IBAN Country Setup page, these fields are not editable. The system populates them based on the entered IBAN when you click the **Validate** button. **Note:** For German accounts with an IBAN, the **Bank Branch ID** field remains editable. For accounts without an IBAN, manually enter values in the **Bank ID, Bank Branch ID,** and **Account Number** fields. The **Check Digit** field does not appear for these accounts.
Building Society ID	(GBR) If you entered *GBR* in the **Country Code** field, this field replaces the **Bank Branch ID** field. See details below. See Maintain Bank Accounts Page.
Account Number	Enter the account number for the person. If data encryption is enabled and the encryption process is run for the PYE_BANKACCT record, the account number is encrypted in the database if it belongs to a country that is specified on the "Define Country for Encryption Page" (Application Fundamentals). Also, the account number appears as masked on this page. An exception to this is when the user is assigned the *Payee Bank Account Admin* role, and this role is defined on the "Grant Unmasked Access Page" (Application Fundamentals) for the PYE_BANKACCT record. In this case, the user sees the unmasked account number. "Understanding Data Encryption for Global Payroll for United States" (Application Fundamentals).

Field or Control	***Description***
Edit Account Number	Select to update the account number. This field appears together with the Account Number field, when the encryption process is run and the account number currently displayed belongs to a country that is specified on the “Define Country for Encryption Page” (Application Fundamentals). When selected, the existing read-only number is cleared from the field for you to enter a new one.
Account Name	Enter the account name for the person.
Prenote Information	(USA) Click this link to access the Bank Prenote Information USA page.
Currency Code	Select the code of the currency in which the account is maintained. The code you enter in this field is for informational purposes only and is not used by the banking process.
Prenote Information	(USA) Click this link to access the Bank Prenote Information USA page. This link is available only if you select the **Prenote Process Allowed** check box on the Installation Settings USA page.
Other Required Information	(MEX) Click this link to access the Inter-bank Payment Scheme page, where you can enter the Clave Bancaria Estandarizada (CLABE) number. This link is available only for Mexican banks. See (MEX) Inter-bank Payment Scheme Page. (GBR) Click this link to access the Building Society Details page and enter roll information. This link is available only when *GBR* is the country code and a value is entered in the. **Building Society ID** field. See (GBR) Building Society Details Page. (ARG) Click this link to access the Inter-bank Payment Scheme page (PYE_BANKACCT_ARG), where you can enter the La Clave Bancaria Uniforme (CBU) number, which stands for unique bank key and. CBU is a term that is commonly used in Argentina. (NLD) Click this link to access the Additional Information page (PYE_BANKACCT_NLD), where you can enter additional information to include in the person’s payment file. For example, if this bank account is used for mortgage payments, you could use these fields to enter a mortgage reference number.

Field or Control	***Description***
AC Account Name (alternate character account name)	Enter the alternate character account name, if applicable. Appears if you enabled alternate character (AC) functionality in the Org Defaults by Permission Lst component.
Add Attachments	Click Add Attachments link to add any attachments.
Specify Net Pay Elections	Click this link to access the Specify Net Pay Elections page where you can view and update net pay details for the person.

(GBR) Entering Banking Information for UK Workers

UK customers also use this page to record workers' building society account information. When you enter *GBR* in the **Country** field, the **Bank Branch ID** field becomes the **Building Society ID** field.

UK customers who enter details of UK bank and building society accounts should enter the following information in the fields on the Maintain Bank Accounts page:

Field	***UK Bank and Building Society Information***
Type	Select an account type: *Current Account:* Select for a bank account. *Building Society Roll Number:* Select for a building society account. *Savings:* Not applicable to the UK. *Checking:* Not applicable to the UK.
Country Code	Enter *GBR*.
Bank ID	If the worker has a bank account, select the bank branch from the list of branches set up in the Bank table. If the worker has a building society account, leave this field blank.
Building Society ID	If the worker has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes the **Bank ID** field with the bank that handles clearing for the selected building society. If the worker has a bank account, leave this field blank.

Field	***UK Bank and Building Society Information***
Account Number	Enter the worker's bank account number. If you selected a building society in the **Building Society ID** field, the system automatically completes the **Account Number** field with the building society's account at the clearing bank and makes the field display-only. **Note:** To enter the worker's building society account details, click **Other Required Information.**
Account Name	Enter the account name. If you selected a building society in the **Building Society ID** field, the system makes this field display-only. Click **Other Required Information** to display the Building Society Details page where you enter the account name.
Currency Code	The system provides a default value of *GBP* (Pound Sterling). Override this default if necessary.
Other Required Information	Click to display the Building Society Details page, where you enter the worker's building society account details. The system does not display this link if you select a normal bank branch in the **Bank ID** field.

Note: For more information about the account number formats for a country, see the corresponding PeopleSoft Global Payroll local country documentation.

Related Links

"Understanding Bank and Bank Branch Setup" (Application Fundamentals)
"Managing the Prenotification Process" (PeopleSoft Global Payroll for United States)
"Understanding Banking" (PeopleSoft Global Payroll)

(GBR) Building Society Details Page

Use the Building Society Details page (PYE_BS_SP_UK), for those with the GBR country code and a value in the building society ID, to enter a person's building society roll number and name.

Navigation:

Click the **Other Required Information** link on the Maintain Bank Accounts page.

This example illustrates the fields and controls on the Building Society Details page. You can find definitions for the fields and controls later on this page.

When you select a building society ID, the **Other Required Information** link appears on the page.

Field or Control	***Description***
Roll Name	Enter the roll name of the worker's building society account.
Roll Number	Enter the worker's building society account number.

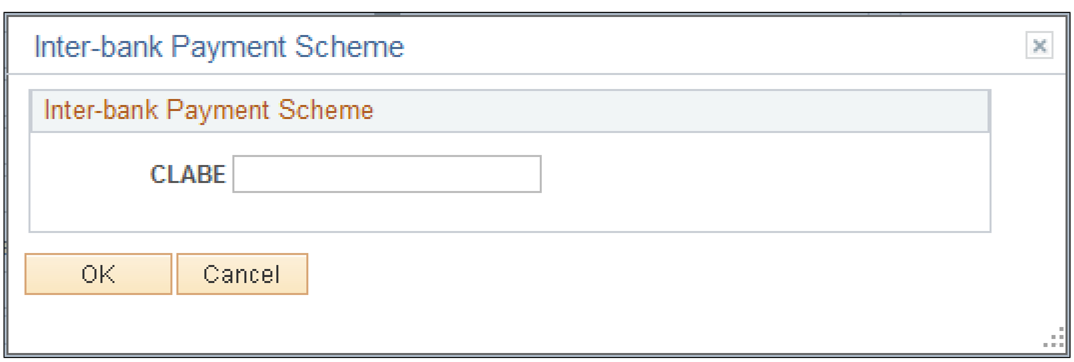
(MEX) Inter-bank Payment Scheme Page

Use the Inter-bank Payment Scheme page (GPMX_PYE_BANKACCT) to enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account.

Navigation:

Click the **Other Required Information** link on the Maintain Bank Accounts page.

This example illustrates the fields and controls on the Inter-bank Payment Scheme page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
CLABE	Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account. The CLABE number is a numeric 18-digit standardized bank code for domestic Inter-bank fund transfers.

Tracking Volunteer Activity

This topic discusses how to enter information on worker volunteer activities.

Page Used to Track Volunteer Activity

Page Name	***Definition Name***	***Usage***
Volunteer Activities Page	VOLUNTEER_ACTIVITY	Enter information on worker volunteer activities. Track multiple volunteer organizations for workers and multiple start dates with the same organization.

Volunteer Activities Page

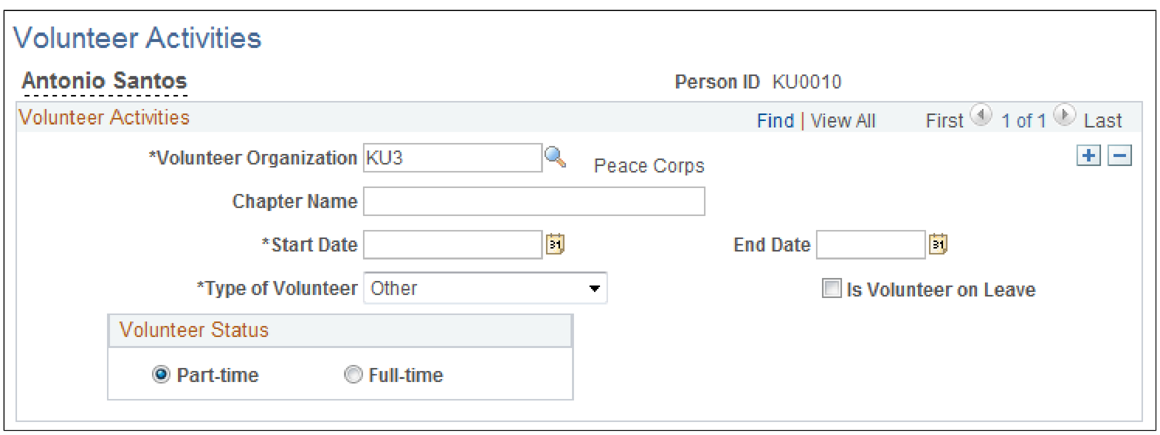
Use the Volunteer Activities page (VOLUNTEER_ACTIVITY) to enter information on worker volunteer activities.

Track multiple volunteer organizations for workers and multiple start dates with the same organization.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Volunteer Activities** > **Volunteer Activities**

This example illustrates the fields and controls on the Volunteer Activities page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Volunteer Organization	Select a volunteer organization code.
Chapter Name	Enter the chapter name of the organizations in which the employee volunteers, if applicable.

Field or Control	*Description*
Start Date and**End Date**	Enter the start and end date of the worker participation.
Type of Volunteer	Select the type of volunteer activity in which the worker is participating: *Administr, Canvasser, Executive, Fund Raise,* or *Other.*
Is Volunteer on Leave	Select if the volunteer is on leave. **Note:** This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.
Volunteer Status	Select either *Part Time* or *Full Time* to indicate the volunteer status.

Note: This information is useful when you need to track workers' additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

Entering and Tracking Additional Workforce Data

These topics discuss entering and tracking additional workforce data.

Pages Used to Enter and Track Additional Workforce Data

Page Name	*Definition Name*	*Usage*
Badge Page	BADGE	Record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.
Employee business expenses Page	BUSINESS_EXPENSES	Track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.
Prior Work Experience Page	PRIOR_WORK_EXPER	Track prior work experience. Enter the details of a worker's previous employers and jobs.
Employee Photo Page	EMPLOYEE_PHOTO	Enter a worker image into the system by copying and pasting images into image fields.

Page Name	***Definition Name***	***Usage***
Personal Information Comments Page	GENL_COMMENTS	Enter a miscellaneous comment about a worker.

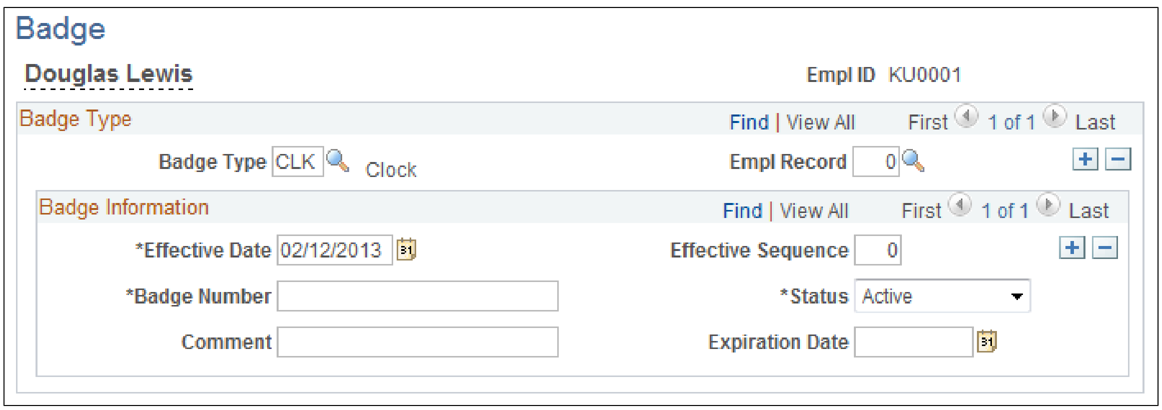
Badge Page

Use the Badge page (BADGE) to record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.

Navigation:

Workforce Administration > **Personal Information** > **Badge**

This example illustrates the fields and controls on the Badge page. You can find definitions for the fields and controls later on this page.



You must have previously entered Badge Type data on the Translate table before using this page.

Field or Control	***Description***
Badge Type	Select the type of badge number that you want to enter: *BA* (Building Access). *CCA* (Computer Center Access). *CLK* (Clock). *GB* (General Badge). *PA* (Parking Access). Add more values if you want or enter more than one badge type for a particular worker and employment record number.

Field or Control	Description
Badge Number	Enter the badge number that corresponds to the badge type that you selected. The system ensures that the number that you enter isn't currently assigned to another worker. It also ensures that the number hasn't been assigned for future use by someone else. For each badge type, only one badge number per worker can be active at the same time. For example, a worker can have a row for a *Building Access* badge type and another row for a *Parking Access* type, but the component does not allow you to enter two rows for the same badge type, such as two *Building Access* type rows. Badge numbers can be reused. If a combination of badge type and badge number was previously assigned to a worker, but is currently inactive and hasn't been assigned for future use, you can use it for a different worker and employment record number. See Expiration Notification Page.
Expiration Date	Include the expiration date, if the badge expires.

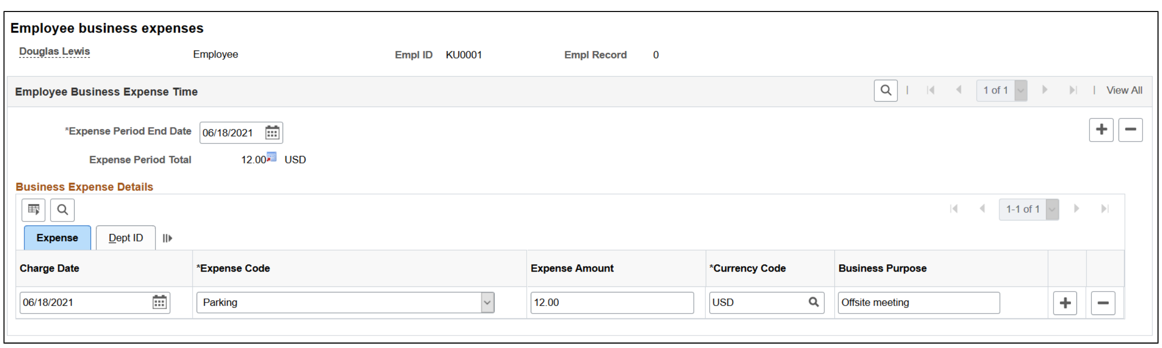
Employee business expenses Page

Use the Employee business expenses page (BUSINESS_EXPENSES) to track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.

Navigation:

Workforce Administration > **Job Information** > **Employee business expenses**

This example illustrates the fields and controls on the Employee business Expenses page - Expense tab. You can find definitions for the fields and controls later on this page.



Before you can track a worker's business expenses, you must set up:

- Valid expense codes on the Translate table.
- User IDs on the Primary Permission List Preferences table.
- Currency codes on the Currency Code table.

- Departments on the Department table.

Field or Control	*Description*
Expense Period End Date	Enter the expense period end date for the period to which these expenses apply.
Charge Date	Enter the date of the actual expense charge.
Expense Code	Select an expense code, such as *Airfare,* for the charge.

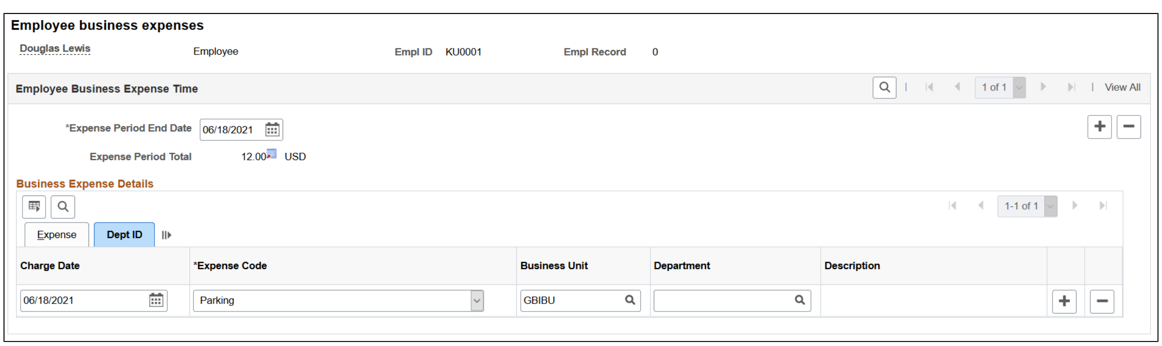
Expense Tab

Field or Control	*Description*
Expense Amount	Enter the amount of the expense.
Currency Code	The currency that is specified for your user ID on the Primary Permissions List Preferences table appears by default. If there is no **To Currency** for your user ID, then the system uses the base currency that you specified for your implementation on the Installation table. Override the default currency if necessary by using the values in the Currency Code table.

Dept ID Tab

Select the Dept ID tab.

This example illustrates the fields and controls on the Business Expenses page - Dept ID tab. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Business Unit	Enter the business unit to which the expense should be charged.

Field or Control	***Description***
Department	Select the specific department to which the expense should be charged.

Warning! The information that you enter here isn't related to PeopleSoft Payroll for North America processing of business expenses.

Prior Work Experience Page

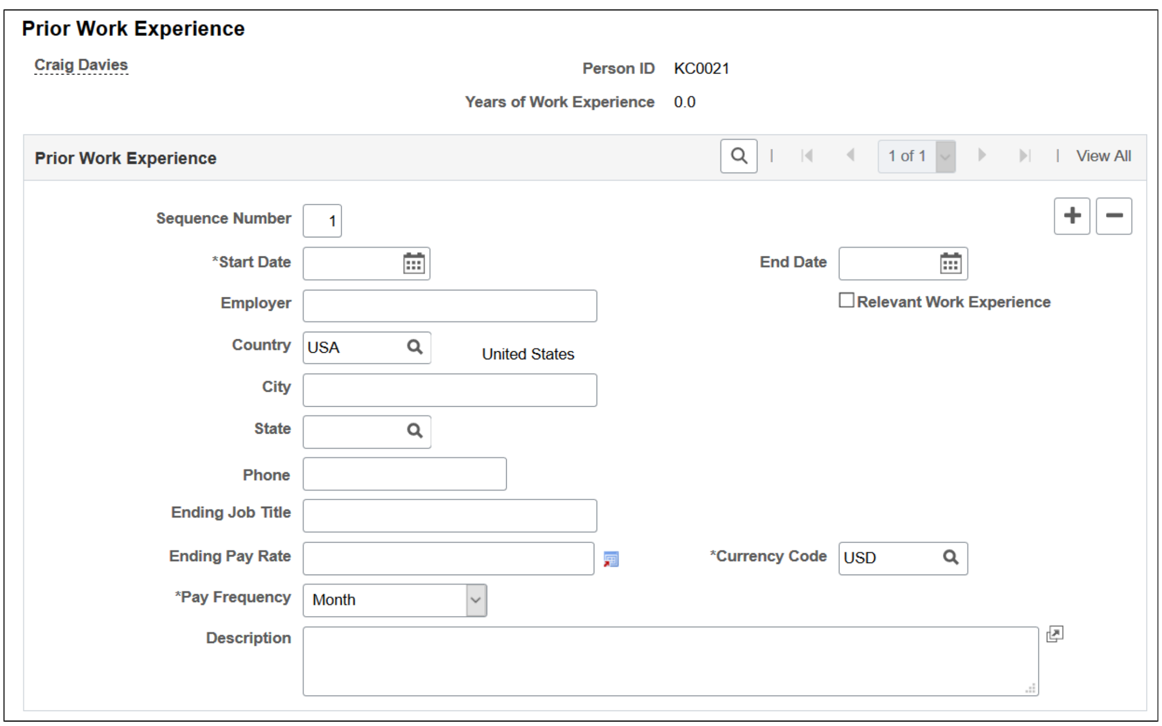
Use the Prior Work Experience page or Person Prior Work Experience page (PRIOR_WORK_EXPER) to track prior work experience.

Enter the details of a worker's previous employers and jobs.

Navigation:

- **Workforce Administration** > **Personal Information** > **Biographical** > **Person Prior Work Experience**
- **Workforce Development** > **Career Planning** > **Manage Person Profiles** > **Prior Work Experience**

This example illustrates the fields and controls on the Prior Work Experience page. You can find definitions for the fields and controls later on this page.



The page layouts of the Prior Work Experience page and Person Prior Work Experience page are identical.

If you've tracked an applicant through the Recruiting business process in PeopleSoft Human Resources, the information that you entered for an applicant becomes part of the employee record when you hire the person. For other workers, entering prior work experience information helps you establish a complete profile for reporting purposes. It's also useful for career and succession planning.

Field or Control	***Description***
Years of Work Experience	The system calculates this value if you select the **Relevant Work Experience** check box. If so, you must enter a start date and end date.
Sequence Number	Enter a sequence number for each prior work experience record.
Start Date and **End Date**	Enter the beginning and end of the worker's tenure with the employer.
Relevant Work Experience	Select if the experience was relevant to the worker's responsibilities with your organization.
Employer	Enter the name of the worker's previous employer.
Ending Job Title	Enter the title in which the worker ended employment.
Ending Pay Rate	Enter the pay rate at which the worker ended employment.
Pay Frequency	The pay **Frequency** field contains a default value of *Month,* which you can change if the pay amount reflects a different frequency.

Related Links

PeopleSoft Human Resources Plan Careers and Successions
“Understanding Third Party Integrations” (PeopleSoft Talent Acquisition Manager)
“Basic PeopleSoft HCM Reports: A to Z” (Application Fundamentals)

Employee Photo Page

Use the Employee Photo page (EMPLOYEE_PHOTO) to enter a worker image into the system by copying and pasting images into image fields.

Navigation:

Workforce Administration > **Personal Information** > **Citizenship** > **Identification Data** > **Employee Photo**

Click **Add Photo Button** to access the File Attachment page where you can browse to and upload an image (such as an employee photograph) to the Employee Photo page. Files size is determine by the **Maximum Upload Size in KB** value on the “HCM Options Page” (Application Fundamentals).

To delete an uploaded image, click **Delete Photo Button** or upload another image to overwrite the existing one.

Only one image per employee is allowed.

Note: Full imaging capabilities may not be supported on all database platforms.

Administrators also have the capability to resize or mass upload employee photos from a source file. For more information on this, see the “Resize Employee Photos Page” (Application Fundamentals) documentation.

For more information, see product documentation for *PeopleTools: Application Designer Developer's Guide*

Setting Up and Tracking Security Clearance and Badge Access

These topics provide an overview of security clearance and badge access and discuss tracking security clearance and badge access.

Pages Used to Track Security Clearance and Badge Access

Page Name	***Definition Name***	***Usage***
Security Clearance Page	HR_EE_SEC_CLR	Select the security clearance type and information for a selected individual.
Badge History Page	HR_EE_BADGE_HIST	View the complete history of a selected individual's badges.
Clearance History Page	HR_EE_SEC_CLR_HIST	View the complete history of a selected individual's security clearances.
Email History Page	HR_EE_EMAIL_HIST	Show a selected individual's most recent email address.
Expiration Notification Page	RC_EE_EXPIR_NOTIF	Set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.
Expiration Inquiry Page	HR_EE_EXPIR_INQ	Search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

Understanding Security Clearance and Badge Access

PeopleSoft provides the capability to track the security status of employees, contingent workers, and persons of interest and revoke their access levels and badges should be revoked. Using this feature, the system notifies security clearance administrators when the security status or badge clearance has expired.

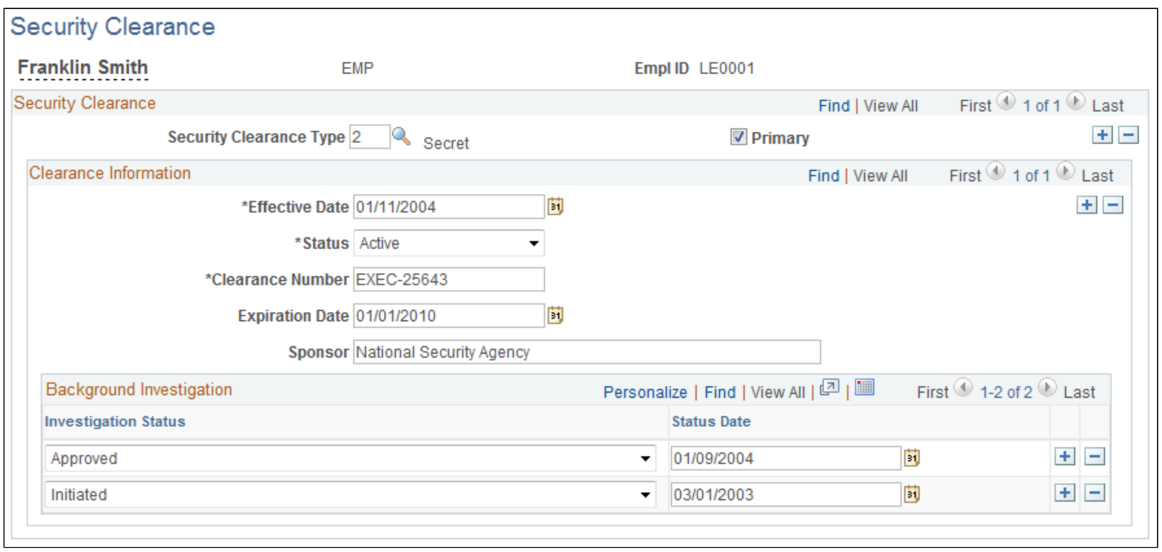
Security Clearance Page

Use the Security Clearance page (HR_EE_SEC_CLR) to select the security clearance type and information for a selected individual.

Navigation:

Workforce Administration > **Personal Information** > **Security Clearance**

This example illustrates the fields and controls on the Security Clearance page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Security Clearance Type	Select the security clearance type. Individuals can have more than one security clearance type. Security clearance type values are determined on the Security Clearance Type page.
Primary	Select to determine the primary security clearance type if an individual has more than one security clearance type.
Effective Date	Displays the date the individual's security clearance was granted.
Status	Specify whether this security clearance is *Active* or *Inactive.*

Field or Control	*Description*
Clearance Number	Enter the number associated with the clearance assignment.
Expiration Date	Select the expiration date of the security clearance.
Sponsor	Enter the sponsor who granted the security clearance. This can be the individual's current or previous agency, or an entirely separate agency. Each security clearance can have only one sponsor.

Background Investigations

Field or Control	*Description*
Investigation Status	Track the status changes in the investigation process associated with getting the security clearance. There is no default for this field. Values include *Approved, Denied, In Progress,* or *Initiated.*
Status Date	Select the date that the investigation status changes.

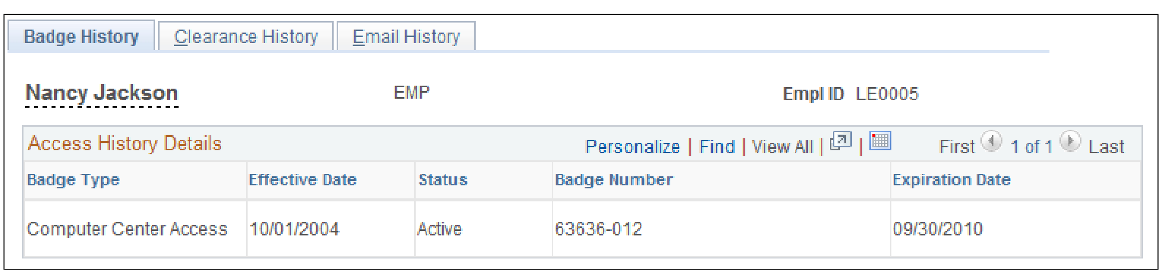
Badge History Page

Use the Badge History page (HR_EE_BADGE_HIST) to view the complete history of a selected individual's badges.

Navigation:

Workforce Administration > **Personal Information** > **Badge/Clearance Access Summary** > **Badge History**

This example illustrates the fields and controls on the Badge History page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Badge Type	Displays the badge type held by the individual. Badge types are defined using the PeopleTools Translate Values component (PSXLATMAINT). See *PeopleTools: PeopleSoft Application Designer.*
Effective Date	Displays the date the individual's badge was issued.
Status	Displays whether the badge is *Active* or *Inactive.*
Badge Number	Displays the badge number. Badge numbers are determined on the Badge page.
Expiration Date	Display the badge expiration date.

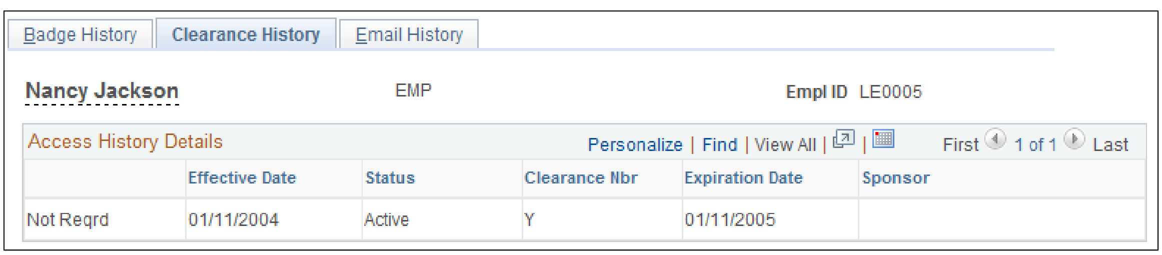
Clearance History Page

Use the Clearance History page (HR_EE_SEC_CLR_HIST) to view the complete history of a selected individual's security clearances.

Navigation:

Workforce Administration > **Personal Information** > **Badge/Clearance Access Summary** > **Clearance History**

This example illustrates the fields and controls on the Clearance History page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Clearance Type	Displays the history of security clearance types held by the individual. Security clearance types are determined on the Security Clearance page.
Effective Date	Display the grant date for the individual's security clearance.

Field or Control	***Description***
Status	Displays whether the security clearance is *Active* or *Inactive*.
Clearance Nbr	Displays the number associated with the security clearance assignment.
Expiration Date	Displays the security clearance expiration date.
Sponsor	Identifies the sponsor who granted the security clearance.

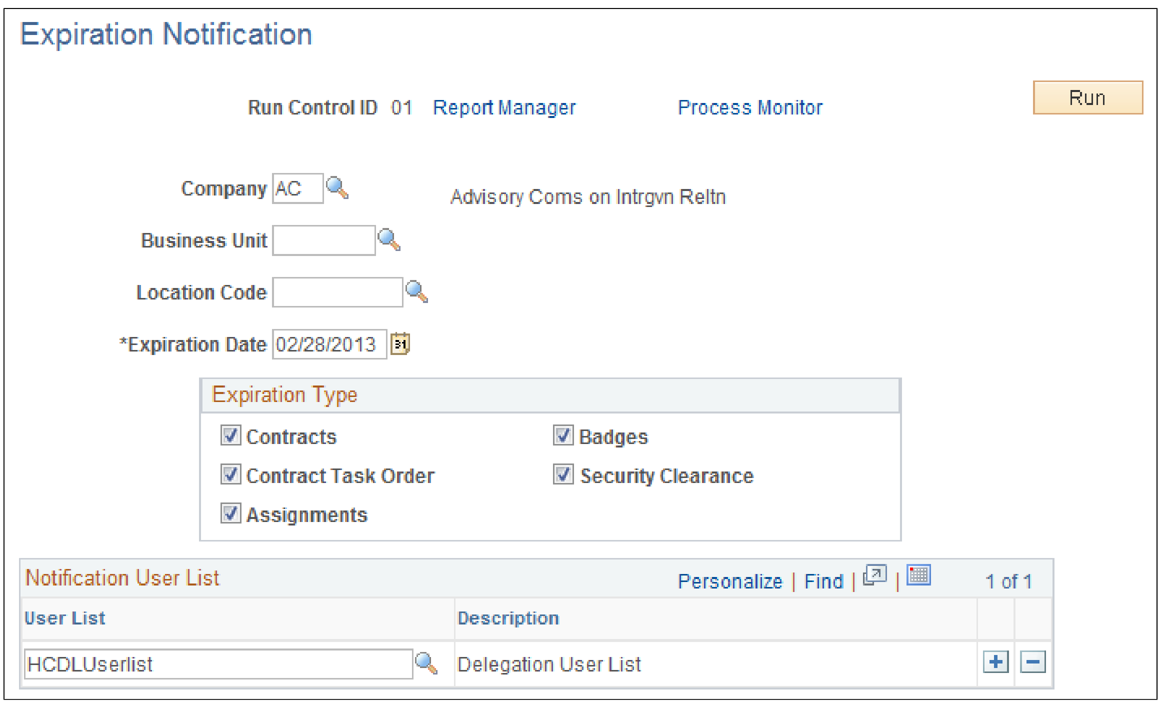
Expiration Notification Page

Use the Expiration Notification page (RC_EE_EXPIR_NOTIF) to set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

Navigation:

Workforce Administration > **Personal Information** > **Expiration Notification**

This example illustrates the fields and controls on the Expiration Notification page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Company	Select the company for which to generate the notification.

Field or Control	***Description***
Expiration Date	Select the date of expiration for which your company wants to notify managers of expiration types. Any people with expiring expiration types on or before this date will be returned.
Expiration Type	Select the type of expiration for which to generate notification.
User List	Select the users who will be notified of impending expiration.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

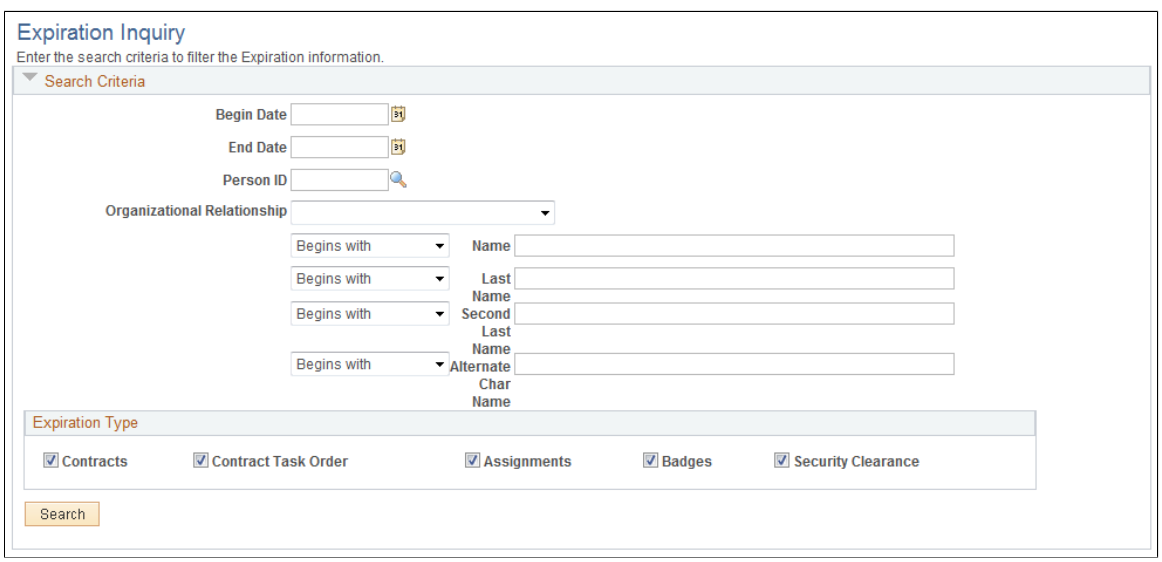
Expiration Inquiry Page

Use the Expiration Inquiry page (HR_EE_EXPIR_INQ) to search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

Navigation:

Workforce Administration > **Personal Information** > **Expiration Inquiry**

This example illustrates the fields and controls on the Expiration Inquiry page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Begin Date and**End Date**	Select the date range for which to search for pending expirations.
Person ID	Select a person ID to limit the search to the selected person.
Org Relation (organizational relationship)	Select the limit the search to a *Contingent Worker, Employee,* or *Person of Interest.*
Name, Last Name, Second Name, and **Alternate Char Name** (alternate character name)	Enter a value to search for a particular person.
Expiration Type	Select the type of expiration for which to search.
Search	Select the **Search** button to begin the search for pending expirations.

Chapter 17

Managing Country-Specific Workforce Data

(ARG) Providing Additional Information for Argentinean Employees

These topics discuss providing additional information for Argentinean employees.

Pages Used to Provide Additional Information for Argentinean Employees

Page Name	***Definition Name***	***Usage***
Additional Information ARG Page	ADDL_INFO_ARG	Enter additional employee information.
Health Benefits Page	ADDL_HB_ARG	Declare the Social Security Plan and health provider data for each employee.
SICOSS Page	ADDL_SIJP_ARG	Manage the Integral Retirement and Pension System data required by the government of Argentina.

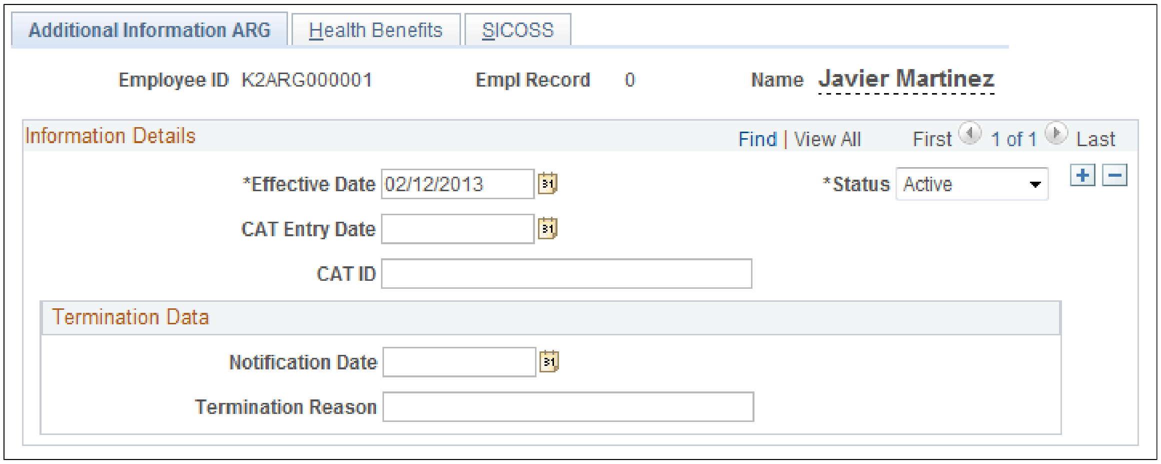
Additional Information ARG Page

Use the Additional Information ARG page (ADDL_INFO_ARG) to enter additional employee information.

Navigation:

Workforce Administration > **Job Information** > **Additional Information ARG** > **Additional Information ARG**

This example illustrates the fields and controls on the Additional Information ARG page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
CAT Entry Date (Clave Alta Temprana Entry Date)	Enter the date that the early registration code was assigned to the employee.
CAT ID (Clave Alta Temprana ID)	Enter the early registration code requested by the employer.
Notification Date and **Termination Reason**	Enter the termination notification date and reason for the employee if applicable. GP for Argentina captures this information in the Working Relationship text file of the My Simplification (GPAR_MYSIMP) report. See Also "Global Payroll for Argentina Reports: A to Z" (PeopleSoft Global Payroll for Argentina)

Health Benefits Page

Use the Health Benefits page (ADDL_HB_ARG) to declare the Social Security Plan and health provider data for each employee.

Navigation:

Workforce Administration > **Job Information** > **Additional Information ARG** > **Health Benefits**

This example illustrates the fields and controls on the Health Benefits page. You can find definitions for the fields and controls later on this page.

Social Security Plan

Field or Control	*Description*
Social Security Code	Select the code for the employee's Social Security entity.
Social Security Plan Code	Select the plan code for the employee's Social Security entity.
SS Affiliate Number (Social Security Affiliate Number)	Enter the employee's identification number for the Social Security entity.
SS Card Expiration Date (Social Security Card Expiration Date)	Enter the expiration date of the employee's Social Security card.

Health Provider Plan

Field or Control	*Description*
Health Provider Code	Select the code for the employee's health provider entity.
Health Provider Plan Code	Select the code for the employee's health provider plan.

Field or Control	***Description***
HP Affiliate Number (Health Provider Affiliate Number)	Enter the employee's identification number for the health provider entity.
HP Card Expiration Date (Health Provider Card Expiration Date)	Enter the expiration date for the employee's health provider card.

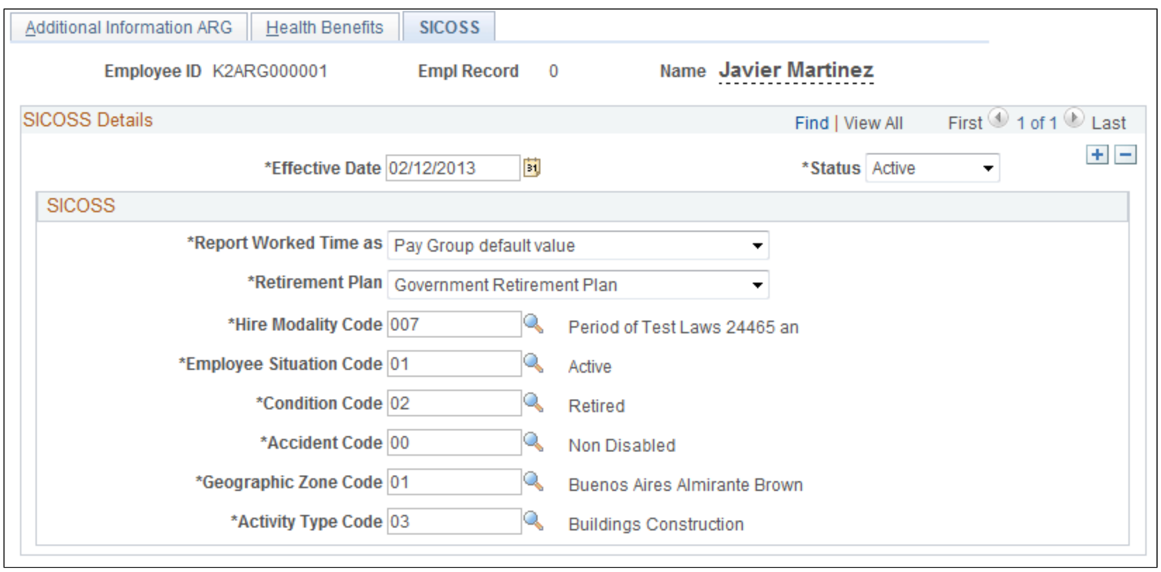
SICOSS Page

Use the SICOSS page (ADDL_SIJP_ARG) to manage the Integral Retirement and Pension System data required by the government of Argentina.

Navigation:

Workforce Administration > **Job Information** > **Additional Information ARG** > **SICOSS**

This example illustrates the fields and controls on the SICOSS page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Report Worked Time as	Select how to report worked time. The default value, *Pay Group default value,* reports worked time based on the pay group. You can override the value set by the pay group for this employee. Select *Days* to report the amount of worked days in the month, or select *Hours* to report the amount of hours worked in the month.

Field or Control	Description
Retirement Plan	Select the employee's retirement plan. The default value is *Government Retirement Plan.* *Corporate Retirement Plan* is available for selection only when the effective date is before January 1, 2009.
AFJP Code (Administratoras de Fondos de Jubilaciones y Pensiones Code)	Select the employee's AFJP code. This field is displayed only when the value in the Retirement Plan field is *Corporate Retirement Plan.* This is possible only when the effective date is before January 2, 2009.
Hire Modality Code	Select the employee's Hire Modality Code value.
Employee Situation Code	Select the employee's Employee Situation Code value.
Condition Code	Select the employee's Condition Code value.
Accident Code	Select the Accident Code value.
Geographic Zone Code	Select the Geographic Zone Code.
Activity Type Code	Select the corresponding Activity Type Code.

(BRA) Providing Additional Information for Brazilian Employees

These topics discuss providing additional information for Brazilian employees.

Pages Used to Enter Additional Data for Brazilian Employees

Page Name	Definition Name	Usage
(BRA) Personal Information BRA Page	PERSONAL_INFO_BRA	Enter additional information about a person for Brazil.
(BRA) Tax Exemption BRA Page	TAX_INFORM_BRA	Manage tax exemption information for employees.
(BRA) Tax Not Withheld BRA Page	TX_NO_WITHHELD_BRA	Enter information regarding non-withholding of taxes or judicial deposits for employees.

Page Name	***Definition Name***	***Usage***
(BRA) Suspended Deductions BRA Page	SUSP_DED_TXNW_BRA	Enter details for deductions with suspended liability.
(BRA) Additional Information BRA Page	ADDL_INFO_BRA	Enter additional worker information.
(BRA) National ID History Page	PERS_NID_HI_BRA	Enter the effective dated national ID. This information is used in SEFIP reporting.
(BRA) Additional Contract Data Page	CONTRCT_DTA_BRA	Specify the first and second contract periods for the employee who has an active contract.
(BRA) Training/Capacity Building BRA Page	EMPL_SPEC_TRAI_BRA	List special training completed by employees.
(BRA) Apprentice BRA Page	APPRENTICE_BRA	Manage apprentice contract information.

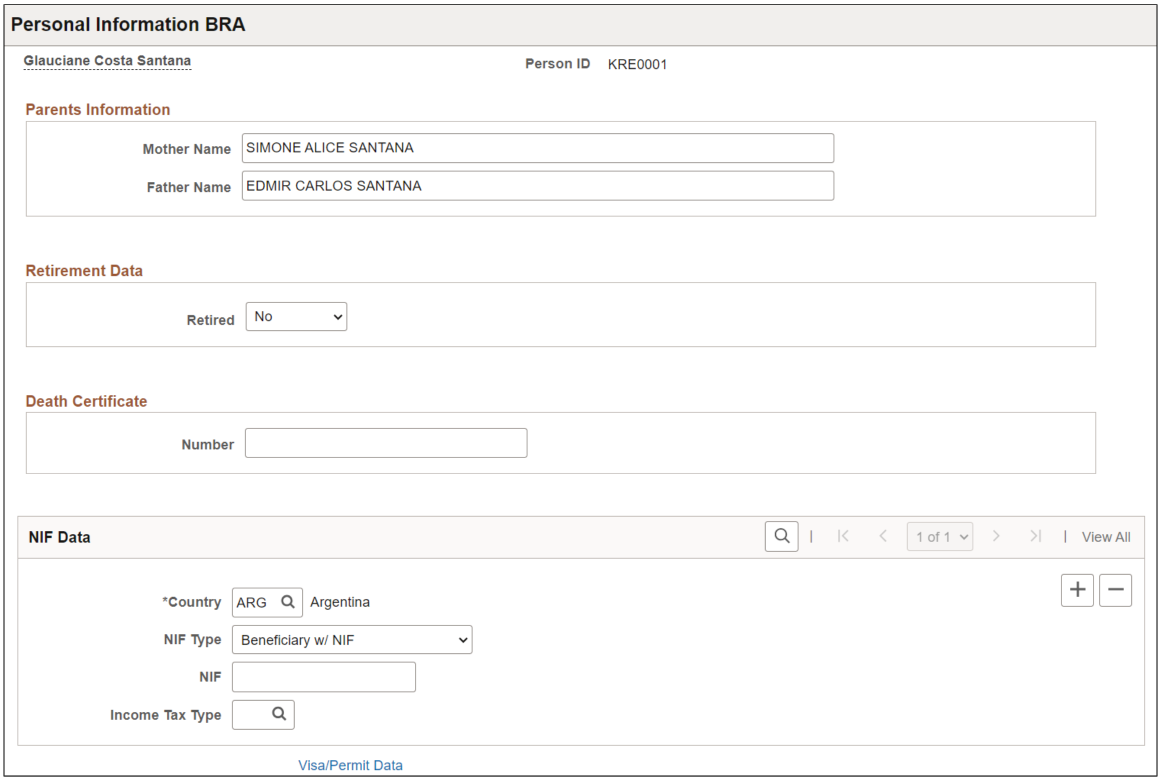
(BRA) Personal Information BRA Page

Use the Personal Information BRA page (PERSONAL_INFO_BRA) to enter additional information about a person for Brazil.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Personal Information BRA** > **Personal Information BRA**

This example illustrates the fields and controls on the Personal Information BRA page.



Use this page to enter additional personal information, such as parental information, retirement data, death certificate number, NIF (foreign tax identification) data, and tax exemption information. Information entered in this section is used in eSocial reporting.

Retirement Data

Field or Control	***Description***
Retired and **Date**	Select *Yes* if the employee is retired, otherwise select *No*. If the employee is retired, specify the retirement date. These fields are not used in eSocial reporting.

Death Certificate

Field or Control	***Description***
Death Certificate Number	Enter the death certificate number, if the employee is deceased.

NIF Data

This section applies to employees who live outside of Brazil.

Field or Control	***Description***
Country	Select the country where the employee resides, as specified in the home address on the Person Data Page - Contact Information Section.
NIF Type	Select the NIF (foreign taxpayer identification number) type. Values are: *Beneficiary w/ NIF* *Country Does Not Require* *Exempt Beneficiary* *Not Applicable*
NIF	Enter the taxpayer identification number if the selected NIF type is *Beneficiary w/ NIF.*
Income Tax Type	Specify the applicable income tax type. This field does not appear if the selected NIF type is *Not Applicable.* This information is used in S-1210 event reporting.

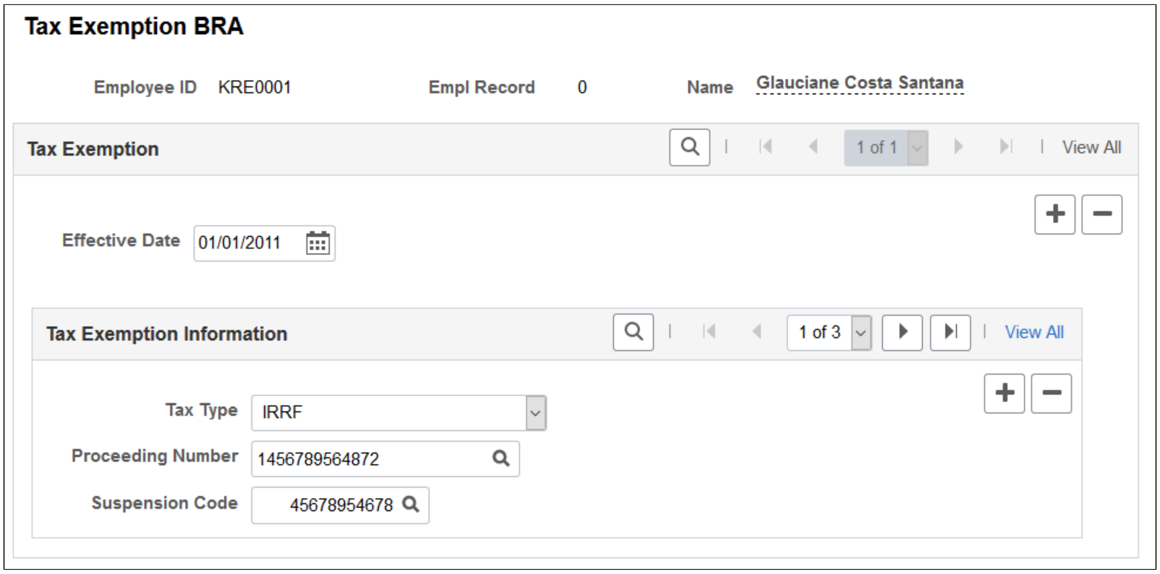
(BRA) Tax Exemption BRA Page

Use the Tax Exemption BRA page (TAX_INFORM_BRA) to manage tax exemption information for employees.

Navigation:

Workforce Administration > **Job Information** > **Tax Exemption BRA** > **Tax Exemption BRA**

This example illustrates the fields and controls on the Tax Exemption BRA page.



Tax Exemption

Field or Control	*Description*
Effective Date	Enter the tax exemption's effective date. Do not enter a date that is earlier than employee's hire date. The system uses this date to determine when the information needs to be reported to the Government. If a tax exemption is provisional, for example, an employee is granted an IRRF tax exemption for 4 months, enter a new effective-dated row after 4 months and remove the IRRF tax exemption from it.

Field or Control	***Description***
Tax Type	Select the type of the tax exemption that the employee has. Values are: *FGTS* *INSS* *IRRF* *Union Contribution* **Note:** Both *FGTS* and *Union Contribution* tax types are no longer used in the S-1.0 version. These values are maintained as historical information and do not drive any eSocial processing in the system. If a tax type is specified, fill out the rest of the fields in this section. You can add multiple tax exemptions with the same tax type and proceeding number, as long as they have different suspension codes.
Proceeding Number	Select the proceeding number of the tax exemption. Proceeding numbers meeting *all* of these conditions are available for selection: • Associated with the *judicial* proceeding type. • Authored by *Other Entity,Company/Employee.* • Created for *Tax or Tax and FGTS.* **Note:** The field prompt is available for use if the Enabled option is selected on the Adm/Legal Proceedings Parameters BRA Page. Enter the number manually, if the option is not selected. Proceedings are defined on the Administrative/Legal Proceedings BRA Page.

Field or Control	*Description*
Suspension Code	Select the tax suspension code for the specified proceeding number. **Note:** The field prompt is available for use if the Enabled option is selected on the Adm/Legal Proceedings Parameters BRA Page. Enter the code manually, if the option is not selected. See Also Administrative/Legal Proceedings BRA Page.

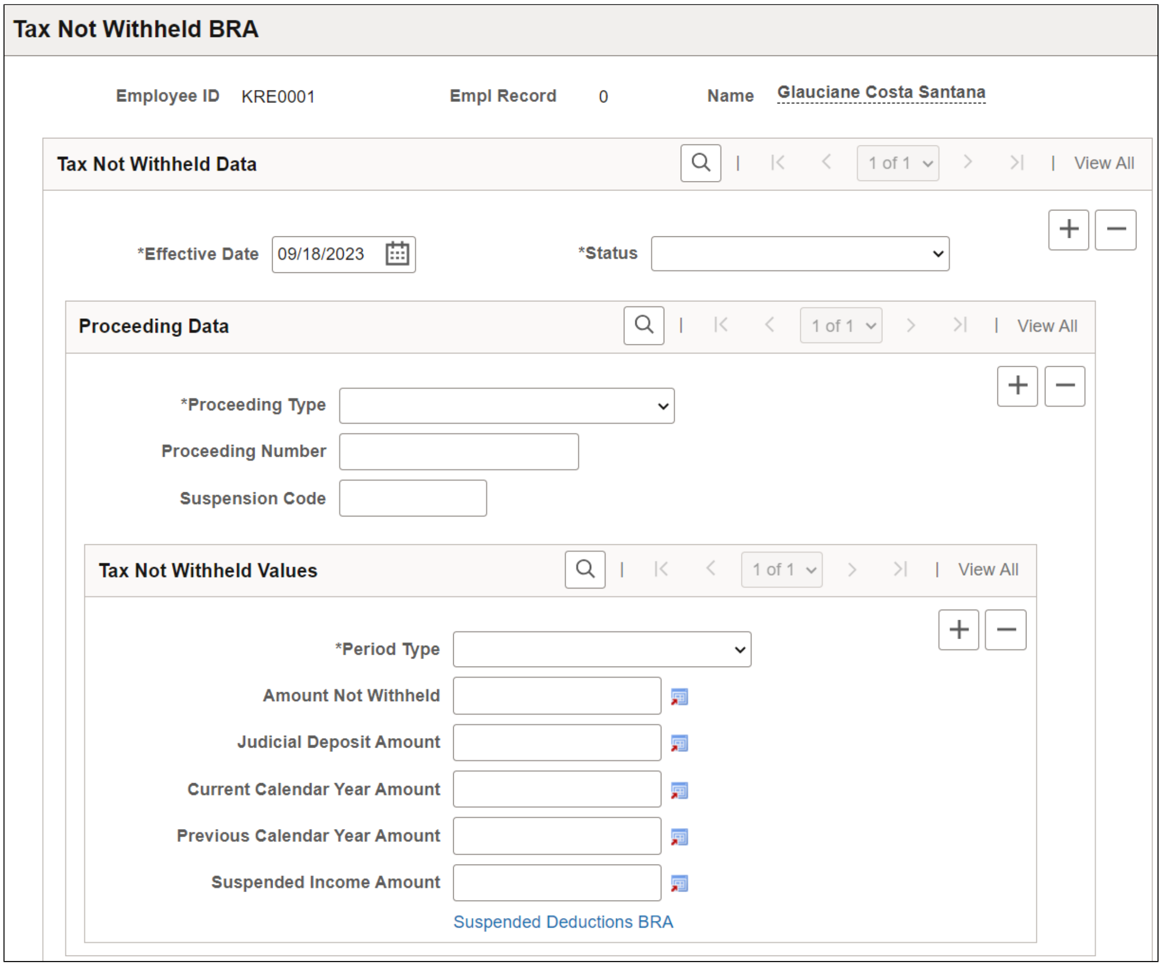
(BRA) Tax Not Withheld BRA Page

Use the Tax Not Withheld BRA page (TX_NO_WITHHELD_BRA) to enter information regarding non-withholding of taxes or judicial deposits for employees.

Navigation:

Workforce Administration > **Job Information** > **Tax Not Withheld BRA** > **Tax Not Withheld BRA**

This example illustrates the fields and controls on the Tax Not Withheld BRA page.



This information is used in S-1210 event reporting.

Proceeding Data

Field or Control	***Description***
Proceeding Type	Enter the government proceeding type. Values are: *Administrative* *Judicial*
Proceeding Number	Enter the proceeding number, or select the proceeding number if the option for proceedings parameters is enabled on the Adm/Legal Proceedings Parameters BRA Page. Proceedings are defined on the Administrative/Legal Proceedings BRA Page.

Field or Control	*Description*
Suspension Code	Enter the suspension code, or select the suspension code if the option for proceedings parameters is enabled on the Adm/ Legal Proceedings Parameters BRA Page.

Tax Not Withheld Values

Field or Control	*Description*
Period Type	Select the calculation period. Values are: *Annual (13th Salary)* *Monthly*
Amount Not Withheld	Enter the withholding amount that is no longer made to the government due to the specified proceeding.
Judicial Deposit Amount	Enter the judicial deposit amount for the specified proceeding.
Current Calendar Year Amount	Enter the compensation amount received in the current calendar year due to the specified proceeding.
Previous Calendar Year Amount	Enter the compensation amount received in the previous year due to the specified proceeding.
Suspended Income Amount	Enter the income amount with suspended liability.
Suspended Deductions BRA	Select to provide more details for the suspended deduction on the (BRA) Suspended Deductions BRA Page.

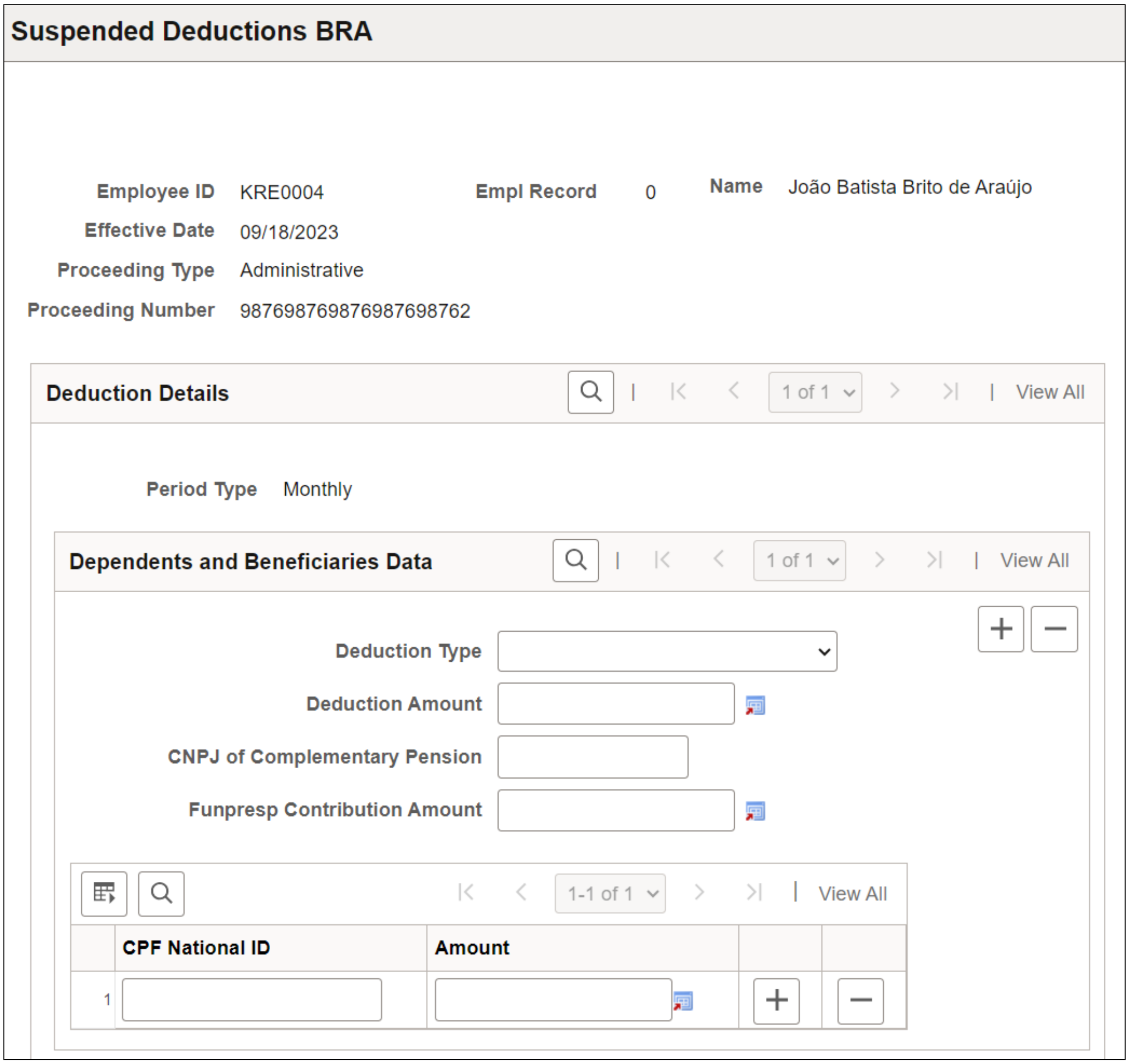
(BRA) Suspended Deductions BRA Page

Use the Suspended Deductions BRA page (SUSP_DED_TXNW_BRA) to enter details for deductions with suspended liability.

Navigation:

- Select the **Suspended Deductions BRA** link on the (BRA) Tax Not Withheld BRA Page.
- **Workforce Administration** > **Job Information** > **Suspended Deductions BRA** > **Suspended Deductions BRA**

This example illustrates the fields and controls on the Suspended Deductions BRA page.



The header information comes from the associated legal proceeding that was previously entered on the (BRA) Tax Not Withheld BRA Page.

If the key information of the proceeding (such as the effective date, proceeding type, proceeding number, suspension code, or period type) is modified on the (BRA) Tax Not Withheld BRA Page, the system deletes the associated suspended deduction information automatically. You need to reenter the information.

This information is used in S-1210 event reporting.

Field or Control	***Description***
Deduction Type	Select an applicable type for the deduction with suspended liability. Values are: *Alimony* *Dependents* *FAPI* *Funpresp* *Private Pension* *Public Pension*
Deduction Amount	Enter the amount of deduction from the income tax calculation base with suspended liability.
CNPJ of Complementary Pension	Enter the 14-digit registration number of the supplementary pension entity.
Funpresp Contribution Amount	Enter the contribution amount from the public entity sponsoring the Complementary Pension Fund for Public Servants (Funpresp), if the selected deduction type is *Funresp.*
CPF National ID and **Amount**	Enter the CPF of the dependent or alimony beneficiary, and their deduction amount with suspended liability.

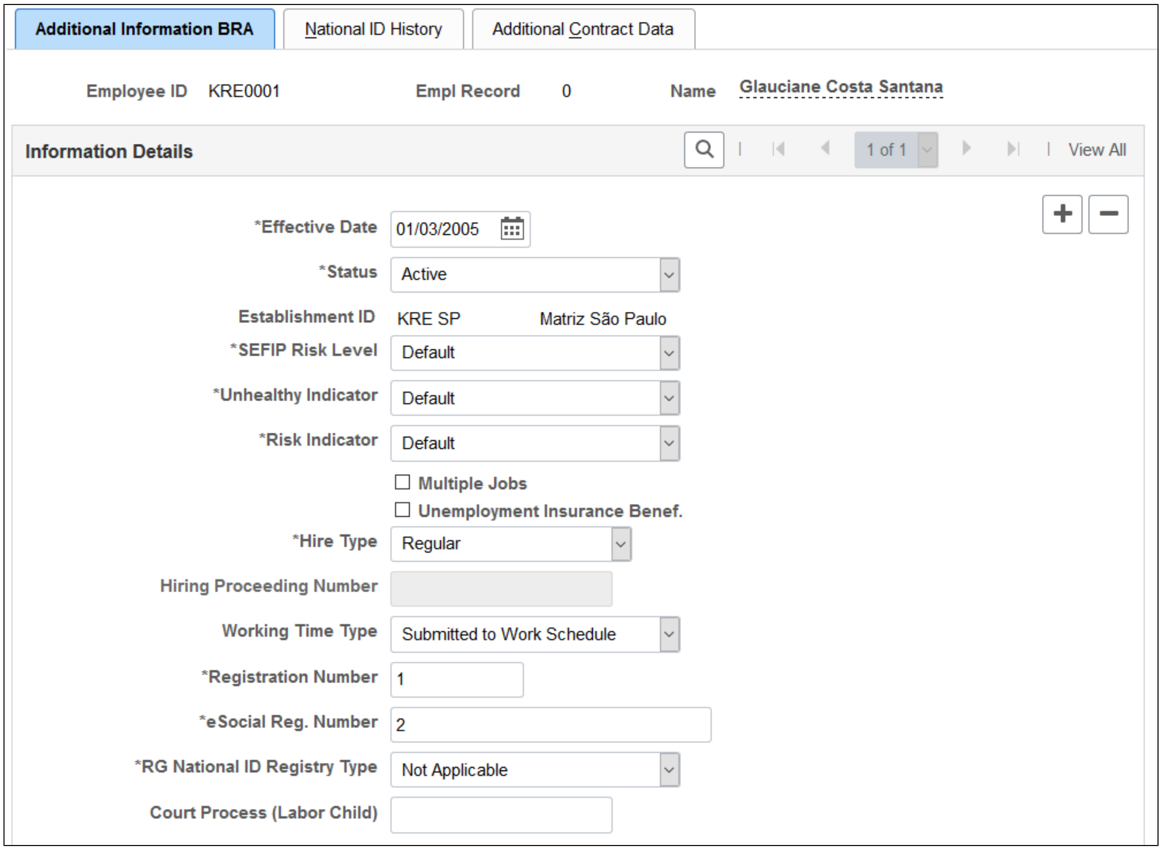
(BRA) Additional Information BRA Page

Use the Additional Information BRA page (ADDL_INFO_BRA) to enter additional worker information.

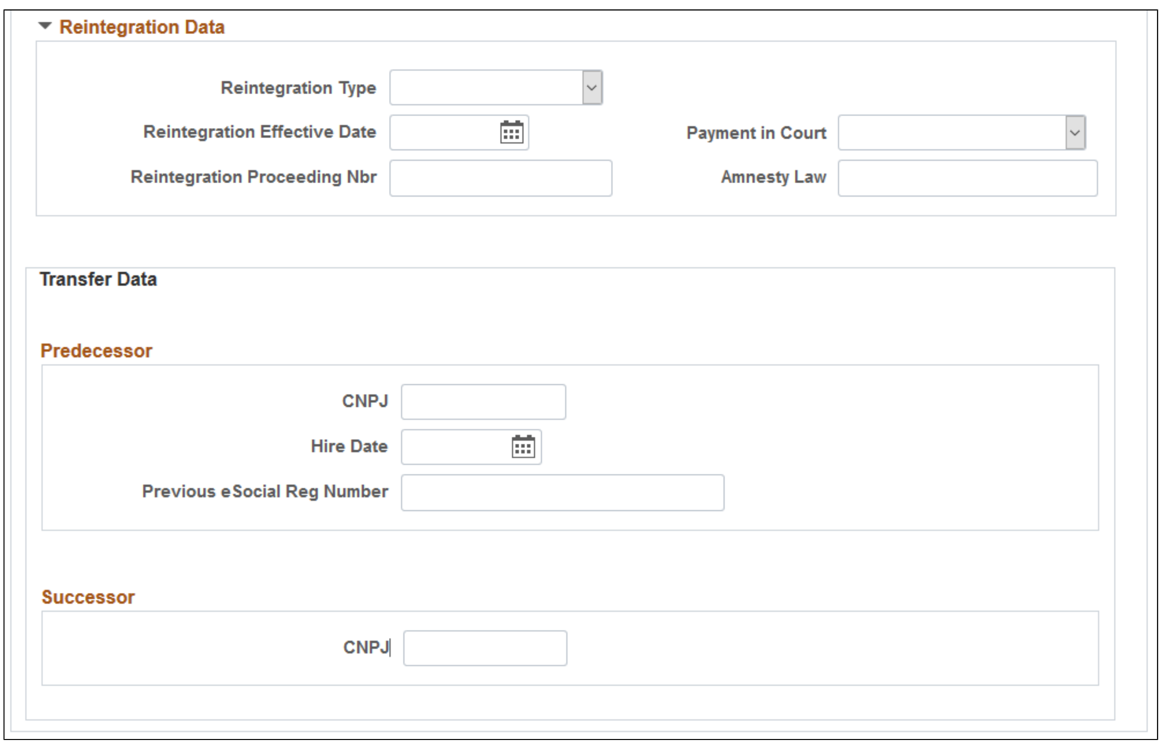
Navigation:

Workforce Administration > **Job Information** > **Additional Information BRA** > **Additional Information BRA**

This example illustrates the fields and controls on the Additional Information BRA page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Additional Information BRA page (2 of 2). You can find definitions for the fields and controls later on this page.



Note: If you have Global Payroll for Brazil installed, you can override the values on this page using the Payee Parameters page.

See "Setting Up Payee Data" (PeopleSoft Global Payroll for Brazil).

Field or Control	***Description***
SEFIP Risk Level	Select the appropriate risk level for the employee's activities. The system uses this information to generate the SEFIP report and to determine the employee's retirement deduction.
Unhealthy Indicator	Select the appropriate health risk level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this health risk factor. Values are: *Default* *Maximum Grade* *Middle Grade* *Minimum Grade* *Not Applicable*
Risk Indicator	Select the appropriate hazard level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this hazardous factor. Values are *Applicable, Default,* and *Not Applicable.*
Multiple Jobs	Select to specify whether this person has one or more jobs outside of this company.
Unemployment Insurance Benef. (unemployment insurance benefits)	Select to specify that this person (new employee) receives unemployment benefits. This field is editable if the effective date corresponds to a Hire or Rehire action in this person's job data. If the newly hired or rehired employee receives unemployment benefits, the company needs to send the CAGED information to the Ministry of Labor and Employment on the same day that the employee begins to work. If the employee does not receive unemployment benefits, the company has until the 7th day of the next month to send out the information, along with other terminated and transferred employment information that occur in the current month.

Field or Control	***Description***
Hire Type	This field appears if the employee’s job data action is *HIRE* and that effective dates of that job data and this additional information record are the same. Values are: *Court Decision* *Fiscal Action* *Regular*
Hiring Proceeding Number	Enter the processing number of the court decision, if the hiring is the result of a court decision. This field becomes editable if *Court Decision* is selected as the hire type.
Working Time Type	Select the applicable working time. Values are: *External Activity* *Functions Specific* *Not Applicable* *Submitted to Work Schedule* (default) *Telecommuting* This information is used in eSocial reporting.
Registration Number	Enter the employee's registration number. This number acts as an alternate employee ID. When an employee is hired, transferred, or rehired through the Job Data component, the system updates this field with the next registration number listed on the Additional Info - Brazil Page of the establishment that is associated with the employee. If an employee was terminated and later rehired with the same establishment, the same registration number is used.

Field or Control	*Description*
eSocial Reg. Number	Displays or enter the employee's 30-digit register number in eSocial. The value in this field is different depending on the eSocial numbering method that is selected for the associated company on the "(BRA) Company Details BRA Page" (Application Fundamentals). If the method is *DRT Number*, the field value should be the same as the registration number on this page. If the method is *Specific to eSocial*, the field values should be the sum of the **eSocial Last Reg Number** field value (on the "(BRA) Company Details BRA Page" (Application Fundamentals)) plus 1. **Note:** This number must be present for all employees in companies *before* they perform initial data loading to the eSocial reporting environment. A new eSocial register number is assigned when the employee is transferred to another company.
RG National ID Registry Type	Select the applicable RG national ID registry type for the employee.
Court Process (Labor Child)	Enter the judicial process number if the employee is a child labor.

Reintegration Data

Enter reintegration data for the employee. If the *Rehire* action and a reason is selected in the employee's Job Data record, and that action and reason combination is set up for eSocial reporting, the information entered in this section will be used in the employee reinstatement event processing.

Field or Control	*Description*
Reintegration Type	Select the reintegration type. Reintegration refers to the rehiring of an employee by court decision, which ensures that all the rights of the previous contract stay intact. Values are: *Amnesty* *Judicial Decision* *Others*

Field or Control	*Description*
Reintegration Effective Date	Enter the effective date of the reintegration. This value becomes required when you enter information in the Reintegration Data section.
Payment in Court	Select *Yes* if court payment was involved.
Reintegration Process Nbr	Enter the associated judicial proceeding number, if the selected reintegration type is *Judicial Decision*.
Amnesty Law	If the reintegration type is *Amnesty*, specify the applicable amnesty law.

Transfer Data

Enter employment transfer data for the employee. If the *Hire, Termination,* or *Transfer* action and a reason is selected in the employee's Job Data record, and that action and reason combination is set up for eSocial reporting, information entered in this section will be used in the hiring or termination event processing.

Predecessor

Complete this section if the employee moved from an employer (the predecessor) that does not use PeopleSoft for eSocial reporting to the current employment that does. The information specified here will be reported to the government through the S-2200 event.

Field or Control	*Description*
CNPJ	Enter the CNPJ number of the predecessor of the individual's employment transfer. An establishment's CNPJ is a 14-digit long number that is displayed in this format: 99999999999999.
Hire Date	Enter the employee's hire date with the predecessor.
Previous eSocial Reg Number	Enter the employee's 30-digit register number in eSocial with the predecessor.

Successor

Field or Control	***Description***
CNPJ	Enter the CNPJ number of the successor of the individual's employment transfer. Specify this value if the employee left the current employment to work for an employer (the successor) that does not use PeopleSoft for eSocial reporting. The information will be reported to the government through the S-2299 event. An establishment's CNPJ is a 14-digit long number that is displayed in this format: 99999999999999.

(BRA) National ID History Page

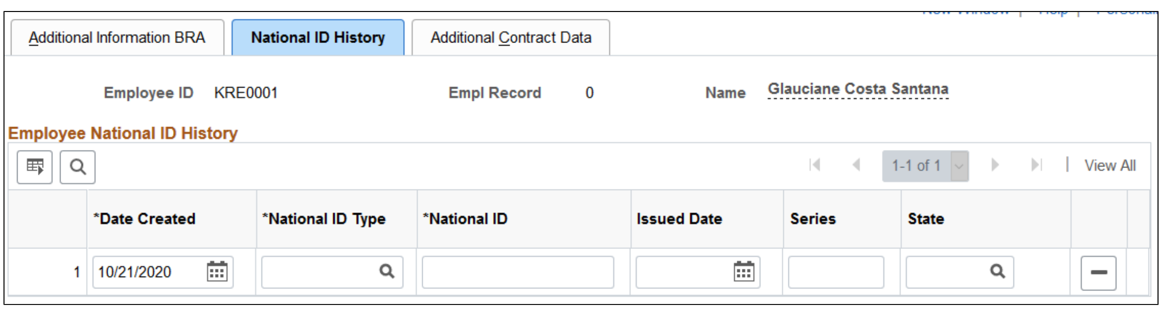
Use the National ID History page (PERS_NID_HI_BRA) to enter the effective dated national ID.

This information is used in SEFIP reporting.

Navigation:

Workforce Administration > **Job Information** > **Additional Information BRA** > **National ID History**

This example illustrates the fields and controls on the National ID History page. You can find definitions for the fields and controls later on this page.



Enter a Brazilian employee's PIS and CTPS (work card) national IDs and supporting data on the Biographical Details and Regional pages of personal data. When one of these national IDs is updated in personal data, a new history record, containing the national ID as well as the additional related data found on Regional page, are entered on the National ID History page. These values can be modified or deleted on this page.

Field or Control	***Description***
Date Created	Displays the date the national ID was entered in the system. This date is used in SEFIP reporting.

Field or Control	***Description***
National ID Type	The national ID comes from the Biographical Details page of personal data. The national ID history only allows the *CTPS* (work card) and *PIS* values.
National ID	Displays the historical national ID number.
Issued Date	Specifies the date this ID was issued. This information comes from the Regional page of personal data. Data entered in the CTPS group box of the Regional page displays for the CTPS (work card) national ID type. The issue date for the PIS national ID type comes from the date entered in the **Inscription Date** field on the Regional page of personal data.
Series	Enter the work card number. This value comes from the Regional page of personal data in the CTPS group box.
State	Enter the political subdivision of the CTPS issuing agency. This value comes from the Regional page of personal data in the CTPS group box. This information is required if a CTPS number is provided.

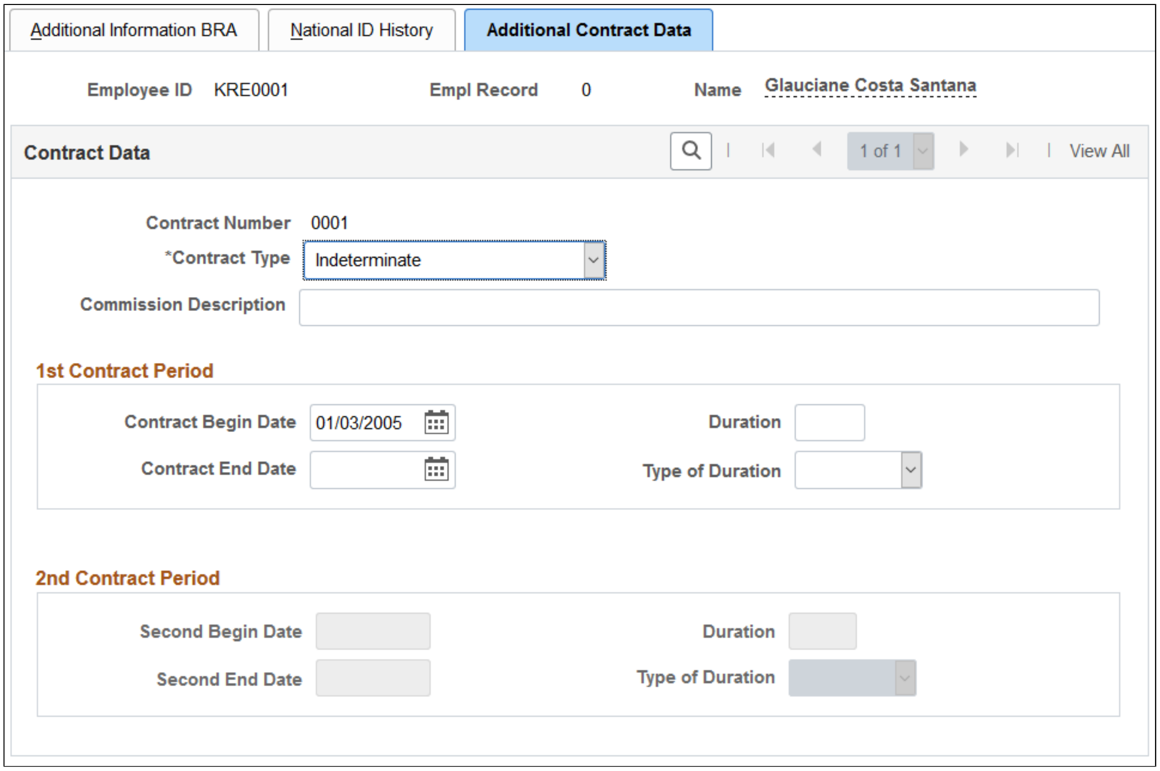
(BRA) Additional Contract Data Page

Use the Additional Contract Data page (CONTRCT_DTA_BRA) to specify the first and second contract periods for the employee who has an active contract.

Navigation:

Workforce Administration > **Job Information** > **Additional Information BRA** > **Additional Contract Data**

This example illustrates the fields and controls on the Additional Contract Data page. You can find definitions for the fields and controls later on this page.



After you specify the contract dates and save the page, the system updates the expected contract end date on the Contract Status/Content Page with the contract end date listed here (the farthest of the two). The expected contract end date is used in processing payroll rules and reports.

Contract Data

Field or Control	***Description***
Contract Number	Displays the number of the contract, if available, that is populated from the Job Information Page.

Field or Control	***Description***
Contract Type	Select the legal contract type for the contract. If the value is populated by the system, the value is determined based on the contract information that is defined on the Job Information Page and the contract type setup that is defined on the Legal Contract Type Page or the By Employee Classification Page. Values are: *Indeterminate*: if selected, you can enter any value as the contract end date or duration. *Determinate*: if selected, the contract end date you entered must be within the two-year period starting from the contract begin date. Only the 1st contract period is available for edits. To support eSocial reporting, select this option for employees who are apprentices. *Indeterminate w/probation prd* (indeterminate with probation period): if selected, you can assign both periods a total of 90 days combined.
Clause of Early Termination	This field appears if the selected contract type is either *Indeterminate w/probation prd* or *Determinate*.
Commission Description	(Optional) Enter the sales commission description.

1st Contract Period

Specify the first contract period by either entering the contract begin and end dates, or entering the contract begin date and the duration of the contract (for example, 2 months, 30 days, and so on). If the latter method is used, the system calculates and populates the contract end date in this section automatically.

Note: When either the contract begin date or the duration is updated, the contract end date is recalculated accordingly.

An error is displayed if the begin date entered is greater than the end date.

2nd Contract Period

The system populates the second begin date value by adding 1 day to the current contract end date. When the duration is specified, the system calculates and populates the second end date automatically.

Note: If the contract end date is recalculated due to a change in the contract begin date or duration, and the newly adjusted second begin date value is not equal to the current second begin date, the system populates the newly adjusted second begin date and clears the second end date and duration values in this section.

An error is displayed if the begin date entered is greater than the end date, or if the contract end date is removed manually when the second begin date value is present.

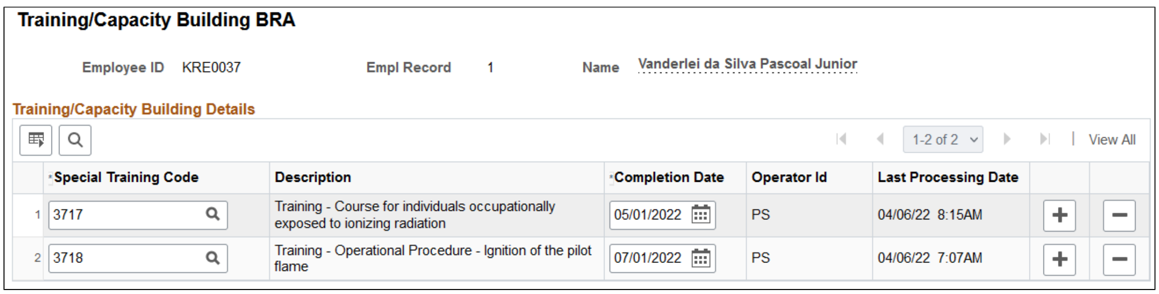
(BRA) Training/Capacity Building BRA Page

Use the Training/Capacity Building BRA page (EMPL_SPEC_TRAI_BRA) to list special training completed by employees.

Navigation:

Workforce Administration > **Job Information** > **Training/Capacity Building BRA** > **Training/ Capacity Building BRA**

This example illustrates the fields and controls on the Training/Capacity Building BRA page. You can find definitions for the fields and controls later on this page.



The system reports this training information for employees to the Brazilian Government using S-2200 and S-2206 events in eSocial. For employees with multiple jobs, training information needs to be added to all applicable employee records.

It doesn't apply to employees who are associated with *721, 722,* or *901* (not employed) labor categories through their employee classification.

If the training data exists in another PeopleSoft module or a legacy system, a component interface (CI_EMPL_TRAINING_BRA) is available to load this data to the Training/Capacity Building BRA page for employees.

Field or Control	***Description***
Special Training Code	Specify the code of the training taken by the employee.
Completion Date	Specify the date the training was completed.

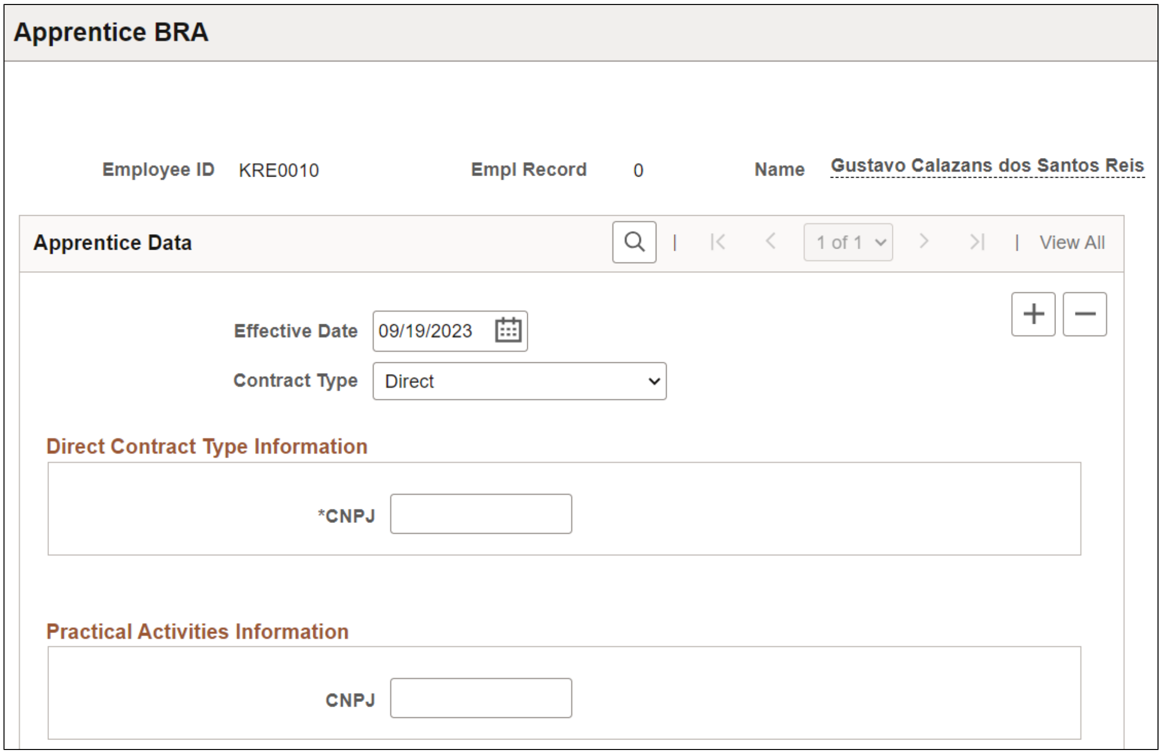
(BRA) Apprentice BRA Page

Use the Apprentice BRA page (APPRENTICE_BRA) to manage apprentice contract information.

Navigation:

Workforce Administration > Job Information > Maintain Apprentice BRA > Apprentice BRA

This example illustrates the fields and controls on the Apprentice BRA page.



You can enter apprentice contract information for individuals with the *Trainee* employee class in Job Data.

This information is used in S-2200, S-2205, and S-2206 event reporting.

Field or Control	***Description***
Contract Type	Specify whether the apprentice contract is a *Direct* or *Indirect* one.

Direct Contract Type Information

This section appears if the selected contract type is *Direct.*

Field or Control	***Description***
CNPJ	Enter the CNPJ number of the establishment for which the apprentice was hired.

Indirect Contract Type Information

This section appears if the selected contract type is *Indirect.*

Field or Control	*Description*
Inscription Type and **Inscription Number**	Select the registration type (*CNPJ* or *CPF*) of the establishment for which the apprentice was hired, and enter the corresponding registration number.

Practical Activities Information

Field or Control	*Description*
CNPJ	Enter the CNPJ number of the establishment where the practical activities are being carried out, when occurred.

(CHN) Providing Personal File Information for Chinese Employees

This topic discusses how to define personal file information.

Page Used to Provide Personal File Information for Chinese Employees

Page Name	*Definition Name*	*Usage*
Personal Information CHN Page	GPCN_FILE_INFO	Define personal file information.

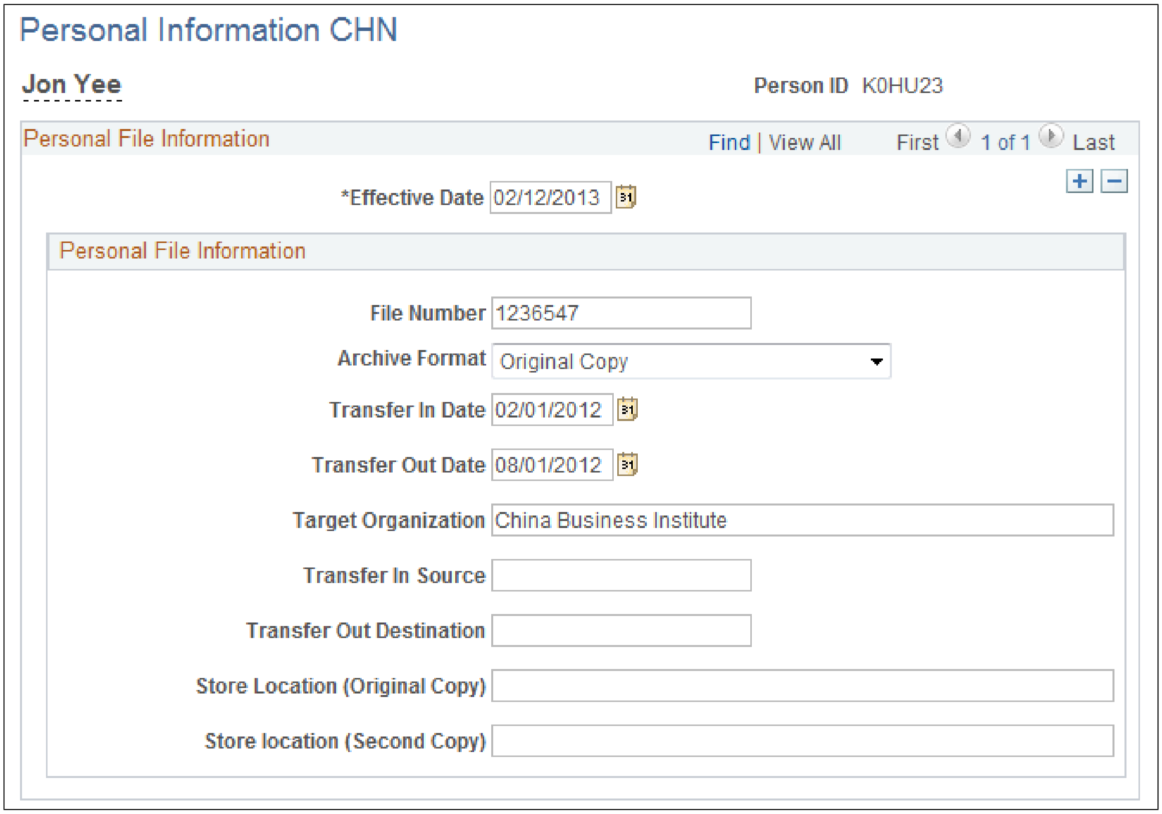
Personal Information CHN Page

Use the Personal Information CHN page (GPCN_FILE_INFO) to define personal file information.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Set Personal Information CHN** > **Personal Information CHN**

This example illustrates the fields and controls on the Personal Information CHN page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
File Number	Enter the employee's personal file number.
Archive Format	Specify the format of the employee's archived file information. Valid values are: • *Film* • *No File Existing* • *Original Copy* • *Original Copy and Film* • *Original Copy, Secondary Copy* • *Original, Secondary Copy & File* • *Other* • *Secondary Copy* • *Secondary Copy and Film*
Transfer In Date and Transfer Out Date	Enter the dates on which the file was transferred in and transferred out.

Field or Control	Description
Target Organization	Enter the organization to which the file was transferred.
Transfer In Source	Enter the source of the file that was originally transferred in.
Transfer Out Destination	Enter the destination to which the file was transferred out.
Store Location (Original Copy)	Enter the location in which the original copy of the file is stored.
Store Location (Second Copy)	Enter the location in which the secondary copy of the file is stored.

(CAN) Providing Additional Information for Canadian Employees

There are a few issues that are unique to a Canadian workforce.

Note: While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, the PeopleSoft system continues to offer Ontario Employment Equity (OEE) reporting functionality.

These topics discuss how to provide additional information for Canadian employees.

Pages Used to Provide Additional Information for Canadian Employees

Page Name	Definition Name	Usage
Workforce Survey Result Page	CAN_OEE_SURVEY	Enter OEEC workforce survey responses.
Official Languages Page	PERS_OFFLNG_CAN	Record employee-level information about the use of official languages. The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.
Groups by OCC Group Report Page	RUNCTL_FTCANAC	Generate the OEE Groups by OCC Group report (PER103CN). The report lists the totals of active employees, within the defined area codes, employed within the date range.

Page Name	***Definition Name***	***Usage***
Groups by Emplymt Type Rpt Page	RUNCTL_FTCANAC	Generate the OEE Groups by Employment Type report (PER104CN).
Groups / Jobs Filled/Vacated Page	RUNCTL_FTCANAC	Generate the OEE Groups by Jobs Filled/ Vacatd report (PER106CN), which lists the totals of active employees, within the defined area codes, employed within the date range.
Workforce Survey Stats Page	RUNCTL_PER105CN	Run the OEE Work Force Survey Stats report (PER105CN). The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.

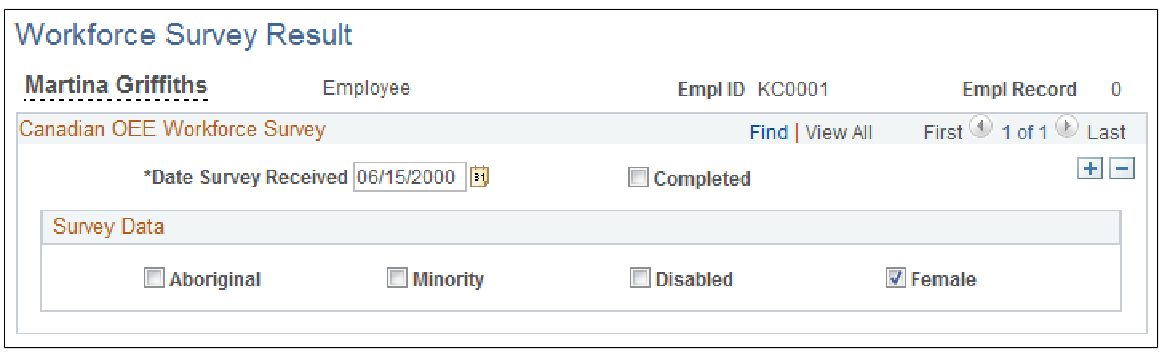
Workforce Survey Result Page

Use the Workforce Survey Result page (CAN_OEE_SURVEY) to enter OEEC workforce survey responses.

Navigation:

Workforce Administration > **Personal Information** > **OEE Workforce Survey CAN** > **Workforce Survey Result** > **Workforce Survey Result**

This example illustrates the fields and controls on the Workforce Survey Result page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Date Survey Received	Enter the date on which the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.
Completed	Select to indicate that the survey was completed.

Field or Control	***Description***
Survey Data	Indicate whether the survey respondent is *Aboriginal, Minority, Disabled,* or *Female.*

Official Languages Page

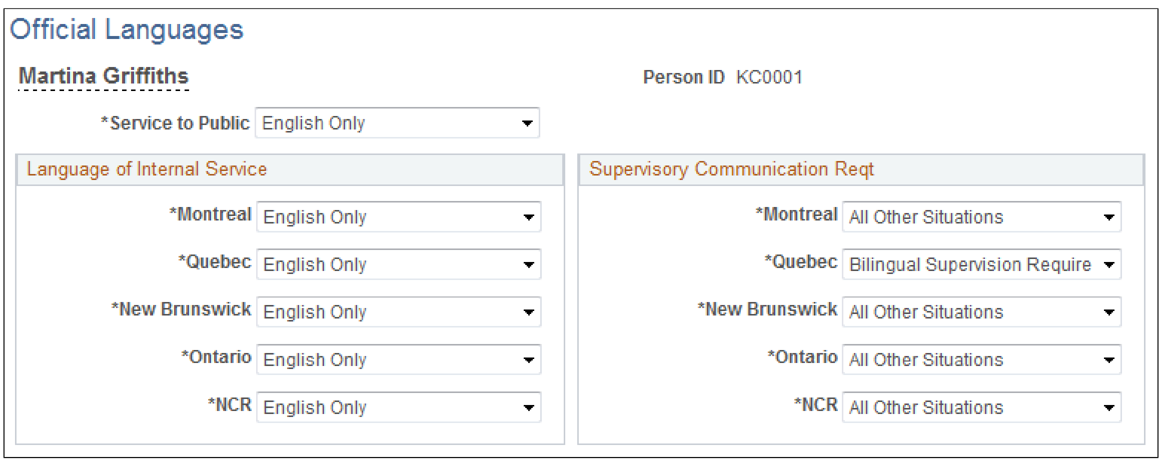
Use the Official Languages page (PERS_OFFLNG_CAN) to record employee-level information about the use of official languages.

The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.

Navigation:

Workforce Administration > **Personal Information** > **OEE Workforce Survey CAN** > **Official Languages** > **Official Languages**

This example illustrates the fields and controls on the Official Languages page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Service to Public	Indicate which languages the employee uses to provide service to the public.

Language of Internal Service

Field or Control	***Description***
Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)	For the locations listed in this group box, indicate which languages the employee uses to communicate internally. Select *N/A (not applicable)* for those locations that don't apply.

Supervisory Communication Reqt (Supervisory Communication Required)

Field or Control	*Description*
Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)	For the locations listed in this group box, indicate which languages the employee requires for supervisory communication. Select *N/A (not applicable)* for those locations that don't apply.

Related Links

"Running Official Languages Reports" (PeopleSoft Human Resources Meet Regulatory Requirements)

(CHE) Running the Company Statistics Report

The Swiss Federal Department of Statistics requires all Swiss companies to create this report every 10 years.

Page Used to Run the Company Statistics Report

Page Name	*Definition Name*	*Usage*
Company Statistics CHE Page	RUNCTL_PER001_CHE	Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics report (Betriebszaehlung). If GP Switzerland is installed, the payroll offers two statistic reports that replace this one—the BESTA Statistics (GPCHST01.SQR) and Salary Structure Analysis (GPCHST02.SQR) reports.

(FRA) Providing Additional Information for French Workers

These topics discuss providing additional information for French workers.

Pages Used to Provide Additional Information for French Workers

Page Name	*Definition Name*	*Usage*
Mandates FRA Page	MANDATES_FRA	Track mandate information for French workers.

Page Name	*Definition Name*	*Usage*
Military Situation FRA Page	MILIT_SITUATN_FRA	Enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

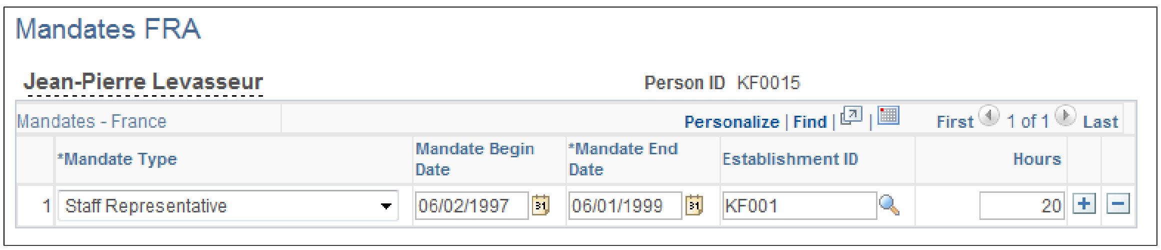
Mandates FRA Page

Use the Mandates FRA page (MANDATES_FRA) to track mandate information for French workers.

Navigation:

Workforce Administration > **Job Information** > **Mandates FRA** > **Mandates FRA**

This example illustrates the fields and controls on the Mandates FRA page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Mandate Type	Select a mandate type.
Mandate Begin Date and **Mandate End Date**	Enter the mandate begin and end dates during which the worker was associated with the mandate type.
Establishment ID	Select an establishment ID.
Hours	Indicate the number of hours for the mandate, if appropriate.

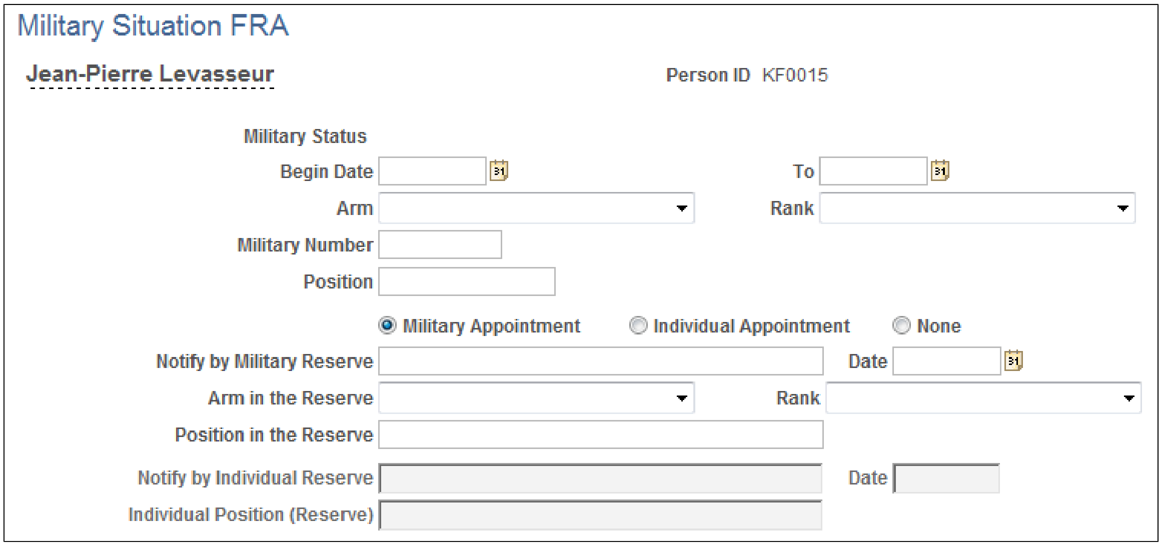
Military Situation FRA Page

Use the Military Situation FRA page (MILIT_SITUATN_FRA) to enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

Navigation:

Workforce Administration > **Personal Information** > **Biographical** > **Military Situation FRA** > **Military Situation FRA**

This example illustrates the fields and controls on the Military Situation FRA page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Begin Date and**To Date**	Indicate the begin and end date for the worker's military service.
Arm	Select the arm of the military in which the worker served.
Rank, **Military Number,** and **Position**	Indicate the worker's rank, military number, and position if known.
Military Appointment, **Individual Appointment,** and **None**	Indicate if the service was the result of a military appointment, an individual appointment, or none (to indicate that the worker wasn't appointed to the position).

If the worker had a military appointment, enter additional reserve information.

Field or Control	*Description*
Notify by Military Reserve	Enter the appropriate Notify by Military Reserve information.
Date	Enter the date of notification.
Arm in the Reserve	Enter the worker's arm in the reserve.
Rank	Enter the worker's rank.

If the worker has an individual appointment, enter additional information.

Field or Control	*Description*
Notify by Individual Reserve	Enter the appropriate Notify by Individual Reserve information.
Date	Enter the date of notification.
Individual Position (Reserve)	Enter the worker's individual position in the reserve.

(NLD) Recording and Reporting Diversity Information for Dutch Workers

These topics provide an overview of the diversity reporting and discuss recording and reporting diversity information for Dutch workers:

Note: Since December 31, 2003, the SAMEN law is now longer a legislative requirement. However, PeopleSoft application maintains the functionality to allow you to track diversity in your company.

Pages Used to Record and Report Diversity Information for Dutch Workers

Page Name	*Definition Name*	*Usage*
Diversity Registration Page	SAMEN_NLD	Establish worker ethnic status to comply with diversity laws for a qualifying Dutch worker.
Diversity Reporting Page	RUNCTL_PER038_NL	Run the Diversiteit Rapport (Diversity Report NLD) report (PER038NL).

Understanding Diversity Reporting

If you have a Dutch workforce, you may need to track information on the national origin of an employee's birth parents. This information establishes the ethnic status of workers and provides for diversity reporting in the Netherlands.

Diversity reporting provides for equal employment opportunities for immigrant workers or their children or both. The birth country of either the employee or one of the employee's parents can be recorded for reporting to the Dutch government.

When you select a birth country for the employee's parents, you can choose only from among those countries stored in the Country Table for HR (HR_COUNTRY_DEFN) table. The system indicates if the birth country is one of the target countries stored in the Country Table for HR table. When the selected country is *IDN* (Indonesia), an additional category appears, which indicates an additional choice to record diversity information.

Diversity Registration Page

Use the Diversity Registration page (SAMEN_NLD) to establish worker ethnic status to comply with diversity laws for a qualifying Dutch worker.

Navigation:

Workforce Administration > **Personal Information** > **Diversity Compliance NLD** > **Diversity Registration** > **Diversity Registration**

This example illustrates the fields and controls on the Diversity Registration page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Objection Registration	Select if the employee objects to being included in the diversity reporting to the Dutch government. If selected, the system won't include the employee when you generate the diversity report.
Included in Target Group	Select to include the employee in the diversity reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

Target Group - Diversity Mgmt

Field or Control	***Description***
Birth Country	Displays the employee's birth country. **Note:** The system always displays the employee's birth country and indicates if it is one of the target countries stored in the Country Table for HR table.

Field or Control	***Description***
Father's Birth Country and **Mother's Birth Country**	Select the birth country of the employee's father and mother.
Category	This field appears if a birth country is *IDN* (Indonesia). Select one of these values to fulfill diversity requirements: • *Former Netherlands East Indies:* (born in Indonesia before December 27, 1949). • *Incl. Law Rietkerk-uitkering:* (in Register 1b, Rietkerk-uitkering law). • *Indonesia (after 27-12-1949):* (born in Indonesia after December 27, 1949).
In Target Group	The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored in the Country Table for HR table.

Diversity Reporting Page

Use the Diversity Reporting page (RUNCTL_PER038_NL) to run the Diversiteit Rapport (Diversity Report NLD) report (PER038NL).

Navigation:

Workforce Administration > **Personal Information** > **Diversity Compliance NLD** > **Diversity Reporting** > **Diversity Reporting**

The Diversiteit Rapport (Diversity Report NLD - PER038NL) produces the required diversity statistics information. The reports lists the number of people in the workforce who were born in a target country, or one of whose parents was born in one.

Note: This report is only available in Dutch.

(ITA) Recording Additional Hiring Data for Italian Workers

This topic discusses how to run the Matricula Book Calculation process.

Pages Used to Record Additional Hiring Data for Italian Workers

Page Name	***Definition Name***	***Usage***
Employment Categorization IT - Documents Page	EMPL_DOC_ITA	Record an employee's workbook code and employment eligibility, or C1 declaration code and release date.
Employment Categorization ITA - Job Letters Page	EMPL_JOBLTR_ITA	Use the Employment Categorization ITA - Job Letters page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement, and employee category information. Select the **Print Letter** check box and enter the date. Select **Save** to print the letter.
Employment Categorization ITA - Company Codes Page	EMPL_COMP_CD_ITA	Use the Employment Categorization ITA - Company Codes page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes.
Matricula Book - Personal/Job Data Page	EMPL_MATR_BOOK_ITA	View or update data to be included in the Matricula book.
Matricula Book - Address Data Page	EMPL_MTRBKADDR_ITA	View or update Matricula book address data.
Matricula Calculation Page	RUNCTL_MATRBK_ITA	Run the Matricula Book Calc process to update the Matricula table.

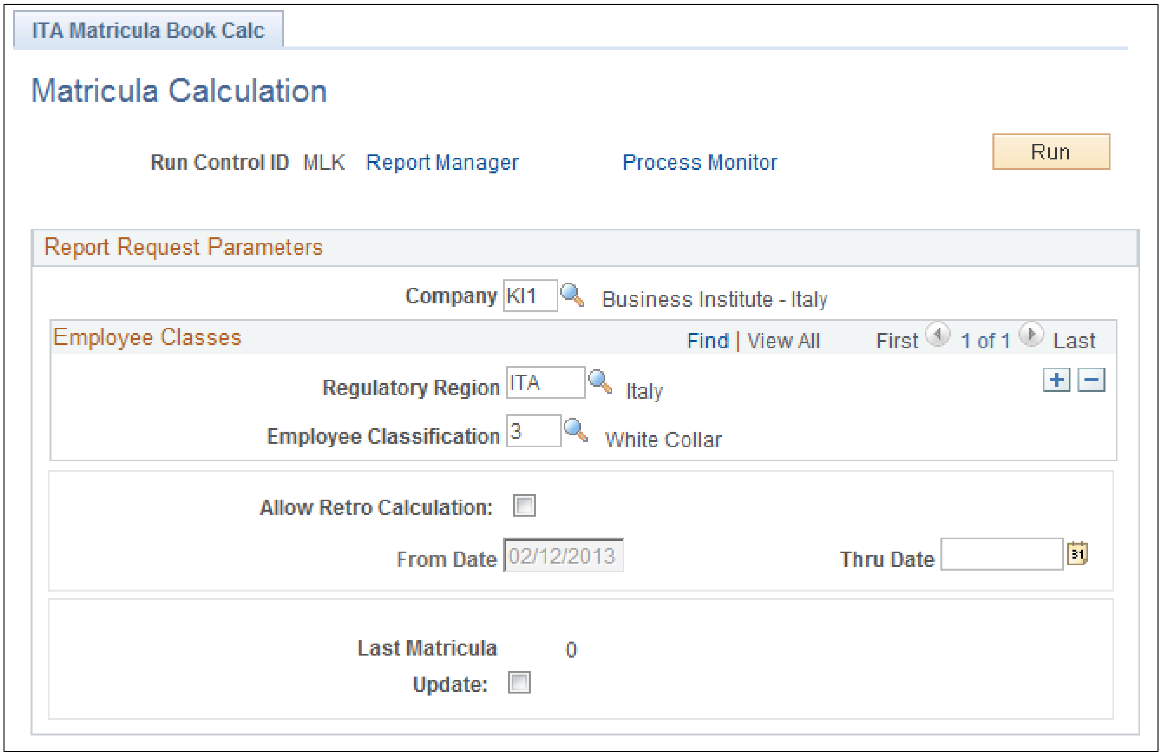
Matricula Calculation Page

Use the Matricula Calculation page (RUNCTL_MATRBK_ITA) to run the Matricula Book Calc process to update the Matricula table.

Navigation:

Workforce Administration > **Job Information** > **Employment Categorization ITA** > **Matricula Calculation** > **Matricula Calculation**

This example illustrates the fields and controls on the Matricula Calculation page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Employee Classification	Select the employee classification for this book.
Allow Retro Calculation	Select to enable retroactive calculations to capture previously lost or missed matricula data.
Last Matricula and **Update**	Select if you want the process to check for new matricula data only.

(ITA) Recording End of Employment Information for Italian Workers

This topic discusses how to record employee resignation dates and normal notice periods.

Page Used to Record End of Employment Information for Italian Workers

Page Name	*Definition Name*	*Usage*
Terms Page	EMPL_TERMS_ITA	Record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

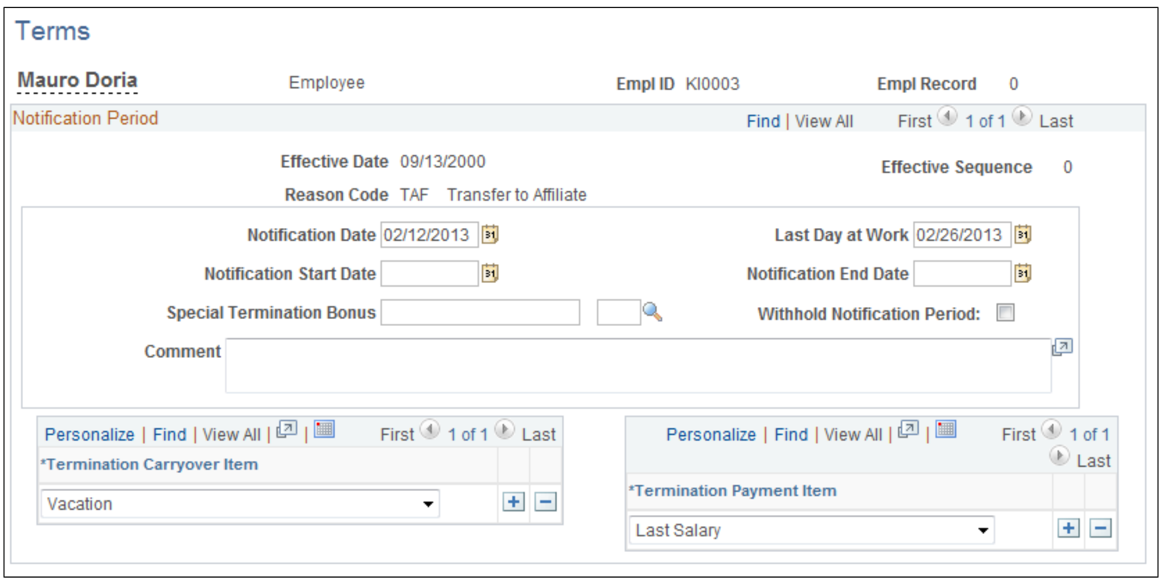
Terms Page

Use the Terms page (EMPL_TERMS_ITA) to record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

Navigation:

Workforce Administration > **Job Information** > **Employee Categorization ITA** > **Terms** > **Terms**

This example illustrates the fields and controls on the Terms page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Notification Date	Enter the date on which the employee gave notice of intent to end the contract.
Last Day at Work	Enter the last day the employee will be at work.

Field or Control	Description
Notification Start Date and **Notification End Date**	Enter the start and end dates of the notification (preavviso) period, that is, the period for which the employer still pays contributions after termination. If the employment is terminated by the payee and notification is to be withheld, this is the period for which the amount should be withheld.
Special Termination Bonus	Enter any bonus incentive owed to the employee.
Withhold Notification Period	Indicates whether the employee's salary is to be withheld during the period between the notification start and end dates. This is an information-only field.
Termination Carryover Item	Enter items that the employee can carry over for a termination. For example, during terminations such as a term for transfer to an affiliate, the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company.
Termination Payment Item	Enter items that should be paid after termination.

(ITA) Running the Equal Opportunities Report

This topic discusses how to run the Equal Opportunities report.

Page Used to Run the Equal Opportunities Report

Page Name	Definition Name	Usage
Equal Opportunities ITA Page	RUNCTL_PER053	Run the ITA Equal Opportunities report (PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Equal Opportunities ITA Page

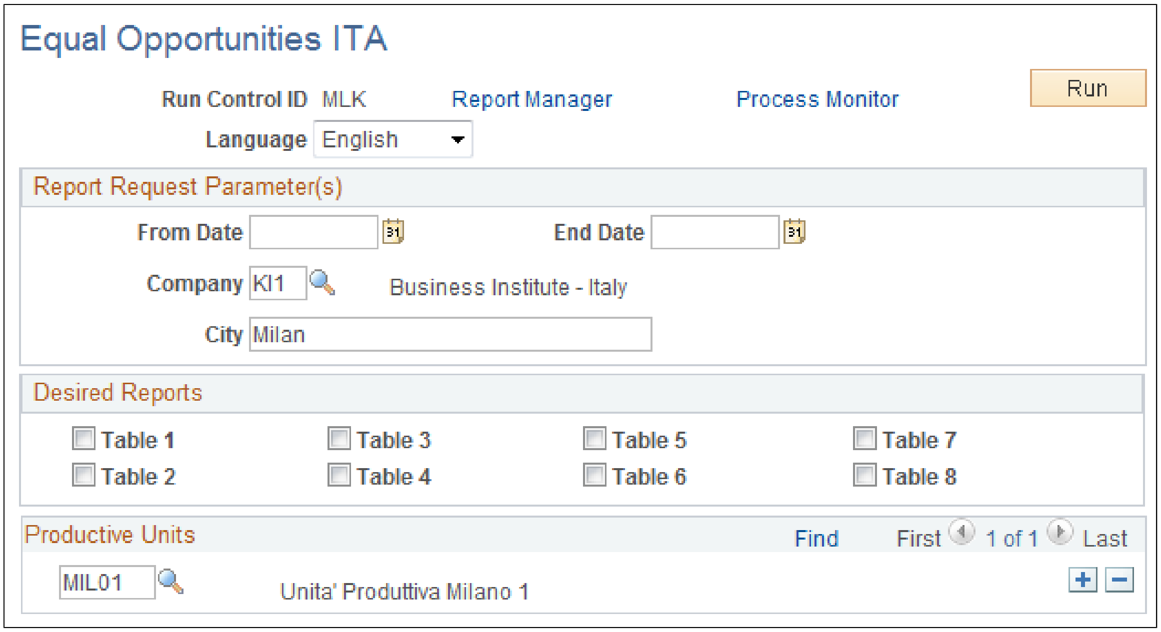
Use the Equal Opportunities ITA page (RUNCTL_PER053) to run the ITA Equal Opportunities report (PER053).

This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Navigation:

Workforce Administration > **Labor Administration** > **Reports** > **Equal Opportunities ITA** > **Equal Opportunities ITA**

This example illustrates the fields and controls on the Equal Opportunities ITA page. You can find definitions for the fields and controls later on this page.



Desired Reports

Select the Equal Opportunities report tables that you want to populate.

Field or Control	*Description*
Table 1 (Informazioni Generali Sull'azienda)	This table contains: • Company and location information. • Total number of employees as of December 31st of the second year of the reported period. • Economic activity, including IVA organization codes. • All CCNL information that applies.
Table 2 (Informazioni generali sulle unitá nell'ambito comunale)	This table contains: • Location address. • Total number of employees at that location as of the reporting date. • Number of employees as of December 31st of the second year of the reported period.

Field or Control	***Description***
Table 3 (Entrate e uscite nel biennio)	This table contains: • Number of employees as of December 31st of the first year of the reported period. • The number of starts as of December 31st of the first year of the reported period. • The number of end of employments as of December 31st of the first year of the reported period. • Number of employees as of December 31st of the second year of the reported period.
Table 4 (Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno)	Lists the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai. Within each category, the report lists the number of employees per category level.
Table 5 (Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa)	Lists, per contract type, the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai.
Table 6 (Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio))	This table contains the following information listed by category (dirigenti, quadri, impiegati, and operai): • Hires, including employees transferred from another location of the company, employees changed from another category, and new hires. • Terminations, including employees transferred to another location of the company or transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability). • Contract changes, including from *Determine Period* to *Undetermined,* from part-time to full-time, and vice versa.
Table 7 (Formazione del personale svolta nel corso del secondo anno del biennio)	This table contains the following information listed by category (dirigenti, quadri, *impiegati,* and operai): • Number of training participants. • Total hours of training participation per category.

Field or Control	Description
Table 8 (Retribuzione annua (secondo anno del biennio) per livello e categoria professionale)	This table contains the annual gross salary amount subdivided by category (dirigenti, quadri, impiegati, and operai) and contractual level.

Productive Units

Select the productive units of the employees on whom you're reporting.

(USA) Managing I-9 Information

These topics provide an overview of managing I-9 information and discuss how to complete, update, print, and archive I-9 data.

This video provides information on updates to the I-9 Form information:

Video: Image Highlights, PeopleSoft HCM Update Image 34: Form I-9 2020 Updates for USA

Pages Used to Manage I-9 Information

Page Name	Definition Name	Usage
(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation	HR_I9_EE	(Employee) Complete the Section 1: Employee Information and Attestation section for self identification and employment authorization for Form I-9. If you are a person that assisted the employee in the completion of the Form I-9 information, enter your name and address in the Preparer and/or Translator Certification section of this page.
USCIS Form I-9 - Submit Confirmation Page	EO_SUBMIT_CONFIRM	View a confirmation that you have successfully submitted the Form I-9. This page appears after the employee, preparer, translator, or representative successfully completes the required information and submits the Form I-9.
(Employer) Employment Eligibility Verification Page, Section 2. Employer Review and Verification	HR_I9_ADMIN_SEC2	(Employer) Complete the Section 2. Employer Review and Verification to complete the confirmation of the Form I-9.

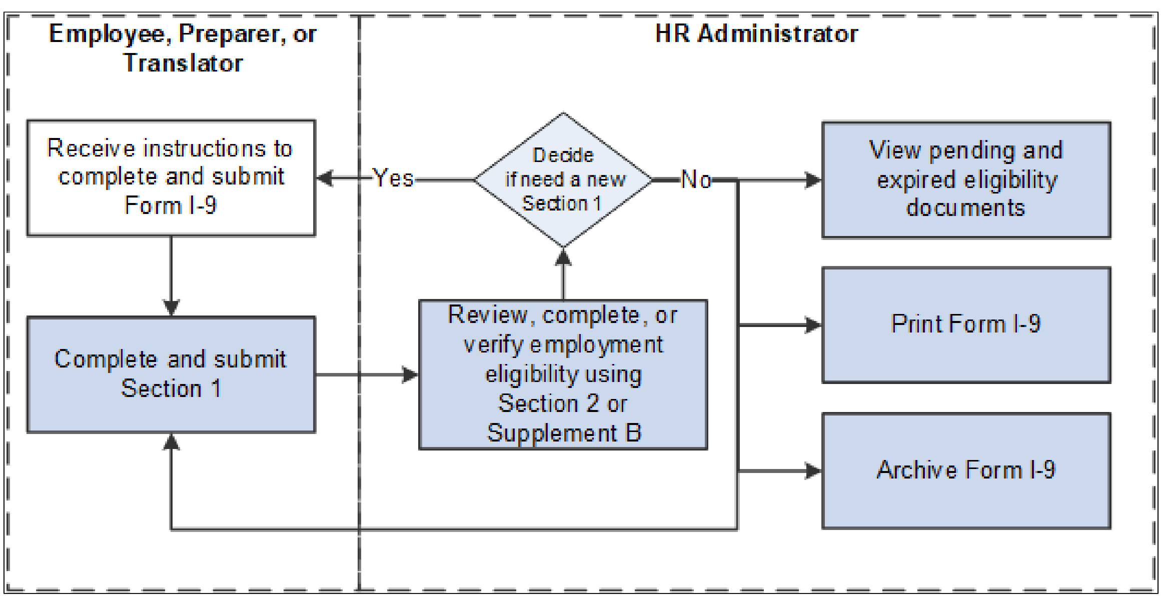
Page Name	***Definition Name***	***Usage***
(Employer) Employment Eligibility Verification Page, Supplement B, Reverification and Rehire (formerly Section 3)	HR_I9_ADMIN_SEC2	(Employer) Complete the Supplement B, Reverification and Rehire (formerly Section 3) to complete the confirmation of the Form I-9.
Print Form I-9 Page	HR_RUNCTL_I9_FORM	Generate the Form I-9s in PDF format.
I-9 Receipt/Expiration Report Page	HR_RUNCTL_I9_VERFY	Identify Form I-9s that require re-verification and notify administrators.

Understanding I-9 Information Management

The Immigration and Nationality Act requires United States employers to complete and store Form I-9. Employers may process paper Form I-9s and store them electronically or complete and retain the Form I-9 solely in electronic format.

PeopleSoft Human Resources enables you to collect, store, and manage all I-9 information in compliance with the Immigration and Nationality Act. This includes employee self service functions to complete and submit the employee I-9 information, and functionality for the employer to complete the required employer sections of the Form I-9. The application provides components to report and process I-9 information, including notification of expiration dates, storing, printing, and archiving.

This example illustrates the process flow for completing the Form I-9 online.



Completing the Form I-9 online requires the following steps:

1. An employee must submit employment verification information on the first day of employment. The employee, preparer, or translator for the employee can fill out the identification and citizenship information for section 1 on the self service Form I-9 - Employment Eligibility Verification page.

2. After the employee submits this information, the HR administrator will:

a. Review and complete sections 2 or supplement B of the Form I-9 required by the employer using the Complete/Reverify Form I-9 component.

   If a new I-9 is needed, the administrator can send notification to the employee to complete a new Form I-9.

b. Manage the I-9s by viewing pending and expired documents, printing Form I-9, or archiving data that is no longer needed.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

(Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation

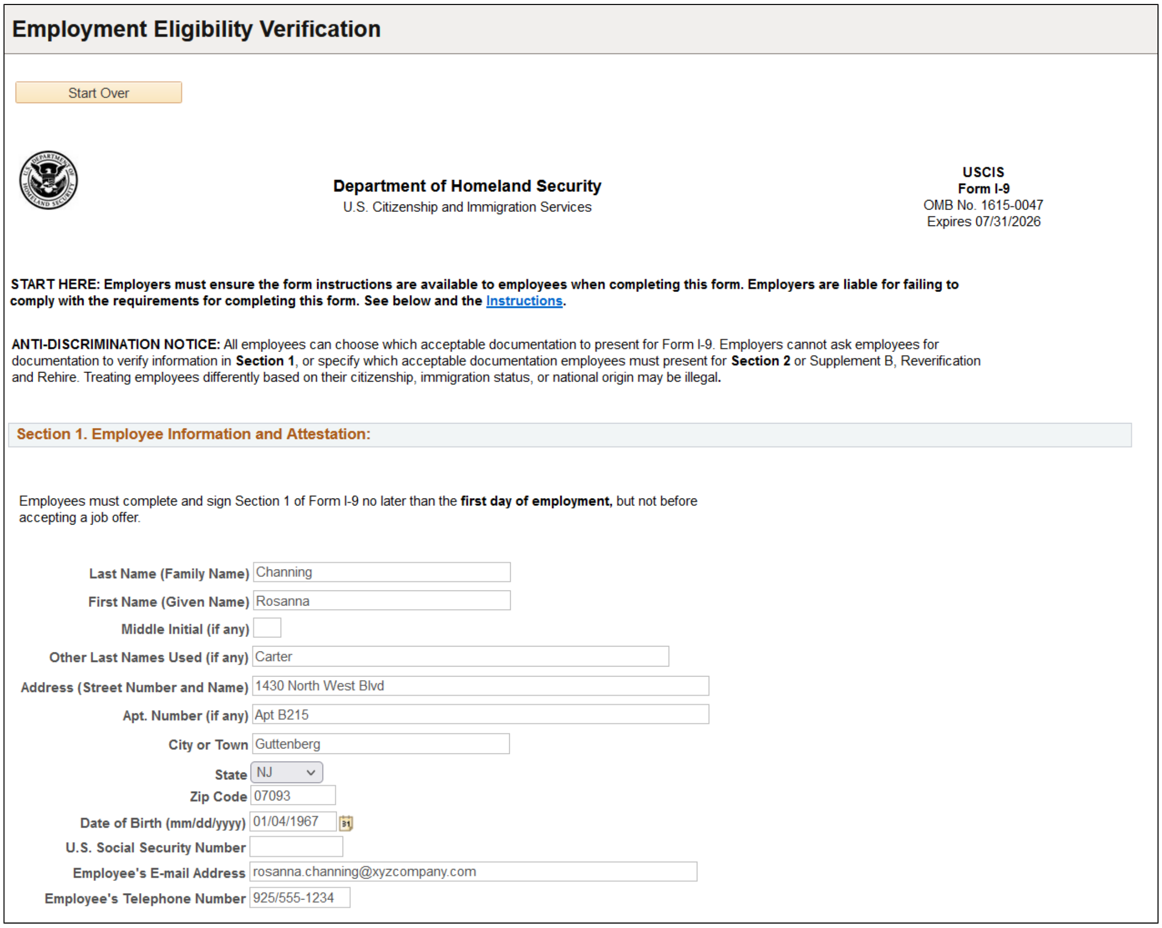
Employees use the Employment Eligibility Verification page (HR_I9_EE), Section 1: Employee Information and Attestation to complete self identification and employment authorization for Form I-9. If you are a person that assisted the employee in the completion of the Form I-9 information, enter your the name and address in the Preparer and/or Translator Certification section of this page.

Navigation:

- **Self Service** > **Personal Information** > **Form I-9** > **Employment Eligibility Verification**
- **Employee Self Service home page** > **Personal Details tile**, then do one of the following, based on your fluid role security:
  - Select the Form I-9 category tab from the left panel navigation, then select **Submit Form I-9**.
  - Select the Form I-9 tile, then select the **Submit Form I-9** button.

  For Fluid self-service access, see the "(USA) Form I-9 Page" (PeopleSoft eProfile) (HR_I9_EE_FL).

This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 1. Employee Information and Attestation (1 of 3).



Employment Eligibility Verification

Start Over

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 07/31/2026

START HERE: Employers must ensure the form instructions are available to employees when completing this form. Employers are liable for failing to comply with the requirements for completing this form. See below and the Instructions.

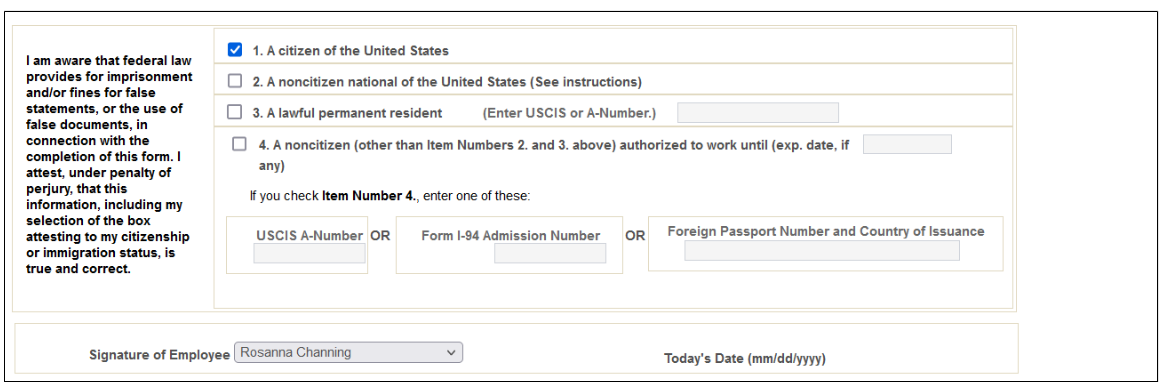
ANTI-DISCRIMINATION NOTICE: All employees can choose which acceptable documentation to present for Form I-9. Employers cannot ask employees for documentation to verify information in **Section 1**, or specify which acceptable documentation employees must present for **Section 2** or Supplement B, Reverification and Rehire. Treating employees differently based on their citizenship, immigration status, or national origin may be illegal.

Section 1. Employee Information and Attestation:

Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment,** but not before accepting a job offer.

Last Name (Family Name)	Channing
First Name (Given Name)	Rosanna
Middle Initial (if any)	
Other Last Names Used (if any)	Carter
Address (Street Number and Name)	1430 North West Blvd
Apt. Number (if any)	Apt B215
City or Town	Guttenberg
State	NJ
Zip Code	07093
Date of Birth (mm/dd/yyyy)	01/04/1967
U.S. Social Security Number	
Employee's E-mail Address	rosanna.channing@xyzcompany.com
Employee's Telephone Number	925/555-1234

This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 1. Employee Information and Attestation (2 of 3).



I am aware that federal law provides for imprisonment and/or fines for false statements, or the use of false documents, in connection with the completion of this form. I attest, under penalty of perjury, that this information, including my selection of the box attesting to my citizenship or immigration status, is true and correct.

- [x] 1. A citizen of the United States
- [ ] 2. A noncitizen national of the United States (See instructions)
- [ ] 3. A lawful permanent resident (Enter USCIS or A-Number.)
- [ ] 4. A noncitizen (other than Item Numbers 2. and 3. above) authorized to work until (exp. date, if any)

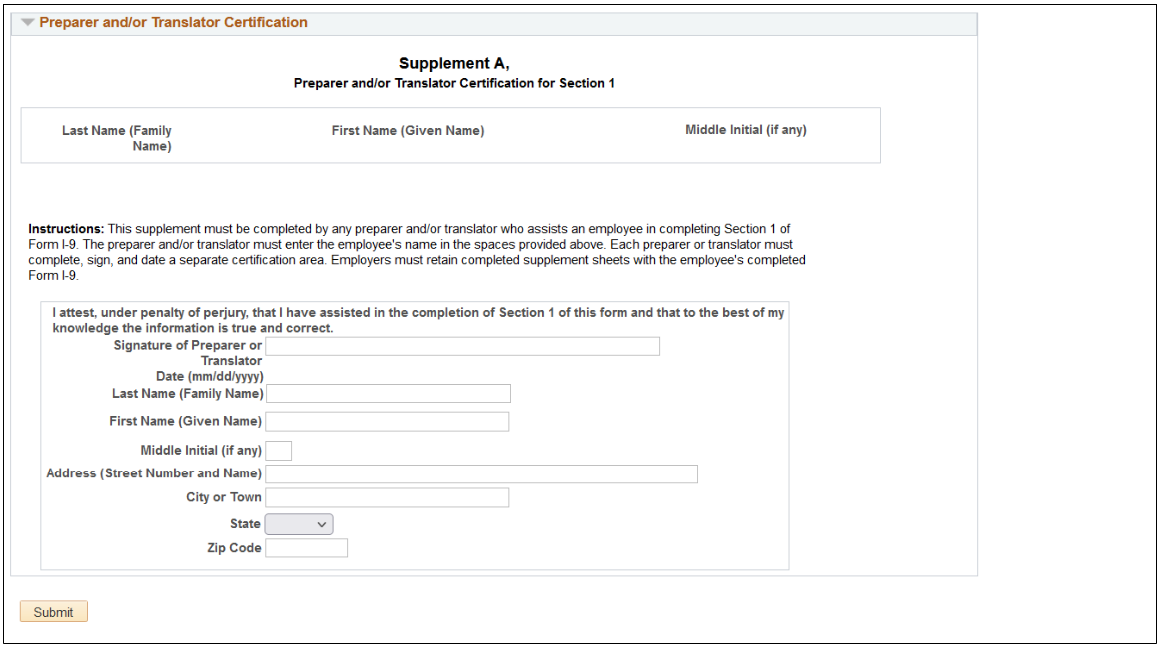
If you check **Item Number 4.**, enter one of these:

USCIS A-Number OR Form I-94 Admission Number OR Foreign Passport Number and Country of Issuance

Signature of Employee: Rosanna Channing

Today's Date (mm/dd/yyyy)

This example illustrates a portion of the fields and controls on the Employment Eligibility Verification page, Supplement A, Preparer and/or Translator Certification for Section 1 (3 of 3). Although not shown here, you can add up to four preparers and/or translators.



Employees, preparers, or translators use this page to complete and submit the Section 1 information of the Form I-9 for the employee. Employees can complete and submit more than one Form I-9 but cannot modify the Form I-9 after submission and can view the most recent submission only.

Fields and links on this page are editable only when you are entering or completing a Form I-9. If the Form I-9 has been submitted into the system, this page is display only but contains a link to the I-9 instructions for the employee. However, if the form has already been completed and submitted, the page displays a **Select** button that you select to open up the fields and complete a new form.

Note: The information you enter on this page is for I-9 purposes only and does not update other HR data stored in the system.

Field or Control	*Description*
Start Over button	Select this button to clear all the fields on this page and start over.
Instructions link	Click this link to open a new browser window that contains a PDF of the instructions for completing the Form I-9.
Select	This button is available when you have already submitted I-9 verification data. Select this button to enable the page for data entry and submit a new Form I-9.

Section 1. Employee Information And Attestation

Use this section to enter the employee's name, address, birth date, U.S. social security number, and contact information.

Field or Control	***Description***
Other Last Names Used (if any)	Enter the maiden or other names, if applicable. When more than one name exists, separate the names by a semicolon (;).
Employee's E-mail Address and **Employee's Telephone Number**	Enter the appropriate contact information.
Citizenship or immigration status group box	Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option. Options are: 1. **A citizen of the United States**: Select this option if you are a citizen of the United States. 2. **A noncitizen national of the United States (See Instructions)**: Select this option if you are a noncitizen national of the United States. 3. **A lawful permanent resident**: Select this option if you are a conditional resident and have received legal permanent residency in the United States. By selecting this option, the **(Enter USCIS or A-Number.)** field within this group box becomes available for entry. 4. **A noncitizen (other than item Numbers 2. and 3. above) authorized to work until (exp. date, if any)**: Select this option when you are noncitizen but have been granted authorization to work in the United States and enter the date that your employment authorization expires, if any. By selecting this option, the remaining fields within this group box become available for entry. **Note:** Noncitizens authorized to work *must enter one* of the following to complete Section 1: 1. USCIS A-Number 2. Form I-94 Admission Number 3. Foreign Passport Number and the Country of Issuance

Field or Control	*Description*
(Enter USCIS or A-Number.)	Enter your lawful permanent resident number or USCIS number. This field is mandatory if you select the option stating that you are a lawful permanent resident.
until (expiration date, if applicable, mm/dd/yyyy) (month/day/year)	This field is available when you select that you are an noncitizen authorized to work. Enter the date until which you are authorized to work. There are certain types of work authorizations that do not expire - e. g. refugees or asylees. Therefore, if the expiration date does not apply, leave this field blank. **Note:** The printed form will display *N/A* in this field when the value is left blank.

Field or Control	*Description*
Signature of Employee	Select a signature type. Options include: • *<employee's name>*: The name is derived from the values entered in the Last Name, First Name, and Middle Initial fields. • *Minor Under Age 18* • *Special Placement*

Supplement A, Preparer and/or Translator Certification

The system requires this information only if you selected *Minor Under Age 18* or *Special Placement* in the **Signature of Employee** field.

Note: This section must be completed if any preparer and/or translator assists an employee in completing Section 1 of Form I-9. You can add up to four preparers and/or translators.

Field or Control	*Description*
Signature of Preparer of Translator	Enter the preparer's signature.
Last Name (Family Name) and **First Name (Given Name)**	Enter the preparer's first and last name in these fields. These fields are required.

Field or Control	*Description*
Address (Street Number and Name), City or Town, State, and **Zip Code**	Enter the preparer's address information in these fields. These fields are required.
Submit button	Select this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page. When you select this button, the system will prompt you to perform a check. Select **Yes** to perform the check.

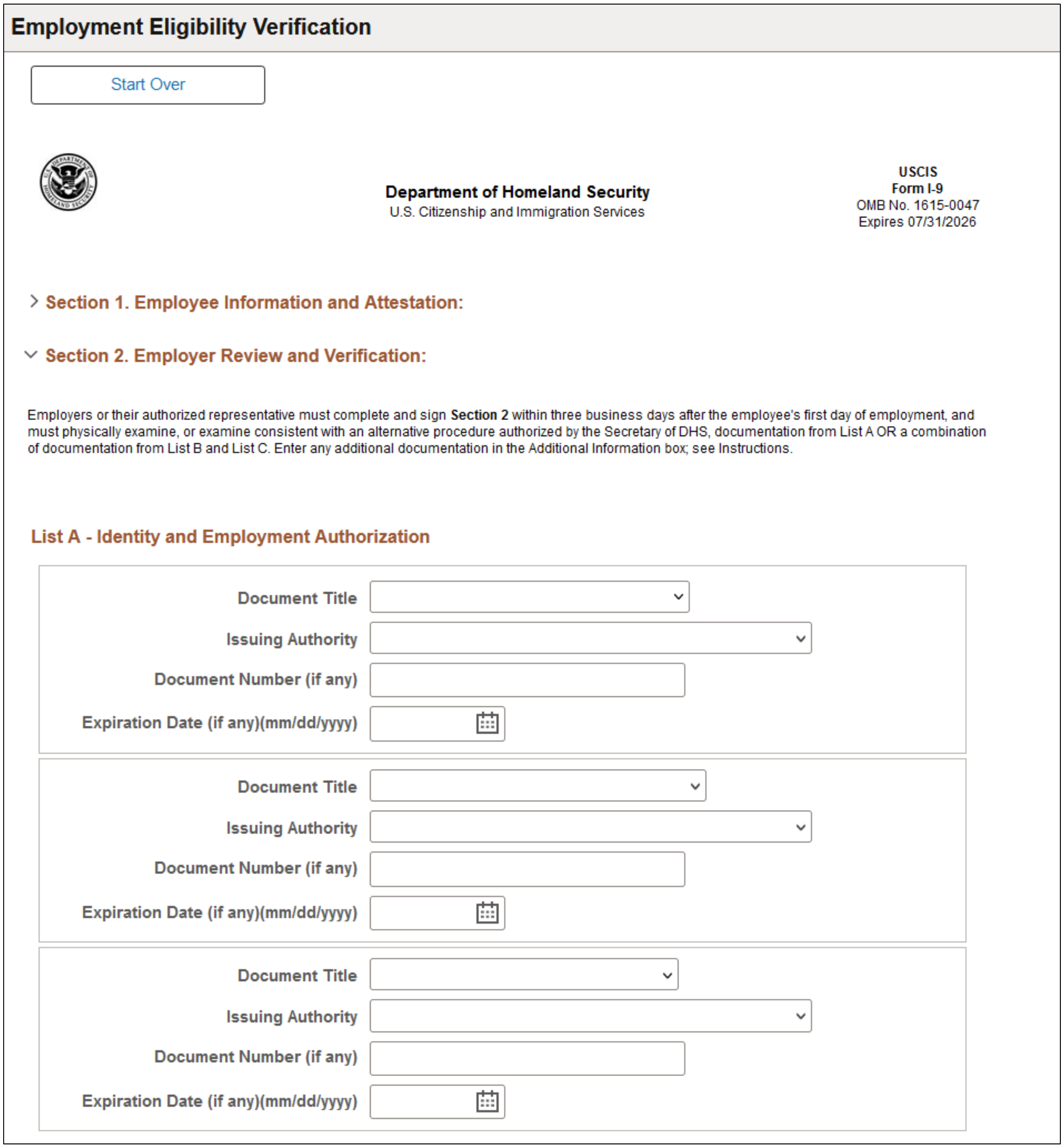
(Employer) Employment Eligibility Verification Page, Section 2. Employer Review and Verification

Employers use the Employment Eligibility Verification page (HR_I9_ADMIN_SEC2), Section 2 Employer Review and Verification portion to complete the confirmation of the Form I-9.

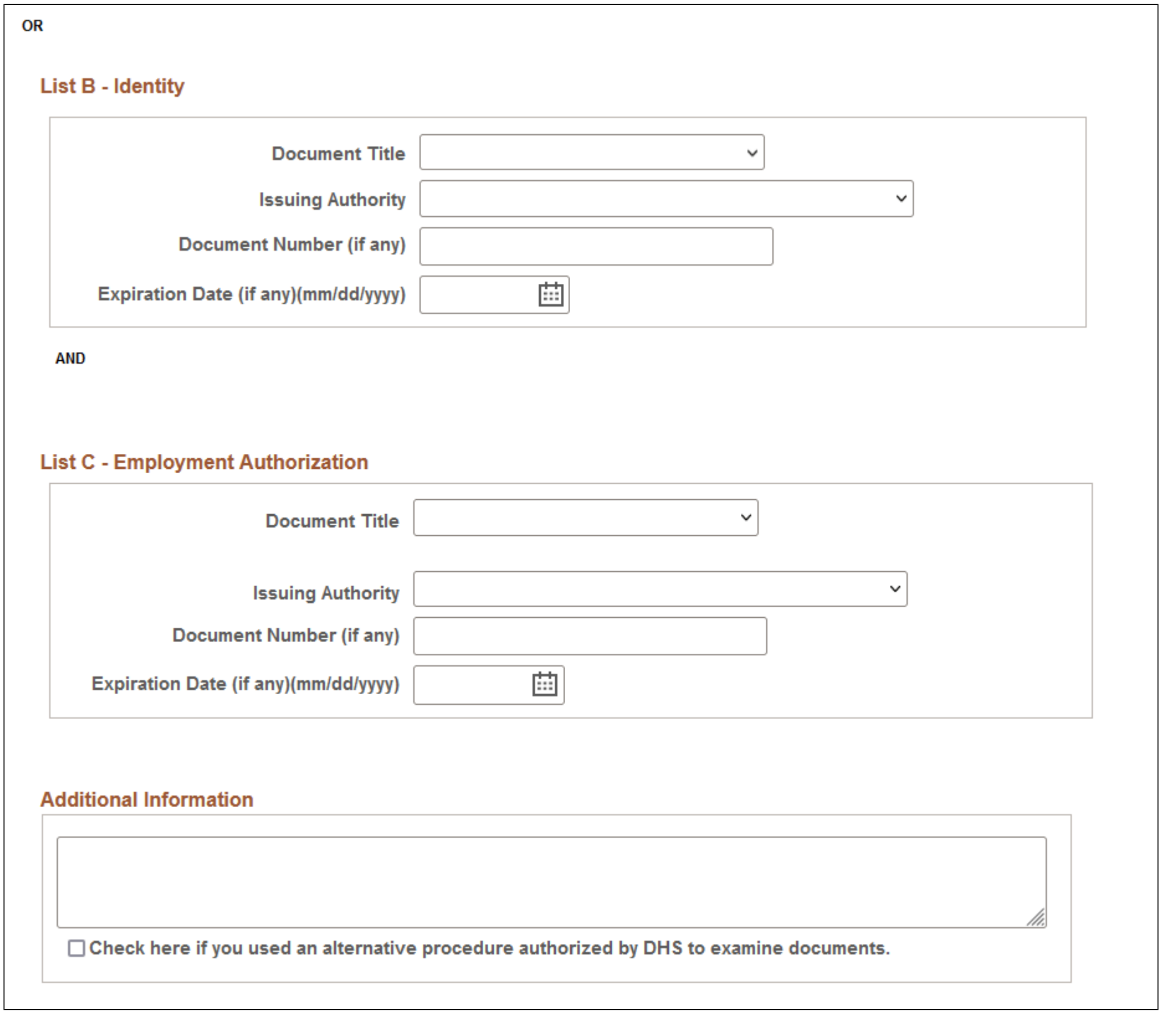
Navigation:

Workforce Administration > **Personal Information** > **Form I-9** > **Complete/Reverify Form I-9** > **Employment Eligibility Verification**

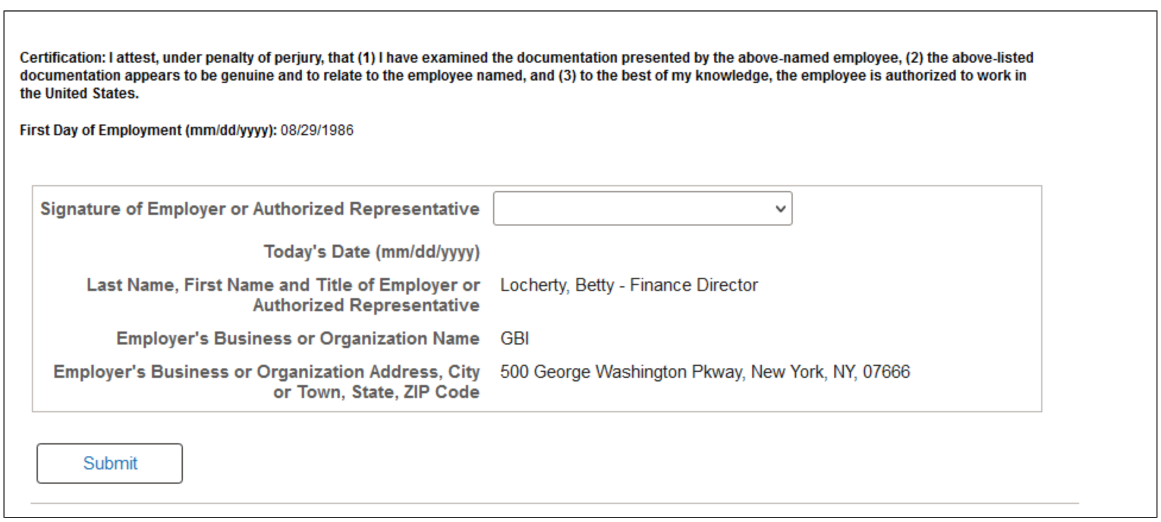
This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 2. Employer Review and Verification (1 of 3).



This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 2. Employer Review and Verification (2 of 3).



This example illustrates the fields and controls on the Employment Eligibility Verification page, Section 2. Employer Review and Verification (3 of 3).



Use this page to complete the employer sections after the employee, preparer, or translator has completed and submitted the Form I-9.

Field or Control	***Description***
Start Over	Select this button to clear all the editable fields on this page and start over.

Section 1. Employee Information and Attestation

This section displays the data entered and submitted by the employee, preparer, or translator on the (Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation. Expand or collapse this section to view or hide the information.

Section 2. Employer Review and Verification

The sections and fields that are available for entry correspond to the citizenship status and the minor and specials placement details selected by the employee on the form. The page populates the following fields based on the options selected by the employee:

- If the employee selected *Special Placement* for his or her signature, then the **List B – Identify** section has the field value of *Special Placement* in the **Document Title** field, and the **List C – Employment Authorization** section fields are available for entry.
- If the employee selected *Minor Under Age 18* for his or her signature, then the **List B – Identify** section has the field value of *Individual under age 18* in the **Document Title** field, and the **List C – Employment Authorization** section fields are available for entry.

The employer representative needs to complete one of the following options:

- **List A - Identity and Employment Authorization**
- **List B - Identity** AND **List C - Employment Authorization**

Field or Control	***Description***
Document Title	Record the type of documentation provided by the employee. There are separate fields for each document type (A, B and C).
Issuing Authority	Enter the name of the agency that issued the document.
Document Number (if any)	Enter the number of the actual document.
Expiration Date (if any) (mm/dd/yyyy)	(Optional) Record the expiration date, if any, of the document.
Additional Information	Record any additional information required to complete Section 2, or any updates that are necessary once Section 2 is complete.

Field or Control	Description
Check here if you used an alternative procedure authorized by DHS to examine documents.	Select this check box if you used an alternative procedure authorized by DHS to examine the documents.

Certification

Field or Control	Description
Signature of Employer or Authorized Representative	Select the name of the employer representative who is submitting the data. The drop-down value displays the name of the person logged into the system.
Last Name, First Name and Title of Employer or Authorized Representative	Displays the name and job title of the employer representative who is submitting the data.
Employer's Business or Organization Name	Displays the organization's name.
Employer's Business or Organization Address, City or Town, State, Zip Code	Displays the current organization's address.
Submit button	Select this button to save and submit the information you entered. When you select this button, the system will prompt you to perform a validation check. Select **Yes** to perform the check.

(Employer) Employment Eligibility Verification Page, Supplement B, Reverification and Rehire (formerly Section 3)

Employers use the Employment Eligibility Verification page (HR_I9_ADMIN_SEC2), Supplement B, Reverification and Rehire (formerly Section 3) portion to complete the confirmation of the Form I-9.

Navigation:

Workforce Administration > **Personal Information** > **Form I-9** > **Complete/Reverify Form I-9** > **Employment Eligibility Verification**

Use this page to complete the employer sections after the employee, preparer, or translator has completed and submitted the Form I-9.

Section 1. Employee Information and Attestation:

This section displays the data entered and submitted by the employee, preparer, or translator on the (Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation. Expand or collapse this section to view or hide the information.

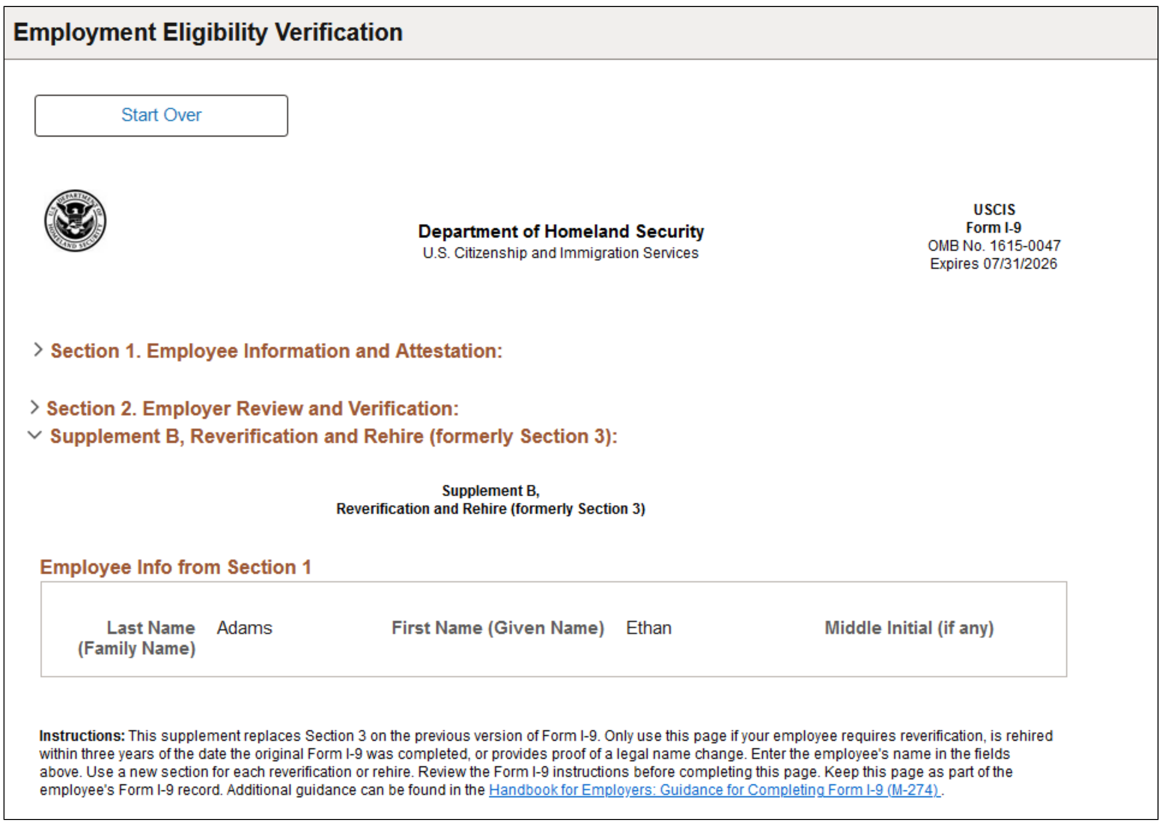
Section 2. Employer Review and Verification:

The (Employer) Employment Eligibility Verification Page, Section 2. Employer Review and Verification sections and fields that are available for entry correspond to the citizenship status and the minor and specials placement details selected by the employee on the form.

Supplement B, Reverification and Rehire (formerly Section 3)

This supplemental section is available when you have a rehire or a reverification and need to request that the employee submit a new form.

This example illustrates the fields and controls on the Employment Eligibility Verification page, Supplement B, Reverification and Rehire (formerly Section 3) (1 of 2).


Employment Eligibility Verification

Start Over

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 07/31/2026

Section 1. Employee Information and Attestation:

Section 2. Employer Review and Verification:

Supplement B, Reverification and Rehire (formerly Section 3):

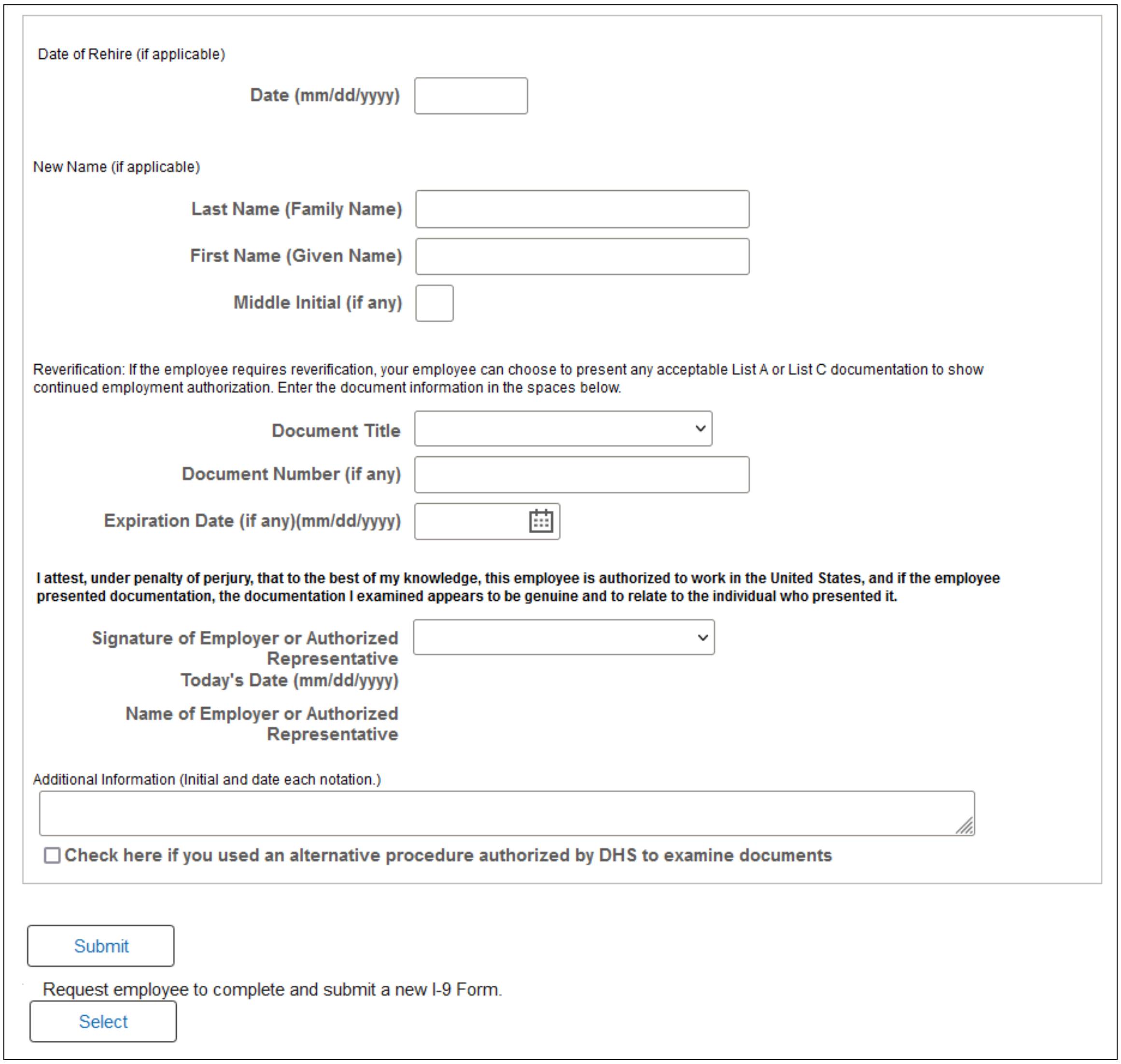
Supplement B,
Reverification and Rehire (formerly Section 3)

Employee Info from Section 1

Last Name (Family Name)	Adams	First Name (Given Name)	Ethan	Middle Initial (if any)

Instructions: This supplement replaces Section 3 on the previous version of Form I-9. Only use this page if your employee requires reverification, is rehired within three years of the date the original Form I-9 was completed, or provides proof of a legal name change. Enter the employee's name in the fields above. Use a new section for each reverification or rehire. Review the Form I-9 instructions before completing this page. Keep this page as part of the employee's Form I-9 record. Additional guidance can be found in the Handbook for Employers: Guidance for Completing Form I-9 (M-274) .

This example illustrates the fields and controls on the Employment Eligibility Verification page, Supplement B, Reverification and Rehire (formerly Section 3): (2 of 2). Although not shown here, you can add the following information up to three time online.



If an employee is rehired within three years of termination, or if the original document has expired, employers may reverify or update the original I-9 after it is submitted. A Form I-9 can only be updated or reverified one time.

If new information needs to be entered and actual documentation information already exists, all fields above this section will be display only and the employee and employer must complete a new Form I-9. The administrator can send an email notification to the employee requesting a new Form I-9 from this page. The administrator is able to view all forms completed by employees, including history.

Field or Control	***Description***
Date of Rehire (if applicable) (mm/dd/yyyy)	Displays the most current rehire date by default in this field.

Field or Control	***Description***
New Name (if applicable)	Displays the employee's current name if it is different from the name initially saved on the form.
Document Title	Enter the type of documentation being reverified or for the employee being rehired.
Document Number (if any)	Enter the number of the actual document.
Expiration Date (if any) (mm/dd/yyyy)	(Optional) Record the document expiration date, if any.
Signature of Employer or Authorized Representative	Select the signature of the employer or representative to confirm that the employee is authorized to work. The drop-down menu value displays the name of the person logged into the system.
Check here if you used an alternative procedure authorized by DHS to examine documents.	Select this check box if you used an alternative procedure authorized by DHS to examine the documents.
Submit	Select this button to save and submit the form.
Select	Select this button to send an email notification to the employee to request a new Form I-9.

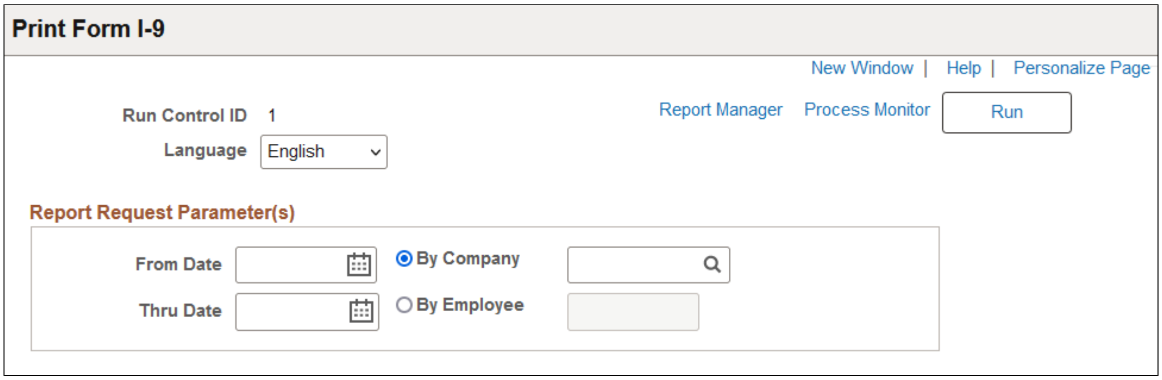
Print Form I-9 Page

Use the Print Form I-9 page (HR_RUNCTL_I9_FORM) to generate the Form I-9 in PDF format.

Navigation:

Workforce Administration > **Personal Information** > **Form I-9** > **Print Form I-9** > **Print Form I-9**

This example illustrates the fields and controls on the Print Form I-9 page.



Field or Control	Description
From Date and **Thru Date**	Use these fields to determine effective dates to extract when running the report. Both fields are required.
By Company or **By Employee**	Run the report using one of these options. Use the lookup icon to enter a company code or an employee ID.

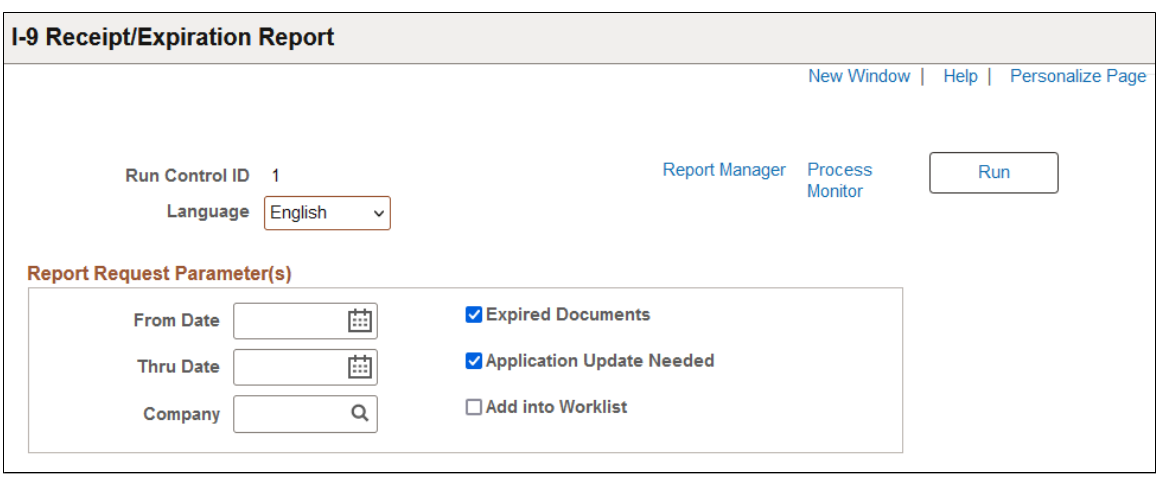
I-9 Receipt/Expiration Report Page

Use the I-9 Receipt/Expiration Report page (HR_RUNCTL_I9_VERFY) to identify I-9 forms that require re-verification and notify administrators.

Navigation:

Workforce Administration > **Personal Information** > **Form I-9** > **I-9 Receipt/Expiration Report** > **I-9 Receipt/Expiration Report**

This example illustrates the fields and controls on the I-9 Receipt/Expiration Report page.



Field or Control	*Description*
From Date and **Thru Date**	Use these fields to define the effective dates for the report. Both fields are required.
Company	This is an optional field. Entering a value will limit the report output to employees for a specific company as of the date that the employee submitted the Form I-9.
Expired Documents	Select this check box to have the report list Form I-9s with expiration dates within the specified date range.
Application Update Needed	Select to have the process find all documents that have a **Receipt** check box selected. The process compares the I-9 submission date with the date range and includes all employees whose I-9 date plus 90 days is within the date range.

Note: You must select either the **Expired Documents** or the **Application Update Needed** check box to run the report.

Field or Control	*Description*
Add into Worklist	Select this check box to have the administrator receive a worklist entry for each employee form listed in the report.

Archiving I-9 Data

See the product documentation for *PeopleTools: Data Management, "Using PeopleSoft Data Archive Manager."*

(USA) Determining U.S. Residency Status for Foreign Nationals

This topic discusses how to run the Substantial Presence test.

Page Used to Determine U.S. Residency Status for Foreign Nationals

Page Name	*Definition Name*	*Usage*
Employee Presence Test USA Page	PRESENCE_TEST	Run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

Employee Presence Test USA Page

Use the Employee Presence Test USA page (PRESENCE_TEST) to run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

Navigation:

Workforce Administration > **Personal Information** > **Citizenship** > **Employee Presence Test USA** > **Employee Presence Test USA**

This example illustrates the fields and controls on the Employee Presence Test USA page. You can find definitions for the fields and controls later on this page.

Under this test, a foreign national is considered a resident for tax purposes if the person is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Total Days Used in Presence Test = (Days Present in Calendar Year x 1) +(Days Present in First Prior Year x 0.333) + (Days Present in Second Prior Year x 0.166)

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that the nonresident alien must satisfy the Substantial Presence test in the year following the election.

Rules that govern which days don't count towards an employee's Substantial Presence test appear in the **Do not count days in which the employee was** group box. This test is only valid for current or previous years.

Calendar Information

Field or Control	***Description***
Calendar Year	Enter the appropriate calendar year.

Field or Control	*Description*
Days Present in Calendar Year, Days Present in First Prior Year, and **Days Present in Second Prior Year**	Enter the number of days present in the current year, the previous year, and the year previous to that. The actual days present in the first prior year equals 1/3 of the value in the **Days Present in First Prior Year** field. The actual days present in the second prior year equals 1/6 of the value in the **Days Present in Second Prior Year** field. For example, enter the number of days present in 2014, followed by the number of days present in 2013, followed by the number of days present in 2012. The **Total Days Used in Presence Test** field automatically displays the total number of days after all of the previous fields are completed. **Note:** If you are entering Substantial Presence test information for multiple years, the **First Prior Year** and **Second Prior Year** fields are based on the prior year information.

Visa Information

If the employee has a visa or permit, this group box provides information about the visa or permit.

Substantial Presence Test

Field or Control	*Description*
Alien Registration "Green" Card	Select if the employee has been issued an alien registration card, or green card. If you select this check box, the Substantial Presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.
31 Days in Calendar Year	This check box is automatically selected if the employee has been present 31 days in a calendar year.
Perform Presence Test	Click to see if the employee passed the Substantial Presence test. The system calculates the total number of days present and selects either the **Passed 183 Day Test** or **Did Not Pass 183 Day Test** option. In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

Chapter 18

(BEL) Entering Additional Data for Belgian Workers

Tracking Claeys Formula Calculations

To track Claeys formula calculations, use the Define Contract End BEL (END_CONT_TBL_BEL), Define Contract End Reason BEL (REAS_END_TBL_BEL), Statute Table (STATUTE_TBL_BEL), Reduced Charged Table (RED_CHRG_TBL_BEL), RSZ Categories (CONTR_RSZS_BEL), Terminate Contract BEL (CONTRACT_END_BEL), and Replace Contract BEL (CONTRACT_REPL_BEL) components.

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract, and for the special reasons that are associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys formula calculations. Employers use the Claeys formula to calculate the cost of terminating a worker's contract based on number of service years, salary, age, seniority, type of employment contract, and so on.

These topics discuss tracking Claeys formula calculations.

Pages Used to Track Claeys Formula Calculations

Page Name	***Definition Name***	***Usage***
Define Contract End BEL Page	CNT_END_TBL_BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts.
Define Contract End Reason BEL Page	CNT_ENDRSN_TBL_BEL	Define the reasons that are associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.
Statutes Page	STATUTE_TBL_BEL	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.

Page Name	Definition Name	Usage
Reduced Charges Page	RED_CHRG_TBL_BEL	Set up the page that you use to update or add reduced charges job categories. Under Belgian employment law, these are job categories that enable you to pay reduced taxes and premiums on the compensation to workers who hold those jobs.
RSZ Categories Page	CNT_RSZS_TBL_BEL	Link contract statutes to Rijksdienst Sociale Zekerheid (RSZ) categories.
Terminate Contract BEL Page	CONTRACT_END_BEL	Record information that is necessary for terminating a Belgian worker.
Replace Contract BEL Page	CONTRACT_REPL_BEL	Enter the person who replaces the worker in the employment contract.

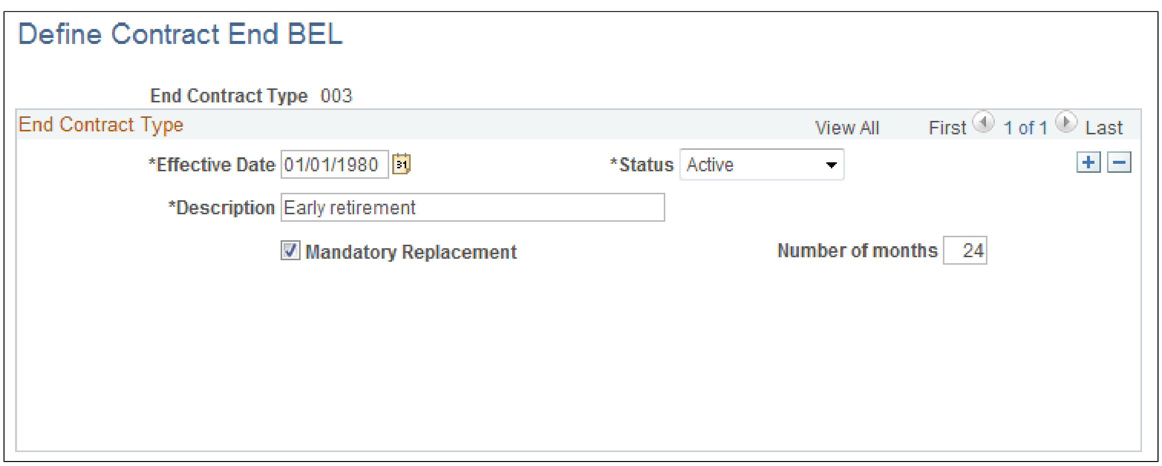
Define Contract End BEL Page

Use the Define Contract End BEL page (CNT_END_TBL_BEL) to enter or update codes for events and conditions that could result in the termination of employment contracts.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Workforce Data BEL** > **Contract End Types** > **Define Contract End BEL**
- **Workforce Administration** > **Job Information** > **Contract Administration** > **Define Contract End BEL**

This example illustrates the fields and controls on the Define Contract End BEL page. You can find definitions for the fields and controls later on this page.



The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

Field or Control	***Description***
Mandatory Replacement	Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.
Number of months	If you selected **Mandatory Replacement,** enter the period of time (in months) required to position the replacement. **Note:** Belgian employment law mandates these requirements.

Define Contract End Reason BEL Page

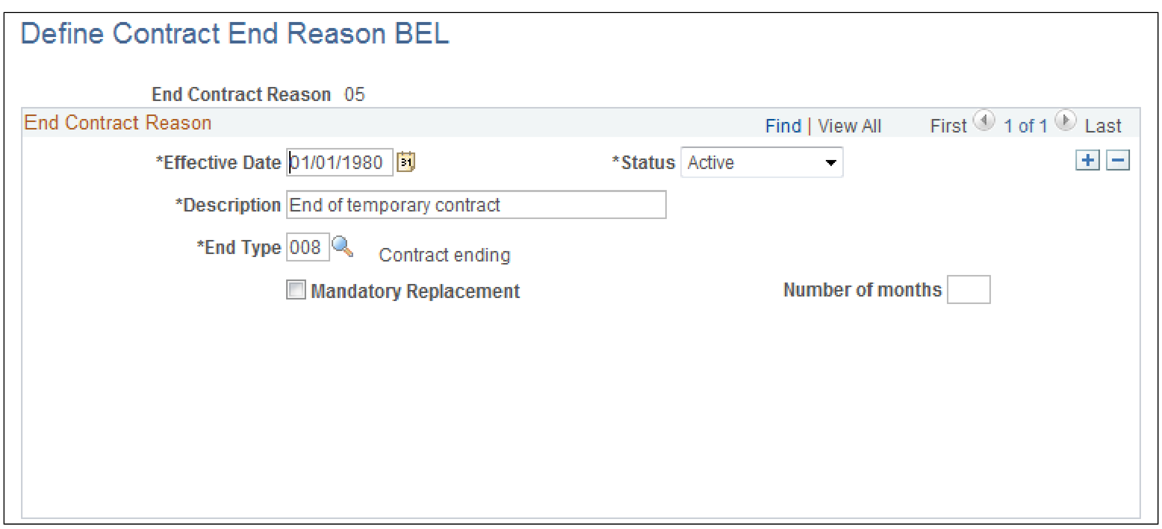
Use the Define Contract End Reason BEL page (CNT_ENDRSN_TBL_BEL) to define the reasons that are associated with event codes by adding or updating employment termination reason codes.

First define contract termination event types.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Administration** > **Workforce Data BEL** > **Contract End Reasons**
- **Workforce Administration** > **Job Information** > **Contract Administration** > **Define Contract End Reason BEL** > **Define Contract End Reason BEL**

This example illustrates the fields and controls on the Define Contract End Reason BEL page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
End Type	Select an end type from the list of end contract type codes that were entered on the Define Contract End BEL page. **Note:** If you move out of the **End Type** field and then decide to change the end type code, deselect and reenter the **Mandatory Replacement** and **Number of months** fields.
Mandatory Replacement and **Number of months**	If you selected an end type that requires mandatory replacement, when you move out of the **End Type** field, the system automatically selects this check box. The system then enters the number of months that you have to replace the current employee with another employee in this contract. If you didn't select an end type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee. **Note:** Belgian employment law mandates these requirements.

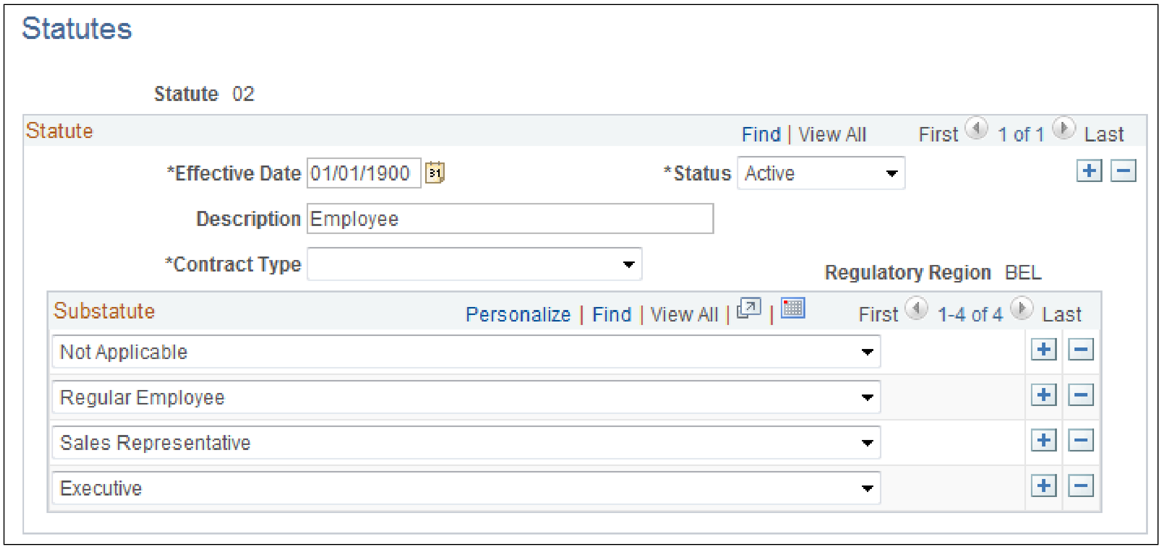
Statutes Page

Use the Statutes page (STATUTE_TBL_BEL) to set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BEL** > **Identify Statutes** > **Statutes**

This example illustrates the fields and controls on the Statutes page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Contract Type	Select a contract type for the statute. Values are *Employment, Member of the professions, Non applicable,* and *Self Employed.*
Substatute	Select the statute code with which the system should associate this substatute code.

RSZ Categories Page

Use the RSZ Categories page (CNT_RSZS_TBL_BEL) to link contract statutes to Rijksdienst Sociale Zekerheid (RSZ) categories.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BEL** > **Identify RSZ Categories** > **RSZ Categories**

This example illustrates the fields and controls on the RSZ Categories page. You can find definitions for the fields and controls later on this page.

Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys formula calculations.

Field or Control	***Description***
RSZ-Submitted	Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) that is associated with this contract.
RSZ-Category	Select an RSZ category from the list.

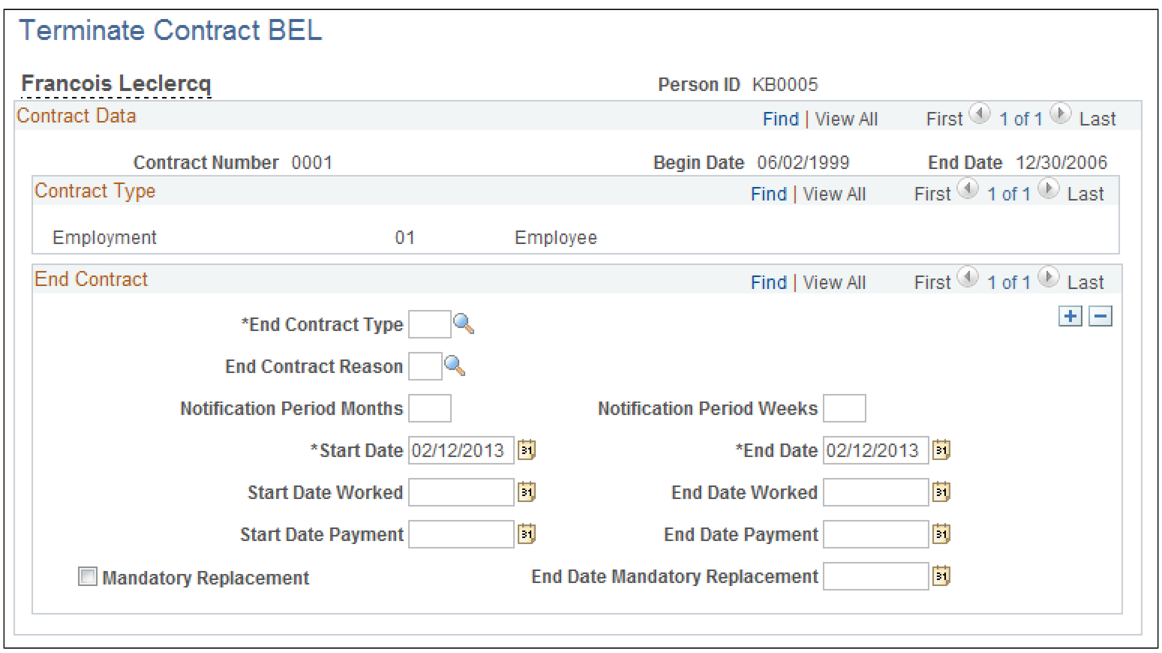
Terminate Contract BEL Page

Use the Terminate Contract BEL page (CONTRACT_END_BEL) to record information that is necessary for terminating a Belgian worker.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Terminate Contract BEL** > **Terminate Contract BEL**

This example illustrates the fields and controls on the Terminate Contract BEL page. You can find definitions for the fields and controls later on this page.



Use this page to:

- Specify that the worker's employment contract has ended, and the reason that your organization has chosen to end the contract.

- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

Field or Control	***Description***
End Contract Type	Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).
End Contract Reason	Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).
Notification Period Months	Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component. When you enter an amount here and move out of the field, the **End Date** field value adjusts accordingly.
Notification Period Weeks	Enter the number of weeks of notice that the employee must be given before the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component. When you enter an amount here and move out of the field, the **End Date** field value adjusts accordingly.
Start Date and**End Date**	Enter the date that the notification period begins, and the date on which the notification period ends and the employment contract terminates. The Start Date defaults to the next up-coming Monday and the end date is calculated from the values entered in the **Notification Period Months** and **Notification Period Weeks** values. You can overwrite these dates.
Start Date Worked	Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.
End Date Worked	Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and **End Date Payment**	Track the start and end payment dates, which the system stores and uses for payroll.

Field or Control	***Description***
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it display-only. Specify whether an end contract type requires replacement on the Define Contract End BEL page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

Related Links

Define Contract End Reason BEL Page

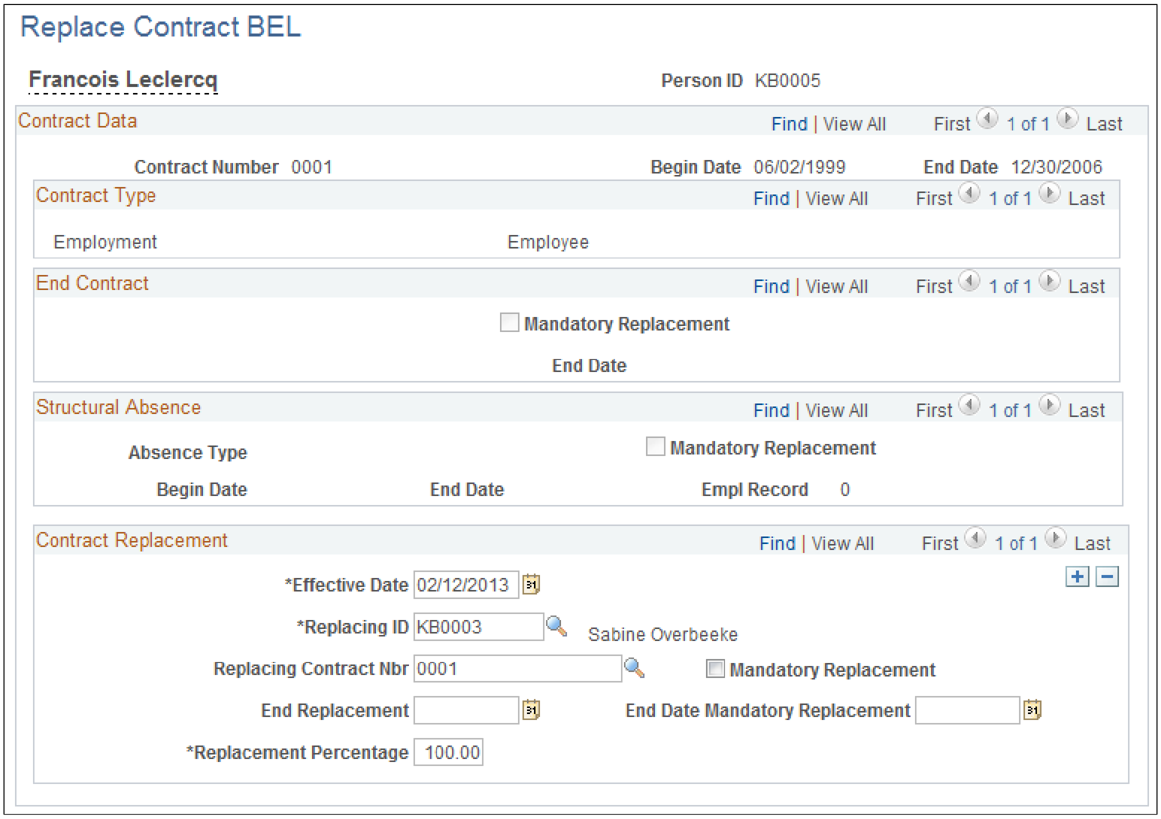
Replace Contract BEL Page

Use the Replace Contract BEL page (CONTRACT_REPL_BEL) to enter the person who replaces the worker in the employment contract.

Navigation:

Workforce Administration > **Job Information** > **Contract Administration** > **Replace Contract BEL** > **Replace Contract BEL**

This example illustrates the fields and controls on the Replace Contract BEL page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Replacing ID	Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to start someone's employment as a replacing employee, you must create employment terms for that person first.
Replacing Contract Nbr (replacing contract number)	Select the number for this contract, based on the replacing employee ID that you selected.
Mandatory Replacement	Select to indicate that mandatory replacement is required.
End Replacement	If you selected **Mandatory Replacement,** enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract.
End Date Mandatory Replacement	Enter the end date for mandatory replacement.

Preparing for Severance Calculations

Employers in Belgium and organizations that employ a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula considers factors such as the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

These topics provide overviews of how Claeys calculates severance and of how to prepare for the Claeys calculation, and discuss preparing for severance calculations.

Pages Used to Prepare for Severance Calculations

Page Name	***Definition Name***	***Usage***
Identify Seniority Page	SENIORITY_BEL	Track additional seniority for an employee. Seniority affects the Claeys calculation that you perform in the Create Notification component.
Create Protection Page	PROTECT_BEL	Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Related Links

Performing the Claeys Calculation

Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary that are owed to an employee as follows:

0.89 × (seniority) + 0.08 × (employee's age) + 0.0013 × [yearly compensation in EUR divided by 1000 × (reference index divided by actual index)] − 2 = notification period, or months of severance salary that is owed to the employee.

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82.500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

0.89 × 13 = 11.57 (seniority factor)

0.08 × 38 = 3.04 (age factor)

0.0013 × (82,500 / 1000) × (125.30 / 126.00) = .1066 (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + .1066 (compensation factor) 2 = 13 months of severance

Note: The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor that is designated in the company table for your organization. The Belgian regulated factor amount is approximately 13.9.

Understanding How to Prepare for the Claeys Calculation

Preparing for the Claeys employment compensation calculation in PeopleSoft Human Resources involves:

- Establishing default company level information that is used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

  You can override this data at the employee level in the Create Notification component, where you perform the Claeys calculation for a specific worker.
- Entering and maintaining information about the employee's:
  - Seniority with your organization (stored in the PER_ORG_ASGN table).
  - Age (stored in the PERSON table).
  - Compensation (stored in the JOB table).
- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored in the CONTRACT_DATA table).
- Entering and maintaining end employment terms information about required notification periods for workers your company may terminate (stored in the CNT_END_TBL_BEL table).
- Maintaining additional information that is used to record Belgian seniority, including protected job leave information (stored in the SENIORITY_BEL table).

Related Links

Performing the Claeys Calculation

Identify Seniority Page

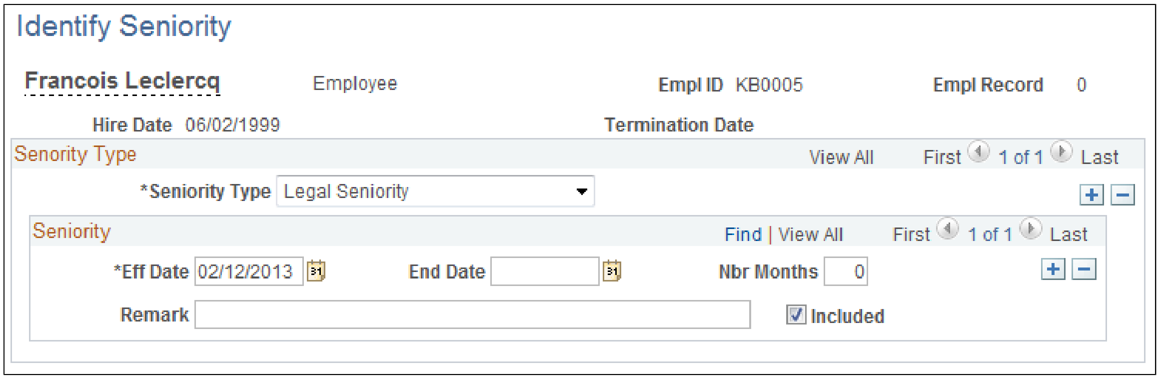
Use the Identify Seniority page (SENIORITY_BEL) to track additional seniority for an employee.

Seniority affects the Claeys calculation that you perform in the Create Notification component.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Identify Employee Seniority** > **Identify Seniority**

This example illustrates the fields and controls on the Identify Seniority page. You can find definitions for the fields and controls later on this page.



The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no information about service months is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it does count towards legal seniority, which affects the Claeys calculation. This distinction is particularly important in the case of mergers between organizations, where you decide if the seniority of employees from one organization is recognized by the other organization and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

Field or Control	***Description***
Seniority Type	Select the seniority type method that you want to use to determine this employee's seniority in your organization. Values are: *Company Seniority:* When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on. The system does *not* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record. *Legal Seniority:* The system accounts for this seniority amount when calculating the Claeys formula, which is used to calculate base pay for Belgian employees. If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the **Nbr Months** field and adds it to the months of service from the employee's Job Data record, and displays the sum of the two amounts on the Create Notification - Base page.

Field or Control	***Description***
Eff Date (effective date)	Enter the effective date to record the beginning of the employee's additional seniority period. The system supplies a default date, usually today's date, which you can modify to reflect the additional seniority period.
End Date	Enter the end date for the seniority period.
Nbr Months (number of months)	When you move out of the **End Date** field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates *100* months of seniority.
Included	Select to ensure that the system adds the months of seniority that you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you deselect this check box and enter *Legal Seniority* months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.
Remark	Enter relevant remarks about the additional seniority that you are tracking.

Create Protection Page

Use the Create Protection page (PROTECT_BEL) to enter protected job leave information for a Belgian employee.

You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Create Protected Absence** > **Create Protection**

This example illustrates the fields and controls on the Create Protection page. You can find definitions for the fields and controls later on this page.

Field or Control	*Description*
Protection Type	Select a protection type to indicate why this leave of absence is protected. **Note:** Belgian employment law mandates these protection types.
End Date	Enter the date on which the employee will return to work.
Nbr Months (number of months)	When you move out of the **End Date** field, the system calculates the duration of the protected absence. **Note:** The system calculates the absence period only to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note: The system does *not* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might affect seniority months.

Performing the Claeys Calculation

After you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee.

These topics discuss performing the Claeys calculation.

Pages Used to Perform the Claeys Calculation

Page Name	*Definition Name*	*Usage*
Create Notification - Base Page	NOTIF_CALC_BEL	Review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service.
Create Notification - Results page	NOTIF_CALC2_BEL	Calculate the severance amount.
Create Notification - Report Page	RUNCTL_PER066_BEL	Run the Notifications report (PER066BE).

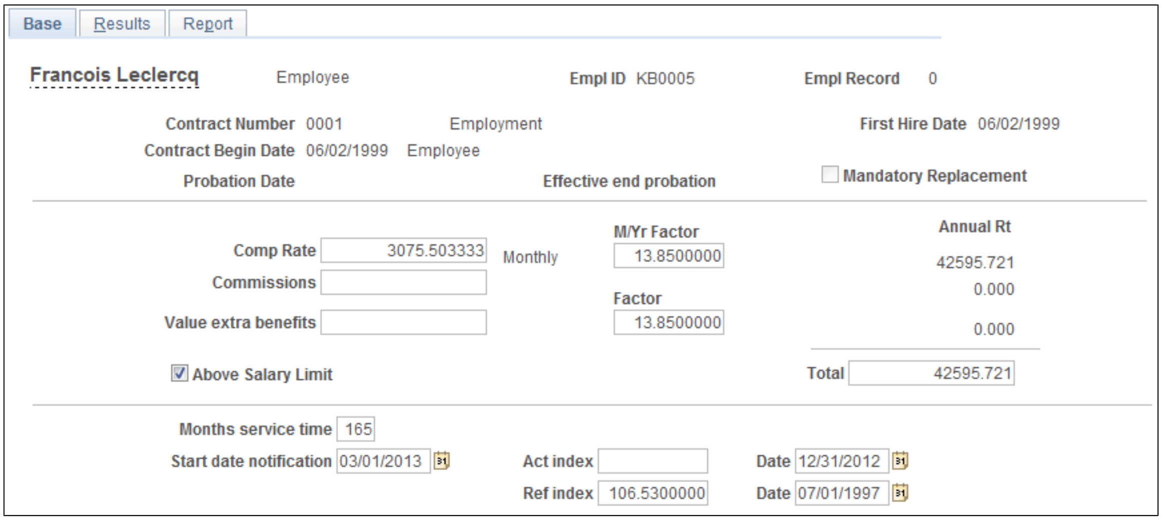
Create Notification - Base Page

Use the Base page (NOTIF_CALC_BEL) to review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Create Notification** > **Base**

This example illustrates the fields and controls on the Create Notification - Base page. You can find definitions for the fields and controls later on this page.



The system displays the employee's name, employee ID, and the employment record number for your reference. This information comes from the person's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and Terminate Contract BEL pages. The system displays the person's hire date from the Job Data record and indicates whether, according to the end employment terms for the worker, the contract requires mandatory replacement.

Determining the Employee's Base Compensation Amount (Jaarloon)

Field or Control	***Description***
Comp Rate (compensation rate)	The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.

Field or Control	***Description***
M/Yr Factor (month/year factor)	The system multiplies the month base amount by the month/year factor of *13.85000* to calculate a value for the employee's **Annual Rt** (annual rate) income amount field. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.
Commissions	Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.
Value extra benefits	Add value extra benefits amounts, including other components of nonbase pay, such as any benefits that the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the value extra benefits amount by the value extra month/year factor of *13.85000* to calculate the employee's yearly extra income amount.
Total	The system displays the total compensation amount (jaarloon) based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Field or Control	***Description***
Above sal. limit (above salary limit)	The system indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page. To change the salary limit setting, ensure that the notification period start date falls *after* the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (the system uses the factors in the **Claeys Defaults** group box on the Create Notification - Results page to calculate the notification period, and makes the factors available for entry). If the date is *before* the effective end probation date, you can't change the salary limit setting.

Note: The compensation currency on the Create Notification - Base and Create Notification - Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Determining the Employee's Seniority

Field or Control	***Description***
Months service time	The system calculates and displays the employee's number of months service time. The system determines service month information by considering both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page (SENIORITY_BEL) *if* the seniority type is set to *Legal Seniority.* The system adds the two seniority amounts and displays them as the months service time amount. The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays *9* as the employee's months service time. Adjust the months service time as necessary. **Note:** If you enter seniority information on the Seniority page for an employee and the seniority type is set to *Company Seniority,* the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

Field or Control	*Description*
Start date notification period	Set the start date notification period for the employee's termination notification to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page. For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary. **Note:** The start date notification period that appears on the Base page affects the way the system performs the Claeys calculation on the Results page. If the start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the **Calculation** button. If you enter a start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days*, *Weeks*, or *Months*, depending on the statute information for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks*. The classification of *Employee* results in a notification period of *Months*. The classification of *Not Applicable* results in a notification period of *Days*.
Act. Index (actual index)	The actual index if one is assigned for this company in the Company table. The actual index is a monthly reference number to be held against the reference index number. The actual index is used in the Claeys calculation to calculate the notification period term that is related to the yearly base on the Create Notification - Results page: (Yearly base salary / 1000) × (factor yearly base / actual index) × correction factor)
Date	The last day of the year preceding the year in which you're performing the Claeys calculation for an employee. This date is for your reference only, and isn't saved when you save the page.

Field or Control	*Description*
Ref. Index (reference index)	You can also update the reference index or accept the system default that is based on the factor yearly base index that is set up on the Company Table- Default Settings, Claeys Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.
Date	The system also displays the reference index date. The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

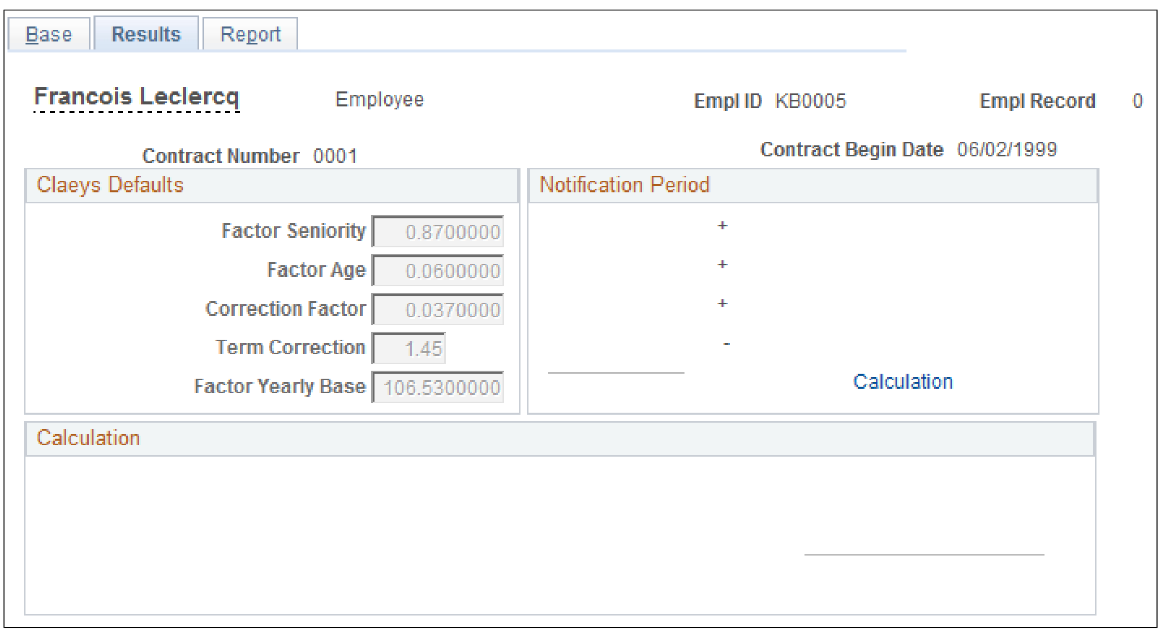
Create Notification - Results page

Use the Results page (NOTIF_CALC2_BEL) to calculate the severance amount.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Create Notification** > **Results**

This example illustrates the fields and controls on the Create Notification - Results page. You can find definitions for the fields and controls later on this page.



The system displays the Claeys defaults for **Factor Seniority, Factor Age, Correction Factor, Term Correction,** and **Factor Yearly Base** from the Company table for this employee's company. You assigned the company on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the **Above sal. limit** check box on the Create Notification - Base page.

Note: The system uses these Claeys default factors as part of the Claeys calculation only when the **Above sal. limit** check box is selected on the Create Notification - Base page.

When you first open this page, the **Notification Period** and **Calculation** group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by selecting the **Calculation** link.

The system displays the calculated notification period for this employee in the **Calculation** group box and shows how it calculated the notification period in the **Notification period** group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* **(Sal limit** check box selected), the notification period that appears in the **Calculation** group box is based on the calculations that appear in the **Notification Period** group box.

  The system calculates the notification period based on the employee's seniority, age, and compensation:

  Seniority term = (months service time / 12) × factor seniority

  Note: For the Seniority Term amount, the system rounds the division by 12 differently for each month.

  Age term = employee's age on notification start date × factor age.

  Compensation term = (base total / 1000) × (factor yearly base / actual index) × correction factor.

  Total notification period = seniority term + age term + compensation term - term correction.

  You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the notification period calculation in the **Notification Period** group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't above the salary limit (the **Above sal. limit** check box is deselected), the notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

  ```
  If the Statute is "Worker"

  if Notification Start Date <= Effective Probation End Date, then Period is "0"⇒

  if the Service Time is lower than 240 Months (20 years) the Period is "4"

  else the Period is "8"

  If the Statute is "Employee"

  if Notification Start Date <= Effective Probation End Date, then Period is "7"⇒
  ```



```
else the Period is (((Service Time / 12) / 5) +1) ×3 (each division is truncat⇒
ed with zero decimals)
Else the Period is "0"
```

The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker,* the period unit is in *Weeks.* When the statute is for an *Employee,* then the period unit is in *Months.* If the statute is anything other than worker or employee, the period unit is *Days.* Whenever the notification start date falls within the probation period, the unit of time is always *Days.*

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Create Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the value for the **Protection period** field. This method of comparison ensures that the employer respects the employee's protection rights.

Note: The protection period isn't included in the Claeys calculation process.

The system also displays the **Protection End Date** field, which is the *actual* end date of the protection period if any protected leave time is entered for this employee on the Create Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Create Protection page.

Working with the End Compensation Amount

The **End compensation** field displays the resulting Claeys calculation amount that you owe this employee as severance pay, as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Guido Peeters is:

(31576.25 / 12) * 11 = 28944.89

Any amount that you enter in the **Revenue compensation** field is added to the total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the **Calculation** link again. The system deselects the old results and calculates the Claeys amount based on your changes.

Warning! The system does not save this data. You must run the Notification report to maintain records for each calculation.

Create Notification - Report Page

Use the Report page (RUNCTL_PER066_BEL) to run the Notifications report (PER066BE).

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Create Notification** > **Report**

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and record number together with the notification period that is calculated by the Claeys formula.

Related Links

“(BEL) Company Table - BEL page” (Application Fundamentals)

Setting Up and Generating DIMONA Notifications

To set up DIMONA Notification data, use the Online Processing Setup BEL (HR_PRCS_SETUP_BEL), DIMONA Sender Setup BEL (HR_DI_SENDER_BEL), and DIMONA Event Type BEL (HR_DI_EVT_TYP_BEL) components.

These topics provide an overview of DIMONA notifications and discuss setting up and generating DIMONA notifications.

Pages Used to Generate DIMONA Notifications

Page Name	***Definition Name***	***Usage***
Online Processing Setup BEL - Online Processing Setup Page	HR_PRCS_SETUP_BEL	Set up properties for HR Belgium processes.
HR Belgium Process Setup Page	HR_PROP_LONG_BEL	Create, modify, or view long property values. This page enables you to give an explanation of the property or assign a long value as property to a process parameter, like a URL for example.
DIMONA Sender Setup Page	HR_DI_SENDER_BEL	Identify sender IDs and addresses for the DIMONA declaration process.
DIMONA Event Type Page	HR_DI_EVT_TYP_BEL	Define event types for the HR Belgium DIMONA declaration.
Create DIMONA Notification Page	HR_DIMONA_CNTL_BEL	Create DIMONA notifications as a flat file. This is an older version of the notification process.

Page Name	***Definition Name***	***Usage***
Review New DIMONA Results Page	HR_DIMONA_RVW_BEL	Review DIMONA notifications that were created as a flat file using the older Create DIMONA Notifications process. This is an older version of the DIMONA notification review.
New DIMONA Notification Page	HR_DI_RUNCTL_BEL	Create new DIMONA XML notifications.
DIMONA Result Page	HR_DI_RVW1_BEL	Review new DIMONA results.
DIMONA Result Details Page	HR_DI_RSLT_SEC_BEL	View additional data regarding the DIMONA process.
Load DIMONA Notification Page	HR_DI_LOAD_BEL	Load DIMONA notification.
DIMONA Error Details Page	HR_DI_LOAD_SEC_BEL	View error details from the DIMONA load process.

Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA notifications contain the required data.

The DIMONA Declaration process (HR_DI_BEL) creates the mandatory xml format file and is initiated from the New DIMONA Notification page. The PeopleSoft system supports employee start and end of employment DIMONA notifications, which are based on the actions and action reasons selected in the setup, including corresponding updates and cancellations. You can also create you own DIMONA notifications based off of the actions or action reasons selected in the setup. You can generate notifications for a single employee, for a company, or for a business unit.

Note: A previous version of the DIMONA notification generation, the Create DIMONA Notification process (HRBEL_DIM_AE), generates DIMONA notifications as flat files and uses hardcoded actions.

After you have generated files containing the notifications, you can transfer the files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS file transfer protocol server. After you transfer data to the NOSS, you can consult and update employee data by using the NOSS database system.

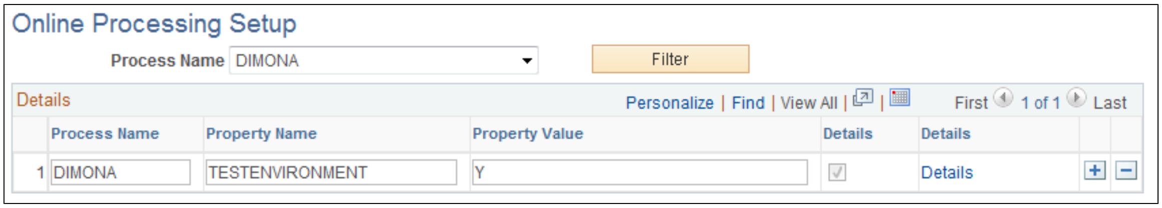
Online Processing Setup BEL - Online Processing Setup Page

Use the Online Processing Setup page (HR_PRCS_SETUP_BEL) to set up properties for HR Belgium processes.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data BEL > Online Processing Setup > Online Processing Setup

This example illustrates the fields and controls on the Online Processing Setup page. You can find definitions for the fields and controls later on this page.



Add, modify, or view variables for DIMONA or other Belgium processes.

The PeopleSoft HR application delivers the *DIMONA* process name to set your system as a test environment. This enables you to set the system environment to be in test or final production mode while running DIMONA notifications.

Field or Control	***Description***
Property Value	Enter values pertaining to the process. For the *DIMONA* process, specify whether your environment is in test or final production mode. Valid values are *Y* (Test mode) and *N* (Production mode). Test environments set as *N* are for final generation and will be sent to social security. The DIMONA Declaration process will place either a *T* = Test (data) or an *R* = Real (data) in position 31 of the DIMONA filename based on the production mode. See New DIMONA Notification Page.
Details	This check box displays whether there is additional information regarding this process name. Click the Details link to open the HR Belgium Process Setup page and manage long property value information.

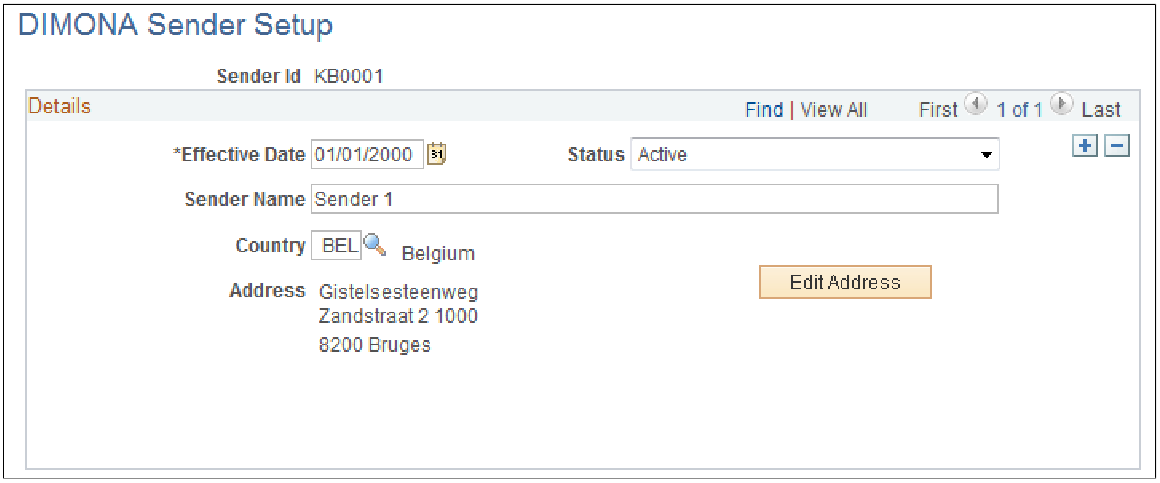
DIMONA Sender Setup Page

Use the DIMONA Sender Setup page (HR_DI_SENDER_BEL) to identify sender IDs and addresses for the DIMONA declaration process.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data BEL > DIMONA Sender Setup > DIMONA Sender Setup

This example illustrates the fields and controls on the DIMONA Sender Setup page. You can find definitions for the fields and controls later on this page.



Use this page to maintain sender address information. When an user enters a sender number on the New DIMONA Notification run control page the page will display the associated address for this sender.

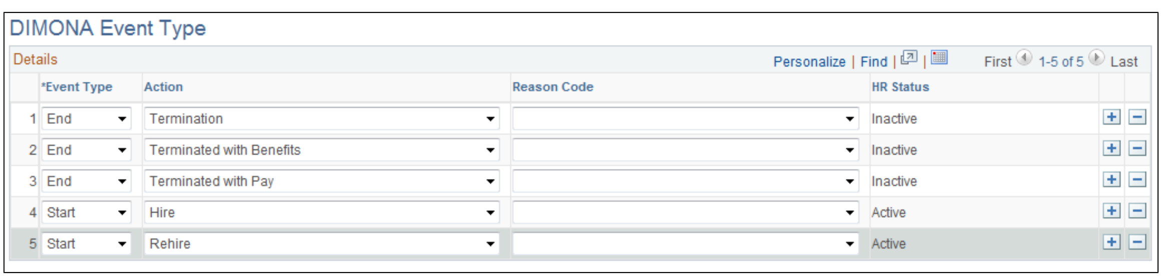
DIMONA Event Type Page

Use the DIMONA Event Type page (HR_DI_EVT_TYP_BEL) to define event types for the HR Belgium DIMONA declaration.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data BEL** > **DIMONA Event Type BEL** > **DIMONA Event Type BEL**

This example illustrates the fields and controls on the DIMONA Event Type page. You can find definitions for the fields and controls later on this page.



Use this page to define and maintain HR actions and reasons that the New DIMONA Notification process should select from HR Job Data. For example, if you indicate a *Hire* **Action** value with the **Reason Code** value of *First Job,* the process will select only employee job data that have an action of *Hire* and a reason of *First Job.* If the **Reason Code** field is left blank, the process will select all employee job data with the action *Hire,* regardless of the reason code.

The PeopleSoft HR system delivers this event types:

Event Type	***Action***	***Reason Code***	***HR Status***
Start (start of employment)	*Hire* (HIR)	N/A	*Active*
Start	*Rehire* (REH)	N/A	*Active*
End (end of employment)	*Termination* (TER)	N/A	*Inactive*
End	*Terminated with Benefits* (TWB)	N/A	*Inactive*
End	*Terminated with Pay* (TWP)	N/A	*Inactive*

Note: N/A indicates that there is now action reason associated with the action.

See Review New DIMONA Results Page.

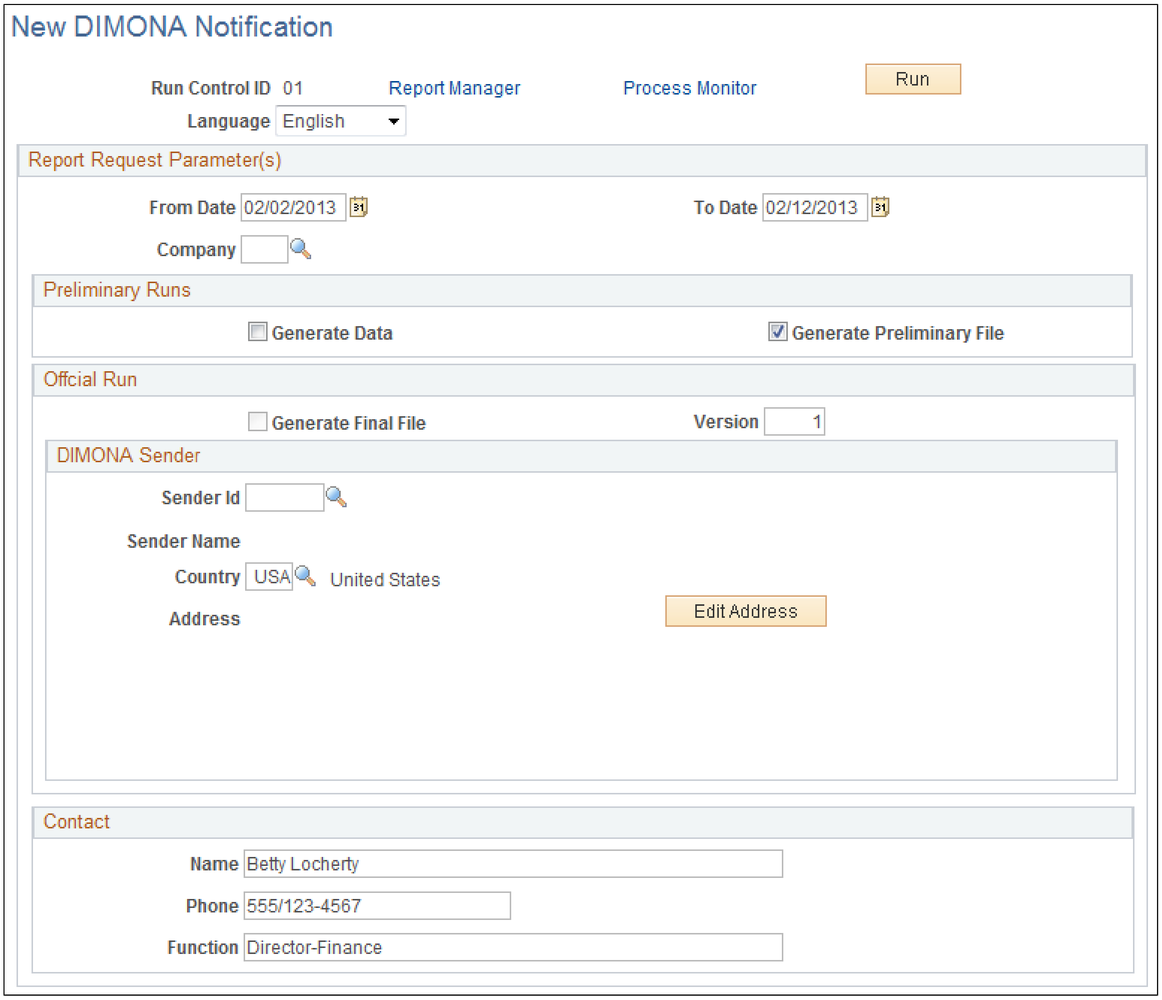
New DIMONA Notification Page

Use the New DIMONA Notification page (HR_DI_RUNCTL_BEL) to create new DIMONA XML notifications.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **New DIMONA Notification** > **New DIMONA Notification**

This example illustrates the fields and controls on the New DIMONA Notification page. You can find definitions for the fields and controls later on this page.



Report Request Parameter(s)

Field or Control	***Description***
From Date and **To Date**	Enter a date range for the period you want to include in the DIMONA notification. The process will select the data between these dates. The **From Date** field displays by default a date 10 days prior to the system's date. The **To Date** field displays by default the system date.
Company	Enter the company or business unit for which to create a DIMONA notification. Only companies with the *BEL* regulatory region are available for selection. If you leave this field blank, the process will select all companies which have a regulatory region of *BEL* (Belgium).

Preliminary Runs

Use this section to execute preliminary runs. The system selects and stores the data in the DIMONA result table and a test file. You can then review the data online before creating the official file or review and validate the xml file using xml schema validator software.

Field or Control	***Description***
Generate Data	Select this check box to have the process select data from Job and insert it into the DIMONA result table. Do not select this check box if you have performed changes since the last run, otherwise the changes will be overwritten by the process. **Note:** Any existing data that has not yet been reported will be overwritten. If you have performed manual changes, such as set an action to update or cancel, these changes will be overwritten as well.
Generate Preliminary File	Select this check box to have the system create a temporary file that you can review. The file name will have a *T* in position 31.

Official Run

Use this section after you have reviewed the data online or through the temporary file, performed any necessary manual changes, and consider the file ready to be sent to the social security office.

Field or Control	***Description***
Generate Final File	Select this check box to have the system create a final file to be sent to the social security office. The file name will have an *R* in position 31. This check box is available in production mode only. In test mode, the check box is unavailable. The mode is determined on the Online Processing Setup page for process name *DIMONA. - TESTENVIRONMENT* The system uses the following **Property Value** field values to determine the mode: • *Y* - test mode. • *N* - production mode. See Online Processing Setup BEL - Online Processing Setup Page.

Field or Control	***Description***
Version	Enter the DIMONA version (from the first page of the Glossarium) used when creating the DIMONA file. The system provides by default the last version number + 1 of the file sent by this sender. This value can be overwritten. The first time this DIMONA process is run, the user should set the version to *1*.

DIMONA Sender

Enter information about the person who is sending the notification.

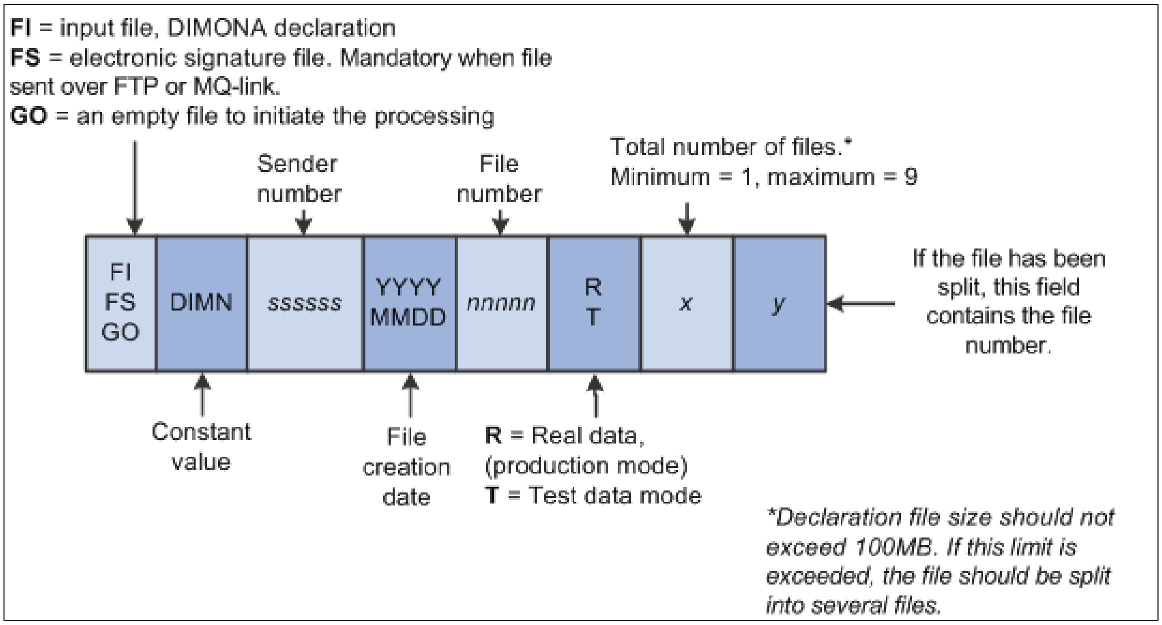
Field or Control	***Description***
Sender Nr (sender number), **Sender Name, Country,** and **Address**	Enter the number that the NOSS assigned to the person who is sending the notification. After you enter the sender number, the page displays the address information defined on the DIMONA Sender Setup page. See DIMONA Sender Setup Page.
Country Code	Enter the sender's country code.
Edit Address	Click this button to access the Edit Address page and update the address, if necessary.

Contact

Field or Control	***Description***
Name, Phone, and **Function**	Enter the name, telephone number, and function of the person whom the NOSS can contact in case a problem occurs with the file.

Understanding the XML DIMONA File Naming Convention

When running the DIMONA Declaration process (HR_DI_BEL) using the New DIMONA Notification page, the system will create an eight segment file name, 33 to 35 characters, using the following format:



An example of a DIMONA declaration input file created on July 16, 2011 in final mode might have the following file name:

```
FI.DIMN.998033.20110716.00044.R.2.1
```

The sender ID is 998033 and this would be the first of 2 files.

Note: The New DIMONA Notification process creates files starting with *FI* only

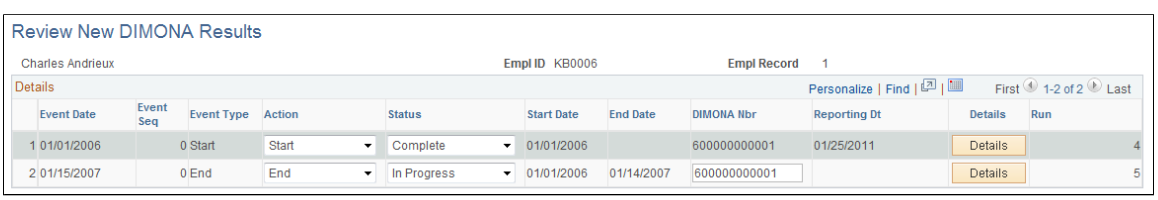
Review New DIMONA Results Page

Use the Review New DIMONA Results page (HR_DI_RVW1_BEL) to review new DIMONA results.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Review New DIMONA Results** > **Review New DIMONA Results**

This example illustrates the fields and controls on the Review New DIMONA Results page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Event Date	Displays the date of the DIMONA event from Job Data, such as a start or end of employment.
Event Sequence	Displays the effective sequence of the Job Data transaction associated with the DIMONA event. The sequence number tracks the order of multiple administrative actions that occur on the same day.
Event Type	Displays the type of DIMONA event *Start* or *End,* as determined by the process. See DIMONA Event Type Page.
Action	View or select the notification action. Valid values are: • *Start* - The process provides this value by default when associated with a starting job action, such as a hire or rehire. • *End* - The process provides this value by default when associated with an ending job action, such as a termination. • *Cancel* - The process provides this value by default to indicate that the event no longer exists in Job Data. • *Update* - Select this value to indicate that you have updated the event. • *None* - Select this value to indicate that there is no event to report.
Status	View or select the status of the notification. Valid values are: • *Cancel* - Select this value to indicate that you have canceled the event. • *Complete* - The process provides this value by default when the Generate Final File check box is selected on the New DIMONA Notification page. • *Error* - Select this value to indicate that this event was created in error. • *In Progress* - The process provides this value by default when the Generate Preliminary File check box is selected on the New DIMONA Notification page. • *Rejected* - Indicates that it was rejected by the social security. The load notification process selects this value if the notification was sent back by the social security due to error.
Start Date	Displays the event start date from Job Data.

Field or Control	***Description***
End Date	Displays the event end date from Job Data.
DIMONA Nbr (DIMONA number)	The DIMONA Nbr is provided by the social security and loaded in the system with the load notification process.
Reporting Dt (reporting date)	Displays the date the process was finalized.
Details	Click this button to open the DIMONA Result Details page to view additional information about the notification.
Run	Increments by one each time the process is run.

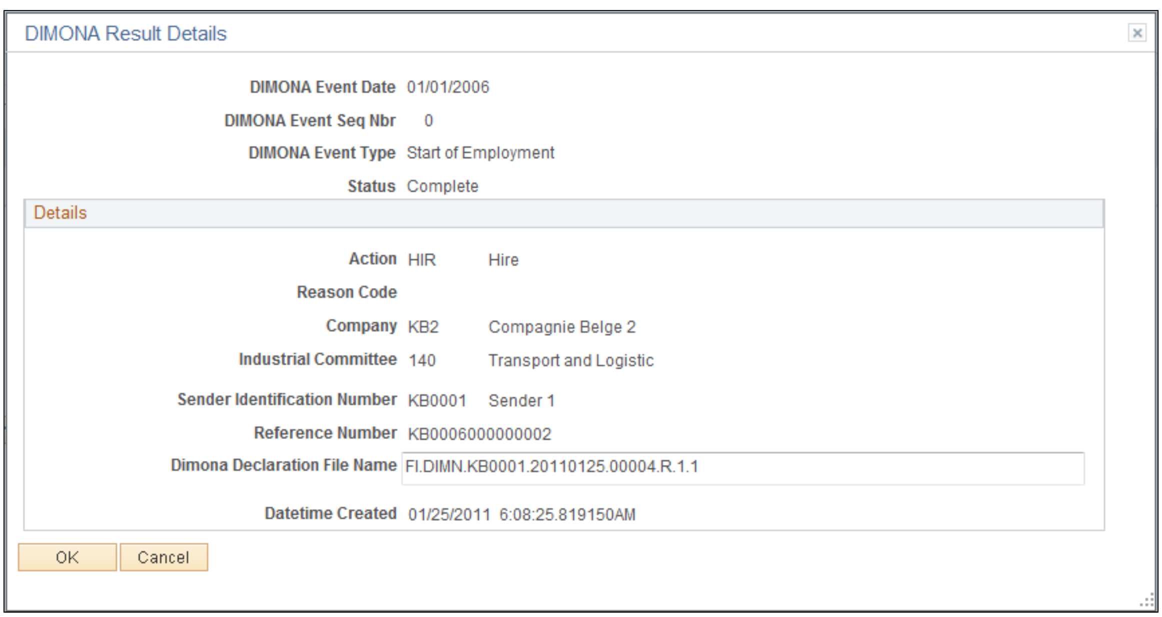
DIMONA Result Details Page

Use the DIMONA Result Details page (HR_DI_RSLT_SEC_BEL) to view additional data regarding the DIMONA process.

Navigation:

Click the Details button on the DIMONA Result page.

This example illustrates the fields and controls on the DIMONA Result Details page. You can find definitions for the fields and controls later on this page.



Displays additional information about the DIMONA notification.

Field or Control	*Description*
Reference Number	Displays the number that the social security will reference when sending back the notification. It is the link between the employee data (in the xml) and the handling result in the notification. **Note:** The reference number is generated by the process: EmplID followed by a sequence number
Dimona Declaration File Name	Displays the DIMONA file name the process created in final production mode.

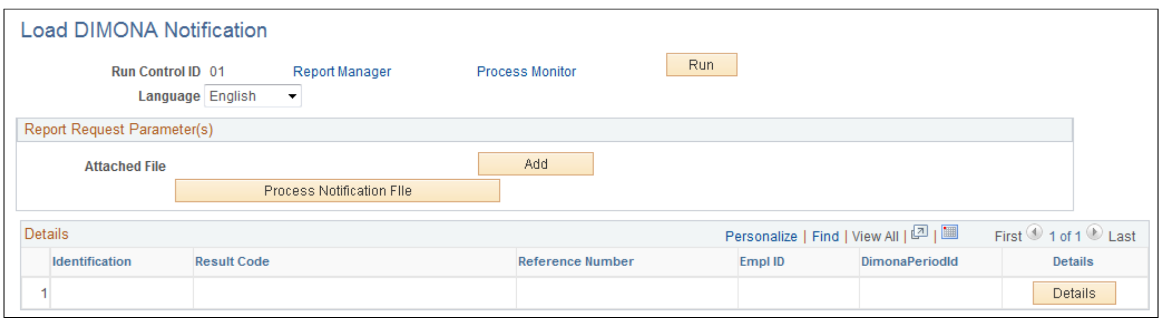
Load DIMONA Notification Page

Use the Load DIMONA Notification page (HR_DI_LOAD_BEL) to load DIMONA notification.

Navigation:

Workforce Administration > **Collective Processes** > **Administration BEL** > **Load DIMONA Notification** > **Load DIMONA Notification**

This example illustrates the fields and controls on the Load DIMONA Notification page. You can find definitions for the fields and controls later on this page.



In case of a successful submission of a new hire, or start of employment, a return file will be provided with the newly assigned DIMONA number, which will be stored in the tables for future reference. In cases of an unsuccessful submission, the error(s) will be uploaded and viewable in the next transaction.

Field or Control	*Description*
Details	Click this button to open the DIMONA Error Details page and view error details.

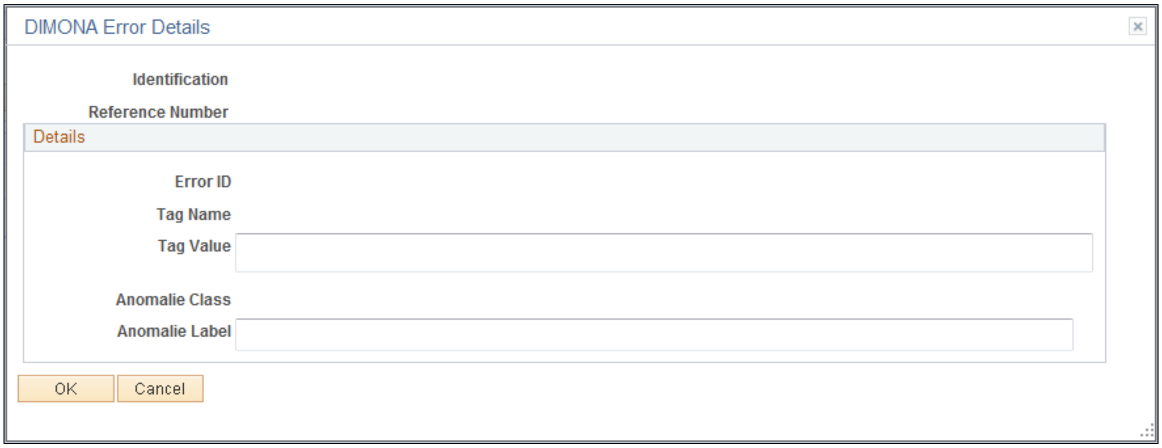
DIMONA Error Details Page

Use the DIMONA Error Details page (HR_DI_LOAD_SEC_BEL) to view error details from the DIMONA load process.

Navigation:

Click the **Details** link on the Load DIMONA Notification page.

This example illustrates the fields and controls on the DIMONA Error Details page. You can find definitions for the fields and controls later on this page.



Running the Social Report

This topic lists the page used to run the Belgian Social report.

Page Used to Run the Social Report

Page Name	***Definition Name***	***Usage***
Social Report BEL Page	RUNCTL_PER067_BEL	Run the Social Report (PER067BEL), which reports a variety of employer and employee information that is required by the government.

Chapter 19

(ESP) Managing Spanish Reporting

Managing Contrata Communications

These topics provide an overview of Contrata (Sistema Contrat@) communication management, list steps to manage Contrata XML file generation, list prerequisites, and discuss how to manage Contrata communications.

Pages Used to Manage Contrata XML File Generation

Page Name	***Definition Name***	***Usage***
Print Contrata XML File ESP Page	XML_RC_ESP	Specify the template type and XML file ID, and run the process to generate the XML file to send to SEPE.
Read External XML File ESP Page	XML_RC_READING	View and manage SEPE. responses to the Contrata XML files that you submit.
Review External XML File ESP Page	XML_RC_REVIEW	To review the content of the SEPE responses to the XML files that you submit.

Understanding Contrata Communication Management

Contrata is a web service of the Public Service of Employment (SEPE) that enables companies to file new employees' employment contracts, change an employee's situation from temporary to permanent, notify SEPE of extensions to contracts, and carry out other legally required processes. When companies submit the communication online to SEPE they receive an immediate response notifying them of errors. Companies can then correct the errors before confirming the communication. It is mandatory that companies communicate contract data to SEPE.

Human Resources for Spain provides Contrata communication functionality that enables you to track multiple persons' labor contract data and to generate an XML flat file to send to SEPE. This feature combined with the Contrata web service eliminates the paper communication between companies and SEPE and enables companies to communicate data for multiple persons at once, thus reducing time and costs.

Contrata XML files contain all of the data related to the hiring of employees between two dates for a specific type of contract communication. Human Resources for Spain delivers the templates to create XML files to use for Contrata communications of labor contracts, basic copy, and extensions. The XML file generation process obtains data from the HCM database and from data that you enter when generating the XML file. Once you generate the XML file you can then upload the file through the Contrata web service.

To use the Contrata communication management functionality you must first review the delivered XML file setup data during implementation to ensure that it complies with your company's requirements. This setup includes defining the XML sets, code tables, nodes, and templates necessary for the XML generation process to gather data and generate the XML file. Human Resources for Spain delivers a large percentage of this setup data to facilitate implementation.

Delivered XML Codes for Contrata Reporting

The Spanish social security administration (SEPE) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Contrata reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Contrata communication functionality:

XML Code Table	***Description***	***Used By***
TELCOLBO	Bonification Groups	Contrata
TEKLEYBO	Bonification Law	Contrata
TDPMUNIC	City Codes	Contrata
TERFIRCB	Clause Signature	Contrata
TEHTPCTO	Contract Codes	Contrata
TERRORES	Contrata Errors	Contrata
TEVACTCL	Council Activity	Contrata
TEUECCLL	Council Codes	Contrata
SPAISXTC	Country	Contrata
STIACATC	Degree	Contrata
THITIACA	Degree (SISPE)	Contrata

XML Code Table	***Description***	***Used By***
TEJINDIS	Disability Types	Contrata
TESCETCO	ET / CO / TE Contracts	Contrata
TBONVFOR	Education Level	Contrata
TETPGMEM	Employment Program	Contrata
SSEXOXTC	Gender	Contrata
SACECOTC	Industrial Activity	Contrata
TEIINTER	Interim Reasons	Contrata
STDIDETC	NID Type	Contrata
TAICLAOC	Official Occupation Codes CNO-4	Contrata
SOCUPATC	Official Occupation Codes CNO-8	Contrata
TEQPTIEM	Period	Contrata
TAUCOMAU	Region	Contrata
THYDISLE	Regulations	Contrata
TEYTRELE	Relieve Employee	Contrata
TEXTINVE	Research Employee	Contrata
TEWEINVE	Research Employer	Contrata
TFGGRCOT	SS Work Groups	Contrata
SREGCOTC	Scheme	Contrata
SPROVITC	States	Contrata

XML Code Table	Description	Used By
THPCOLFO	Training Contract Groups	Contrata
TENLEYDE	Unlimited Contract Regulation	Contrata
TEOCOLDE	Unlimited Contract Regulation Groups	Contrata
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Contrata Reporting

Human Resources for Spain delivers XML file structures for Contrata communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Contrata Reporting

Human Resources for Spain delivers six different types of communications for Contrata reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

XML Template	Description
Contrat@ - Contracts	Used to communicate new contracts.
Contrat@ - Extensions	Used to communicate extension of a contract.
Contrat@ - Basic Copy	Used to communicate the clauses of a contract.
Contrat@ - Callings	Used to communicate to the employment agency.
Contrat@ - Transformations	Used to communicate the transformation of a contract.
Remote Work Agreement	Used to communicate agreements for Remote Work.

Steps to Manage Contrata XML File Generation

Once you have entered all of the data necessary for Contrata reporting, you can use the Print Contrata XML File ESP component to create the Contrata report in XML file format for reporting to SEPE.

To complete the Contrata XML file generation process:

1. Select the template (type of communication) to use for the XML file on the Print Contrata XML File ESP page.
2. Specify report parameter and search for persons to include in the report using the Print Contrata XML File ESP page.
3. Select from the search results, the persons to include in the report.
4. Run the load process.
5. Send the XML file to SEPE through the Contrata web service.

Prerequisites

Before you can use the Contrata communications functionality you must first define Spanish workforce data related to Contrata XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

Related Links

“Setting Up XML Reporting Framework” (Application Fundamentals)

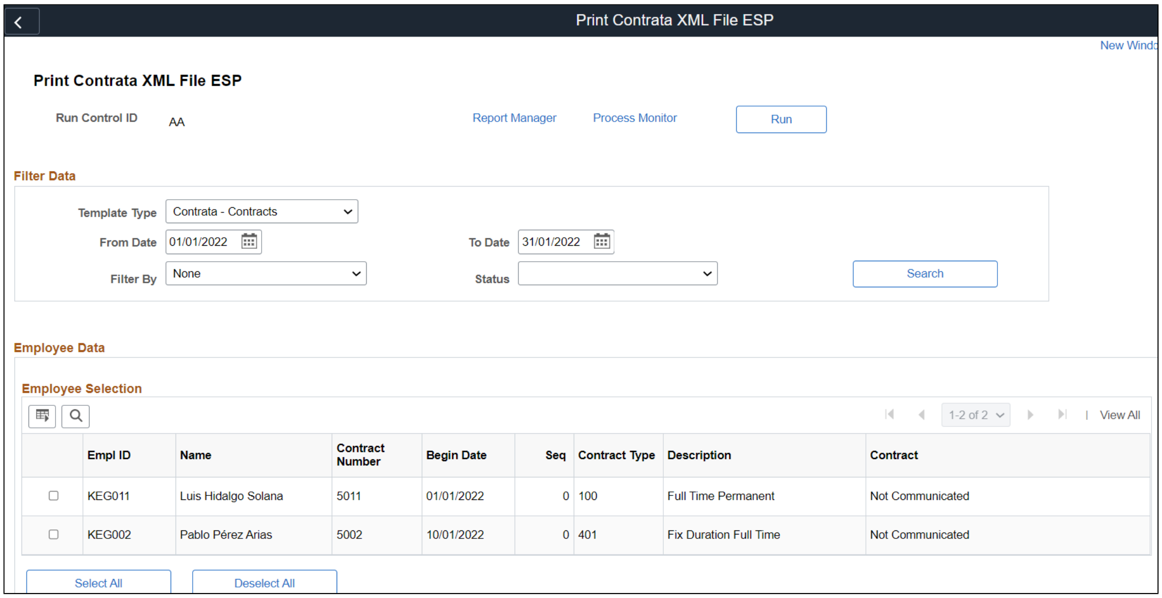
Print Contrata XML File ESP Page

Use the Print Contrata XML File ESP page (XML_RC_ESP) to run the process to generate the XML file to send to SEPE.

Navigation:

Workforce Administration > **Workforce Reports** > **Print Contrata XML File ESP** > **Print Contrata XML File ESP**

This example illustrates the fields and controls on the Print Contrata XML File ESP page.



Field or Control	***Description***
Template Type	Select the XML template that you want to use for Contrata communication. The values available are: *Contrat@ - Contracts*, *Contrat@ - Extensions*, *Contrat@ - Basic Copy*, *Contrat@ - Callings*, *Remote Worker Agreement* and *Contrat@ - Transformations*
From Date and **To Date**	Select the date range for which you want to generate the XML file.
Filter By	Select a filter condition to narrow down your search results. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are: • *Company* • *Employee* • *None* • *SS Contribution Center*

Field or Control	*Description*
Status	Select the status of the Contrata communication in this field. The values available are: • *Not Communicated*: The Contrata communication has not been sent yet. • *XML Generated*: The XML file has been generated, but not communicated yet. • *XML Sent/Confirmated*: The XML file has been generated, and communicated to SEPE.
Search	Click the button to search for records that match the filter conditions.

Based on the filter options you select in the **Filter By** field, a Filter List grid appears on the page. The fields on the Filter List grid are listed below:

Field or Control	*Description*
Company and **Description**	If you select *Company* in the **Filter By** field, then select the company for which you want to generate the Contrata communication. The **Description** field automatically displays the company name.
Empl ID and **Name**	If you select *Employee* in the **Filter By** field, then select the employee for whom you want to generate the Contrata communication. The **Name** field automatically displays the employee name.
Company, **Description** and **Social Security Number**	If you select *SS Contribution Center* in the **Filter By** field, then select the company and the social security number for which you want to generate the Contrata communication. The **Description**field automatically displays the company name.

Previewing Generated XML

After you run the process from the Print Contrata XML File ESP page to create the Contrata.xml file, you can go to Process Scheduler and click Details, View Log/Trace to view the XML that was generated for the selected person. Use the template ID that you selected on the page.

Note that to generate the XML file with the correct template, you must select the correct template type and use the appropriate XML file ID.

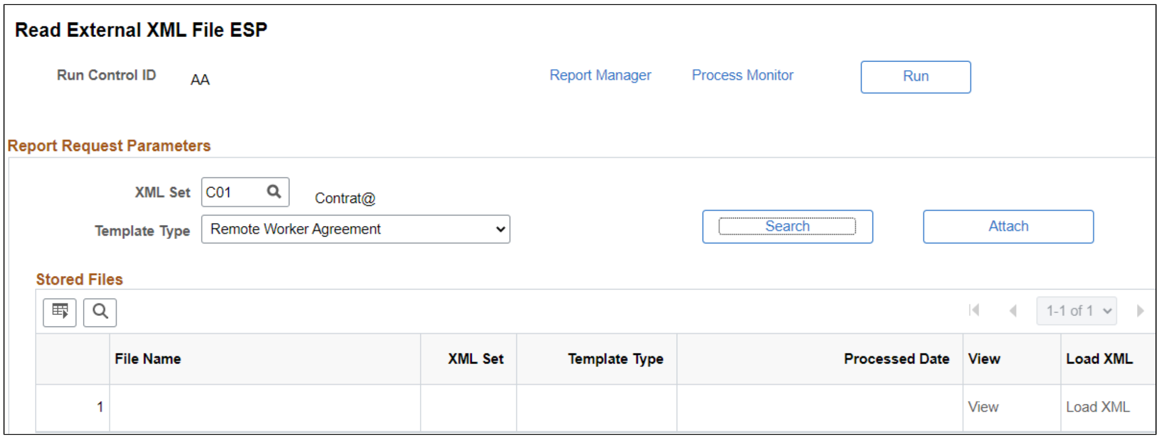
Read External XML File ESP Page

Use the Read External XML File ESP page (XML_RC_READING) to view and manage the SEPE responses to the XML files that you submit.

Navigation:

Workforce Administration > **Workforce Reports** > **Read External XML File ESP**

This example illustrates the fields and controls on the Read External XML File ESP page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
XML Set	Select the XML set that you want to run. In case of Contrat@ you would need to select XML Set: C01.
Template Type	Select the type of template of the communication for which you want to manage the response. The values available vary based on the type of communication you selected in the XML Set field. For example, if you select C01 - Contrat@ in the XML Set field, the following contrata templates are available: • *Contrata - Basic Copy* • *Contrata - Callings* • *Contrata - Contracts,* • *Contrata - Extensions* • *Contrata - Transformations* • *Remote Work Agreement*
File Name	Displays the name of the file that has been attached to the system.
XML Set	The XML Set that corresponds to the file being loaded.
Template Type	Displays the Template Type that corresponds to the file being loaded
Processed Date	Displays the date in which the file was processed.

Field or Control	*Description*
View	Click this link to view the attached file.
Load XML	Click this link to load the content of the response file into application records.

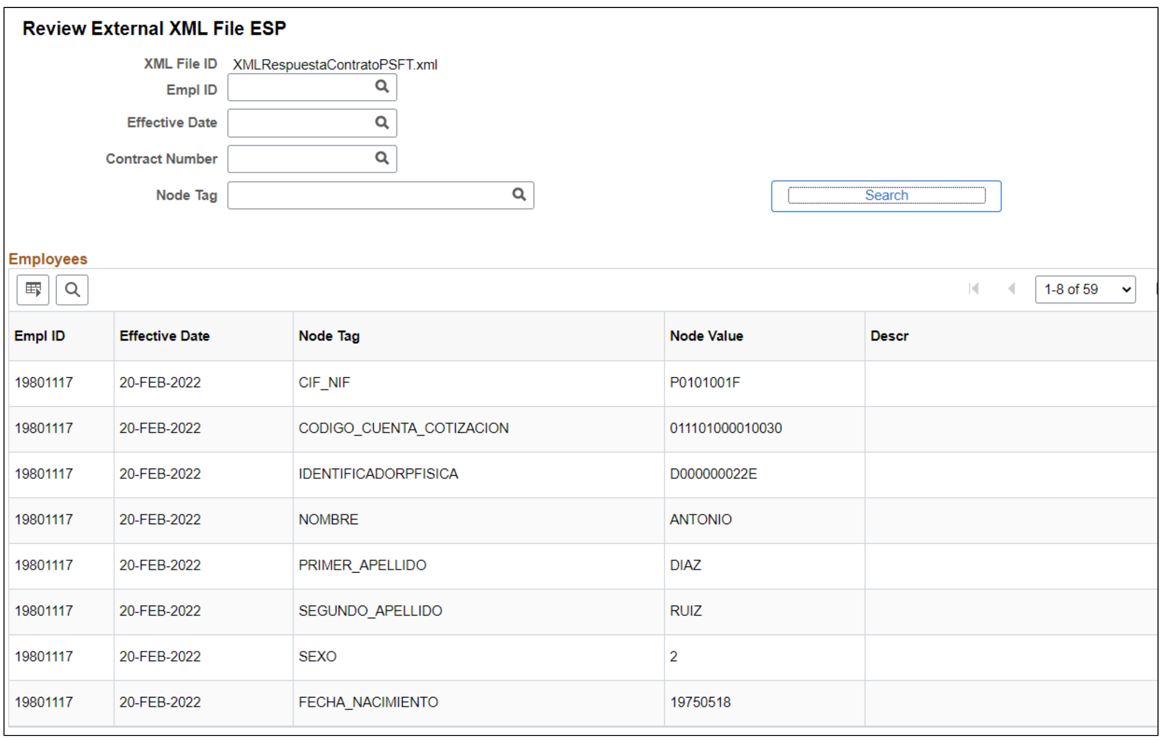
Review External XML File ESP Page

Use the Review External XML File ESP page (XML_RC_REVIEW) to review the content of the SEPE responses to the XML files that you submit.

Navigation:

Workforce Administration > **Workforce Reports** > **Review External XML File ESP**

This example illustrates the fields and controls on the Review External XML File ESP page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
XML File ID	The system displays the name of the response file that has been selected
Empl ID	User can filter by Empl ID.

Field or Control	***Description***
Effective Date	User can filter by Effective date.
Contract Number	User can filter by Contract number.
Node Tag	User can filter by any Node Tag on the file.

Managing Delta Communications

These topics provide an overview Delta (Sistema Delt@) communication management, list the steps to manage industrial accident information, list prerequisites, and discuss how to generate the Delta XML file.

Pages Used to Manage Delta Communications

Page Name	***Definition Name***	***Usage***
Social Security Company Setup - Company Setup Page	SOCS_SETUP_ESP	Enter specific company information, including data needed for social security purposes.
“Establishment Address Page” (Application Fundamentals)	ESTAB_TBL1_GBL	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
“Incident Details - Incident Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INCIDENT	Add a new incident or update an existing incident. Be sure to enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence.
“Incident Details - Description Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INC_DESCRIPTION	Describe the health and safety incident and record related data. Be sure to enter a long description of the incident.
“Incident Details - Location Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INC_LOCATION	Identify the location where the incident occurred and specify whether the incident was a car accident.
“Injury Details - Injury Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INJ_NOTIFY	Enter information about employees and non-employees who have work-related injuries or illnesses.

Page Name	***Definition Name***	***Usage***
“(ESP) Detailed PAT Data Page (Injury Details - Injury)” (PeopleSoft Human Resources Monitor Health and Safety)	HS_PAT1_ESP_SEC	Enter details about the employee, employer, and place of accident for the PAT incident.
“(ESP) Detailed RAF Data Page (Injury Details - Injury)” (PeopleSoft Human Resources Monitor Health and Safety)	HS_RAF1_ESP_SEC	Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.
“Injury Details - Details Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INJ_DETAIL	Provide details of the injury or illness that is suffered by each person who is involved in the incident.
“(ESP) Detailed PAT Data Page (Injury Details - Details)” (PeopleSoft Human Resources Monitor Health and Safety)	HS_PAT2_ESP_SEC	Enter detailed information about the accident that caused the injury for PAT reporting.
“(ESP) Detailed RATSB Data Page (Injury Details - Details)” (PeopleSoft Human Resources Monitor Health and Safety)	HS_RATSB_ESP_SEC	Enter detailed data for RATSB reporting.
“Injury Details - Diagnoses Page” (PeopleSoft Human Resources Monitor Health and Safety)	HS_INJ_DIAGNOSIS	Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.
“(ESP) Detailed PAT Data Page (Injury Details - Diagnoses)” (PeopleSoft Human Resources Monitor Health and Safety)	HS_PAT3_ESP_SEC	Specify medical assistance and economic data for PAT incidents.
Print Delta XML File ESP Page	XML_RC_ESP	Specify the template type and XML file ID, and run the process to generate the XML file to send to the insurance companies.

Understanding Delta Communication Management

Every company must report to the Work Minister, external insurance companies, and other management entities the details of industrial accidents that occur to employees. Regulations require that companies report these industrial accidents through Delta reports within a given timeframe.

There are three types of Delta accident reports:

- Industrial accident report where the company must send a report that lists all employees with absences due to an industrial accident (PAT).
- Industrial accident report where the company must send a report that lists employees involved in an industrial accident resulting in no absence (RATSB).

- Report that lists employees who have finished the industrial accident absence because of medical discharge or death (RAF).

Human Resources for Spain provides Delta communication functionality that enables you to efficiently communicate to management entities the information about industrial accidents. This functionality helps speed the distribution of information, reduce costs, and simplify communications while guaranteeing the confidentiality of the content of documents.

The basic flow of industrial accident data is as follows:

1. The accident takes place and the person informs the company with or without a sick note.

2. The company records all incident and injury details about the industrial accident in the system.

3. The company generates the appropriate XML file and sends it to the management entities.

4. If errors exist the management entities return their copies to the company.

5. The company corrects the errors and resends copies to the management entities.

Using Human Resources for Spain, you record all data necessary for the Delta accident reports through components in the Human Resources Health and Safety business process. The Health and Safety business process enables you to create and track incidents related to health and safety for employees and non-employees. It also enables you to associate multiple individuals with a single incident. Specifically, use the Incident Details component and the Injury Details component to enter the necessary data for XML file generation. Through the Incident Details component you can enter or update industrial accident data. Through the Injury Details component you can enter the necessary data about people involved in an industrial accident.

Once you have entered all of the data necessary for Delta reporting, you can use the Print Delta XML File Id ESP component for Delta reporting. Within this component, you can search for employees and incident types matching your filter criteria, select the employees for whom you want to send data to the insurance company, and generate the XML files. Human Resources for Spain provides a unique XML file template for each of the Delta accident reports. The template provides the file structure in XML format.

If you make changes to the report data or the management entities find errors in the report and return the XML file, you can use these same components to correct the errors and resend the XML file.

The Delta communication functionality is integrated with other PeopleSoft applications for integral management of data. In addition, both the Delta communication functionality and the Contrata functionality share components related to data setup, XML file setup, and XML file generation. The Contrata documentation provides further details about these topics.

Delivered XML Codes for Delta Reporting

The Spanish social security administration delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Delta reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Delta communication functionality:

XML Code Table	Description	Used By
DIG	Body Part	Delta
CNT	Contact Types	Delta
INJ	Injury Description	Delta
DEV	Irregular Activity	Delta
TOL	Material Agent	Delta
CNO	Official Occupation Codes CNO-2	Delta
TSK	Physical Activity	Delta
PLC	Place Type	Delta
WRK	Work Type	Delta
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Delta Reporting

Human Resources for Spain delivers XML file structures for Delta communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Delta Reporting

Human Resources for Spain delivers three different types of communications for Delta reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

XML Template	Description
DELT@ PAT	Used for communication of industrial accident with sick note.

XML Template	*Description*
DELT@ RATSB	Used for communication of industrial accident without sick note.
DELT@ RAF	Used for communication of discharge or death.

Related Links

Managing Contrata Communications

Steps to Manage Industrial Accident Information

This topic describes the steps necessary to enter industrial accident data and generate the related XML files for reporting.

To manage industrial accident information:

1. Complete the prerequisite setup for the Delta communication functionality.
2. Set the Delta data Preventive option for a company on the Company Setup page.
3. Enter the insurance company code on the Establishment Address page.
4. Use the Incident Details component to complete these steps:
    a. Enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence on the Incident Details - Incident page.
    b. Enter a long description of the incident in the Description text box on the Incident Details - Description page.
    c. On the Incident Details - Location page enter the location, address, and establishment information where the accident occurred, and, if applicable, select the Car Incident check box to indicate that the incident is a car accident.
    d. Enter any other data related to the incident on the remaining pages of the component.
5. For an PAT incident, use the Injury Details - Injury component to:
    a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
    b. Select the PAT value in the **Incident Type Esp** field.
    c. Specify the absence begin date, working hours, and whether the incident is a relapse occurrence.
    d. Click the Accident with sick note link to access the Detailed PAT Data page, where you must specify PAT data details about the employee, employer, and place of incident.
    e. Enter an end date on the Injury Details - Injury page so that the PAT becomes a RAF only if the PAT results in a medical discharge or death.

f. Click the Medical Discharge or Death link to access the Detailed RAF Data page, where you must define the reason for discharge, the injury grade, and the diagnosis code.

g. Move to the Injury Details - Details page and click the Accident with sick note link to access the Detailed Pat Data page, where you can specify further details of the PAT incident.

h. Move to the Injury Details - Diagnosis page and click the Accident with sick note link to access the Detailed PAT Data page, where you can specify medical assistance and economic data for the PAT incident.

i. Enter any other data related to the injury in the remaining pages of the component.

6. For an RATSB incident, use the Injury Details - Injury component to:

   a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.

   b. Select the RATSB value in the **Incident Type Esp** field.

   c. Move to the Injury Details - Details page and click the Accident without sick note link to access the Detailed RATSB Data page, where you can specify further details of the RATSB incident.

   d. Enter any other data related to the injury in the remaining pages of the component.

7. If you make changes or corrections to an XML file that requires you to resend the Delta communication report, use the Print Delta XML File Id ESP component to regenerate the modified XML file.

Note: For the system to include a person in XML file reports that the Delta service generates, the person must work for a company where you have specified the Delta data option on the Company Setup page.

Related Links

(ESP) Setting Up Spanish Workforce Tables
"Defining Establishments" (Application Fundamentals)
"Entering Health and Safety Incident Details" (PeopleSoft Human Resources Monitor Health and Safety)
"Entering Injury Details" (PeopleSoft Human Resources Monitor Health and Safety)

Prerequisites

Before you can use the Delta communications functionality first you must define Spanish workforce data related to Delta accident report XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

Related Links

"Setting Up XML Reporting Framework" (Application Fundamentals)

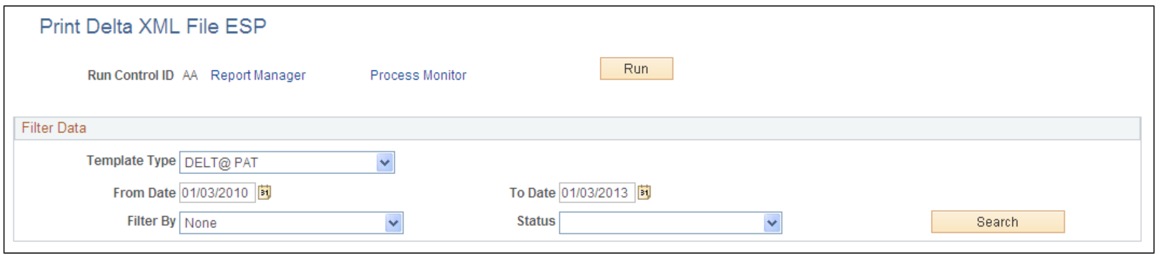
Print Delta XML File ESP Page

Use the Print Delta XML File ESP page (XML_RC_ESP) to specify the template type and XML file ID, and run the process to generate the XML file to send to the insurance companies.

Navigation:

Workforce Monitoring > **Health and Safety** > **Reports** > **Print Delta XML File ESP** > **Print Delta XML File ESP**

This example illustrates the fields and controls on the Print Delta XML File ESP page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Template Type	Select the type of template you want to use for Delta communication. The values available are: *DELT@ PAT*, *DELT@ RATSB* and *DELT@ RAF*
From Date and **To Date**	Select the date range for which you want to generate the Delta communication.
Filter By	Select a filter condition to narrow down your search results. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are: • *Company* • *Employee* • *None* • *SS Contribution Center*
Status	Select the status of Delta communication in this field. The values available are: • *Not Communicated*: The Delta communication has not been sent yet. • *XML Generated*: The XML file has been generated, but not communicated yet. • *XML Sent/Confirmated*: The XML file has been generated, and communicated to the agencies.

Field or Control	***Description***
Search	Click the button to search for records that match the filter conditions.

Based on the filter options you selected in the **Filter By** field, a Filter List grid is visible on the page. The fields on the Filter List grid are listed below:

Field or Control	***Description***
Company and **Description**	If you select *Company* as the filter option, then select the company for which you want to generate the Delta communication. The **Description** field automatically displays the company name.
Empl Id and **Name**	If you select *Employee* as the filter option, then select the employee for whom you want to generate the Delta communication. The **Name** field automatically displays the employee name.
Company, **Description** and **Social Security Number**	If you select *SS Contribution Center* as the filter option, then select the company and the social security number for which you want to generate the Delta communication. The **Description** field automatically displays the company name.

Previewing Generated XML

After you run the process from the Print Delta XML File ESP page to create the Delta.xml file, you can go to Process Scheduler and click Details, View Log/Trace to find the file and preview the XML that was generated for the selected person. Use the template ID that you selected on the Definition page of this component.

Printing Contracts

Printing contract functionality enables generating PDF reports corresponding to the contracts between the company and the employee.

Utilizing the flexible setup delivered to generate XML files to define the data structure of the PDF reports, the system uses the same pages to define the data of these reports by defining specific nodes.

Pages Used To Print Contracts

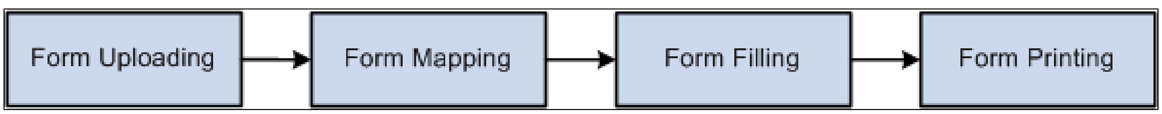
Page Name	*Definition Name*	*Usage*
Print Contracts ESP Page	CTPR_RC_ESP	Print contracts in batch for employees that are grouped within a specified Contract Printing Run ID.

Understanding Contract Printing

The Spanish government delivers a complete set of contract forms in PDF format that employers can download from the government website. The employer must complete the appropriate forms for new hires and submit them to the government after the newly hired employees sign the forms. To assist employers in the completion of these contract forms, Human Resources for Spain provides Contract Printing functionality to print the contracts.

Employers can then have employees sign the printed forms and return them to the human resources administrator, who can then submit the completed forms to the government.

The following diagram shows the four basic tasks involved in Contract Printing functionality:



System administrators must perform form uploading and form mapping tasks whenever there are new contract types that require contract-printing capability. Human Resources administrators perform the form filling and form printing tasks as necessary.

To set up the system for the printing of new contracts, system administrators can define the XML nodes that relate to the contract form, including the node values and whether the nodes are mandatory, through the XML Node Table component. They can also create empty nodes to enable Human Resources administrators to edit the node data online before printing.

To generate and print contracts, Human Resources administrators can print a batch of forms for a selected group of employees through the Print Contracts ESP component. They can then give the printed form to the employee for signature.

Understanding Contract Printing XML Setup

Human Resources for Spain uses the XML generation process to retrieve the Human Resources data needed for completing the forms to print contracts, delivering all of the setup necessary to print contracts for unlimited contract types. System administrators can define additional data for the perform contract printing for other contract types.

Contract Printing XML Setup Structure

The setup for contract printing is based on:

- An XML set.

Human Resources for Spain delivers the XML set *P01* for use with all contract printing.

To maintain XML set definitions, use the XML Set Table component.

- XML nodes.

  XML nodes for contract printing are always keyed by the XML set for contract printing. Human Resources for Spain delivers the XML nodes for printing unlimited contracts.

  Specifically, Human Resources for Spain delivers the *PE-170* XML node for printing unlimited contracts and unlimited full-time contracts and the *PE-172* XML node for printing transformation to unlimited contracts. These nodes contain children nodes that correspond to each of the fields on the contract, and themselves are children nodes to the *P0 01* contract-printing root node.

  Human Resources for Spain also delivers the children nodes for PE-170 and PE-172 contracts.

  System administrators can maintain the delivered nodes and also define additional nodes for other contract types. To define nodes that comprise the XML file structure for contract printing of specific contract types, use the XML Node Table component.

- An XML template.

  The XML template for contract printing is keyed by the XML set for contract printing. Human Resources for Spain delivers the XML template for use with all contract printing. Human Resources for Spain delivers the XML template *P01* for use with all contract printing.

  To define templates for use during XML file generation, use the XML Template Table component.

Related Links

“Setting Up XML Reporting Framework” (Application Fundamentals)

Understanding Contract Generation

Human Resources administrators can use the Contract Printing ESP component to generate, review, edit, and validate contract data.

To create contracts:

Note: To print contracts in groups, use the Print Contracts ESP component.

Related Links

Print Contracts ESP Page

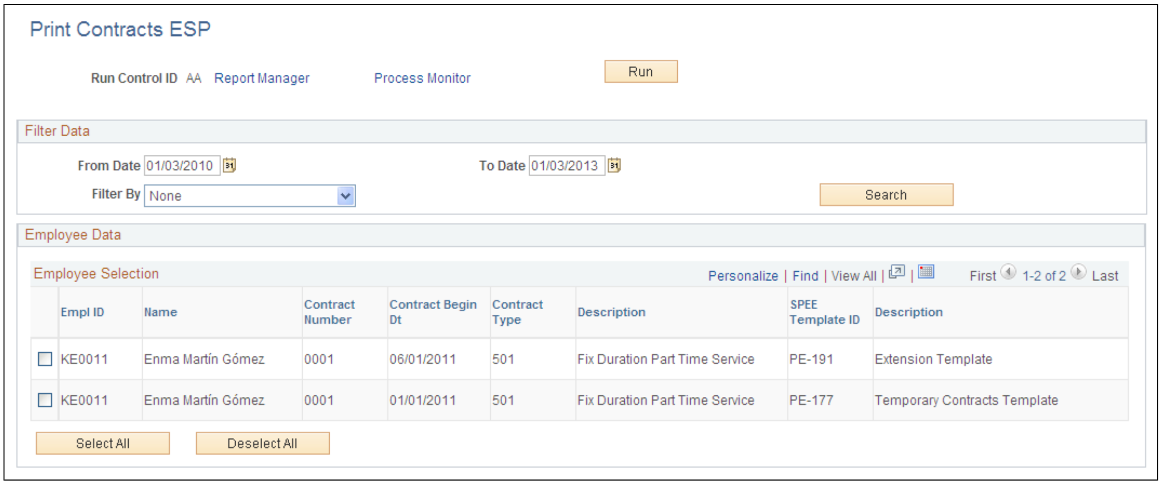
Print Contracts ESP Page

Use the Print Contracts ESP page (CTPR_RC_ESP) to print contracts based on some filter conditions.

Navigation:

Workforce Administration > **Workforce Reports** > **Print Contracts ESP** > **Print Contracts ESP**

This example illustrates the fields and controls on the Print Contracts ESP page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
From Date and **To Date**	Select the date range for which you want to print the contracts.
Filter By	Select a filter condition to narrow down your search results. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are: • *Company* • *Employee* • *None* • *SS Contribution Center*
Search	Click this button to search for records that match the selected filter conditions.

Based on the filter options you selected in the **Filter By** field, a Filter List grid is visible on the page. The fields on the Filter List grid are listed below:

Filter Grid

Field or Control	***Description***
Company and **Description**	If you select *Company* in the **Filter By** field, then select the company for which you want to print the contracts. The **Description** field automatically displays the company name.

Field or Control	Description
Empl ID and **Name**	If you select *Employee* in the **Filter By** field, then select the employee for whom you want to print the contracts. The **Name**field automatically displays the employee name
Company, **Description,** and **Social Security Number**	If you select *SS Contribution Center* in the **Filter By** field, then select the company and the social security number for which you want to print the contracts. The **Description** field automatically displays the company name.

Generating AFI Flat Files

Pages Used to Generate AFI Flat Files

Page Name	Definition Name	Usage
Create AFI File ESP - Employees Page	AFI_RC_1_ESP	Search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees.
Create AFI File ESP - Employee Inquiries Page	AFI_RC_2_ESP	Create inquiries to submit to the Social Security General Treasury about selected employees. The AFI report process includes these inquiries in the AFI flat file that it generates.
Create AFI File ESP - Company Inquiries Page	AFI_RC_3_ESP	Create inquiries to submit to the Social Security General Treasury about selected companies. The AFI report process includes these inquiries in the AFI flat file that it generates.
Create AFI File ESP - Non Employee Inquiries Page	AFI_RC_4_ESP	Create inquiries to submit to the Social Security General Treasury about selected non-employees. The AFI report process includes these inquiries in the AFI flat file that it generates.

Understanding the AFI Process

For Spanish employers, PeopleSoft Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format that is required by the Spanish authorities.

Every time you add, delete, or update an effective-dated row to the JOB_DATA record, the system verifies whether the action is a termination. If so, the system adds, deletes, or updates the corresponding effective-dated row in the WKF_CNT_TYP record via PeopleTools Integration Broker. The system uses the ESPAFIData_Sync message subscription within the WORKFORCE_SYNC message to perform the synchronization.

When ready you can run the AFI process through the Create AFI Report ESP component. The AFI process generates a flat file that lists changes in workforce such as hiring, terminations, personal changes, or job data changes for a particular period. The system ensures that employees for whom you have already generated the report are not included in subsequent file generations.

In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' or companies' social security contributions.

When you generate an AFI report through the AFI file generation process, the system assigns an AFI file name to each row of employee AFI data that it includes in the file. The assignment of this value prevents repeat communication of the data in subsequent AFI files. The system also assigns to the communicated row of data a node status value of *Included in AFI* and a time stamp value that specifies the date and time of the processing.

Note: To use AFI reporting functionality you must configure PeopleTools Integration Broker to support Integration Broker.

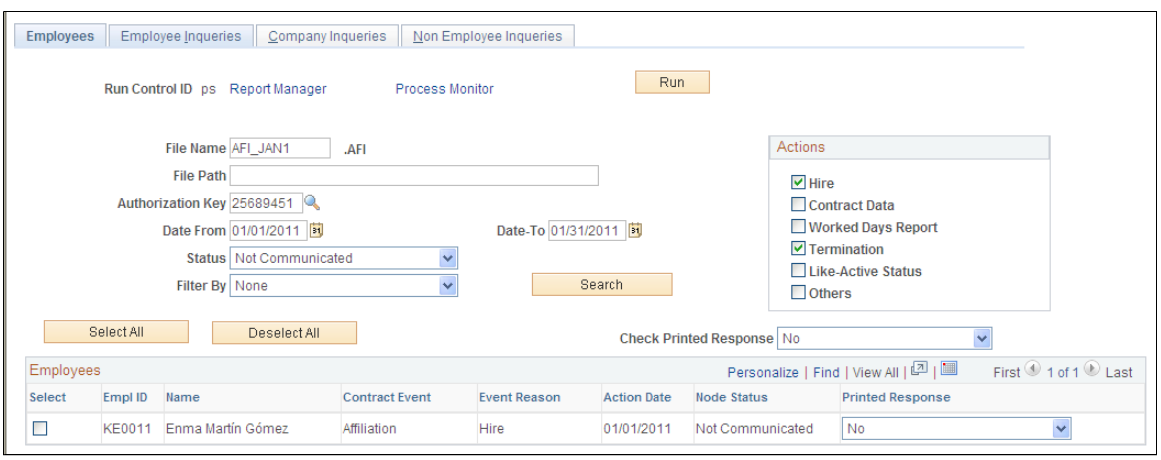
Create AFI File ESP - Employees Page

Use the Create AFI File ESP - Employees page (AFI_RC_1_ESP) to search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees.

Navigation:

Workforce Administration > **Workforce Reports** > **Create AFI File ESP** > **Employees**

This example illustrates the fields and controls on the Create AFI File ESP - Employees page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
File Name	Enter the name of the file that you want the process to use for the report. The system stores the data in an AFI file.
File Path	Enter the path where you want the process to store the report file.
Authorization Key	Select to narrow search results to employees working for companies with this authorization key. Social Security General Treasury provides companies with authorization codes to access Winsuite.
Date From and **Date-To**	Enter a date range to find all employees with a change in social security status between these dates.
Filter By	Select a filter to narrow search results further. When you select a filter, the Filter Data Grid becomes available to specify filter details. Available filters are: • *SS Contribution Center:* Select to run the process for a selected company and a social security number. The system displays the **Filter Data Grid** for you to select the company and social security number. • *Company:* Select to run the process for selected companies. The system displays the **Filter Data Grid** for you to select the companies. • *Department:* Select to run the process for selected departments. The system displays the **Filter Data Grid** for you to select the setID and departments. • *Employee:* Select to run the process for selected employees. The system displays the **Filter Data Grid** for you to select the employee IDs. • *None:* Select to search without a filter.
Search	Click to retrieve results based on your search criteria.

Filter Data Grid

Field or Control	***Description***
Company	Select the company for which to report data.
Social Security Number	Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

Field or Control	*Description*
SetID	Select the department setID for which to report data.
Department	Select the department for which to report data.
EmplID (employee ID)	Select the specific employee ID for which to report data.

Actions

Field or Control	*Description*
Hire	Select to include employees who were hired.
Termination	Select to include employees who were terminated.
Contract Data	Select to include employees whose contracts changed.
Like-Active Status	Select to include employees with like-active situations.
Worked Days Report	Select to include part-time employees whose worked days need to be reported.
Others	Select to include employees with other type of actions.

Employees

The system displays employees that meet your search criteria and have AFI data that you still need to report to social security. The system displays only employees with social security actions that you have not yet communicated to social security in an AFI report. Select the check box next to the employee AFI data row to include the information in the AFI flat file.

Field or Control	*Description*
Select All	Click this button to select all employees in the search results grid.
Deselect All	Click this button to deselect the check box for all employees in the search results grid.

Field or Control	***Description***
Printed Response	Select whether you want a printed response from the Social Security General Treasury for the employee's AFI information. Values are: • *No:* Indicates that you do not want a printed response to the communication that you are sending. • *Print Resolution:* Indicates that you do want a printed response to the communication that you are sending. • *Contribution Data Report (IDC):* Indicates that you do not want a printed response to the communication that you are sending, but would like to receive information on the contribution data for the employee. • *Print Resolution + IDC:* Indicates that you want both a printed response to the communication that you are sending and information on the contribution data for the employee.

Create AFI File ESP - Employee Inquiries Page

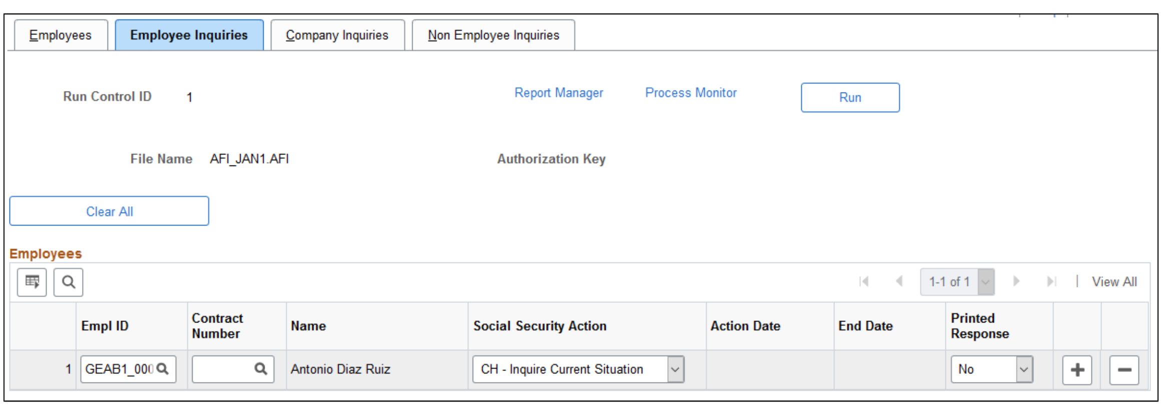
Use the Create AFI File ESP - Employee Inquiries page (AFI_RC_2_ESP) to create inquiries to submit to the Social Security General Treasury about selected employees.

The AFI report process includes these inquiries in the AFI flat file that it generates.

Navigation:

Workforce Administration > **Workforce Reports** > **Create AFI File ESP** > **Employee Inquiries**

This example illustrates the fields and controls on the Create AFI File ESP - Employee Inquiries page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Clear All	Click this button to deselect all rows in the Employees grid on this page.
Empl ID and**Contract Number**	Select the employee and the specific contract for which you want to submit an inquiry to social security.
Social Security Action	Select the inquiry that you want to submit to the Social Security General Treasury regarding the selected employee. Possible inquires are: • *CH - Inquire Current Situation:* Select to request the information that the Social Security General Treasury has about the employee. • *CE - Inquire IT Per Ill:* Select to request information about a temporary disability situation. • *CP - Inquire Previous Movements:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC. • *CD - Inquire TA2 Copy:* Select to request a copy of a specific TA2 report. The system displays the Action Date field. • *IDC - Inquire Contribution Data:* Select to request information on the contribution data for the employee in the period selected by the user. • *PLT - Contribution/Period. Employee:* Select to request information on the contribution data for the employee for Settlement Period.
Action Date	If you select to inquire about a duplicate TA2 copy, the system prompts you to enter the action date of the original TA2.

Create AFI File ESP - Company Inquiries Page

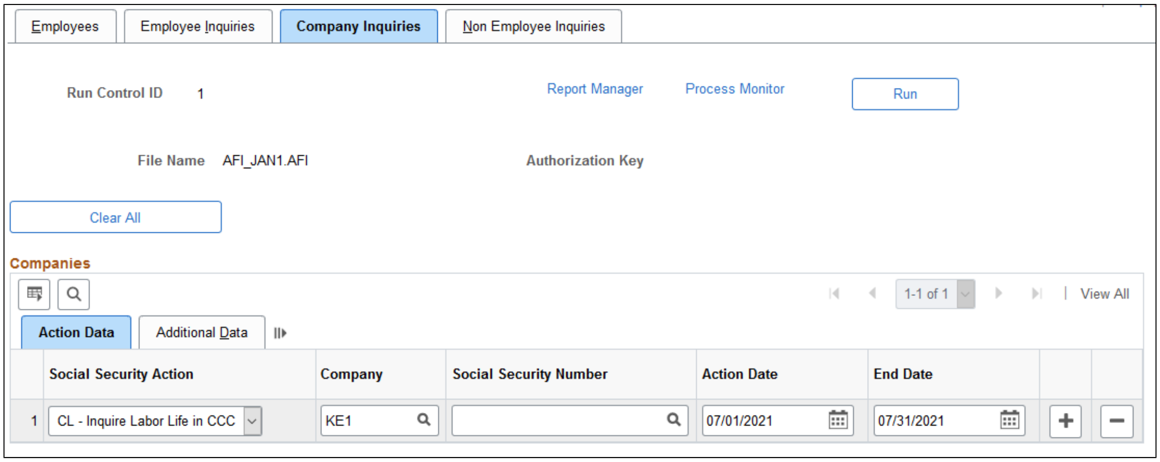
Use the Create AFI File ESP - Company Inquiries page (AFI_RC_3_ESP) to create inquiries to submit to the Social Security General Treasury about selected companies.

The AFI report process includes these inquiries in the AFI flat file that it generates.

Navigation:

Workforce Administration > **Workforce Reports** > **Create AFI File ESP** > **Company Inquiries**

This example illustrates the fields and controls on the Create AFI File ESP - Company Inquiries page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Clear All	Click this button to deselect all rows in the **Companies** grid on this page.
Company	Select the company for which you want to submit an inquiry to social security.
Social Security Number	Select the employer's social security number for which to submit an inquiry.

Field or Control	Description
Social Security Action	Select the inquiry that you want to submit to social security regarding the selected company. Possible inquires are: • *AAC - Certificated Authorization:* Select to request the Certificated Authorization to inquire other company data. The system asks for the Customer CCC in the Additional Data tab. • *CL - Inquire Labor Life in CCC:* Select to request the information that the Social Security General Treasury has about labor life in the CCC. • *CS - Inquire CCC Situation:* Select to request the information that the Social Security General Treasury has about the company. • *CT - Inquire Current CCC Workers:* Select to request the information that the Social Security General Treasury has about current workers in the CCC. • *CTA - ITA by Authorization Key:* Select to request the ITA (Affiliated Workers Report) by Authorization Key. • *CTP - ITA by Main CCC:* Select to request the ITA (Affiliated Workers Report) by Main Employer Social Security Number(CCC). • *CU - Inquire Previous CCC Movement:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC. • *PLC - Contribution/Period Company:* Select to request information on the contribution data for company employees for Settlement Period. • *PMT - Average Company Staff:* Select to request information on average company staff.
Action Date	System prompts you to enter the start date of the period you are asking for information about. This is applicable for actions: *AAC, CL, PLC,* and *PMT.*
End Date	System prompts you to enter the end date of the period you are asking for information about. This is applicable for actions: *AAC, CL,* and *PMT.*
Customer CCC	Enter the complete Employer SSN (CCC) including the scheme for customer to request the authorization. This is applicable for the action: *AAC.* **Note:** Click the **Additional Data** tab to view this field.

Create AFI File ESP - Non Employee Inquiries Page

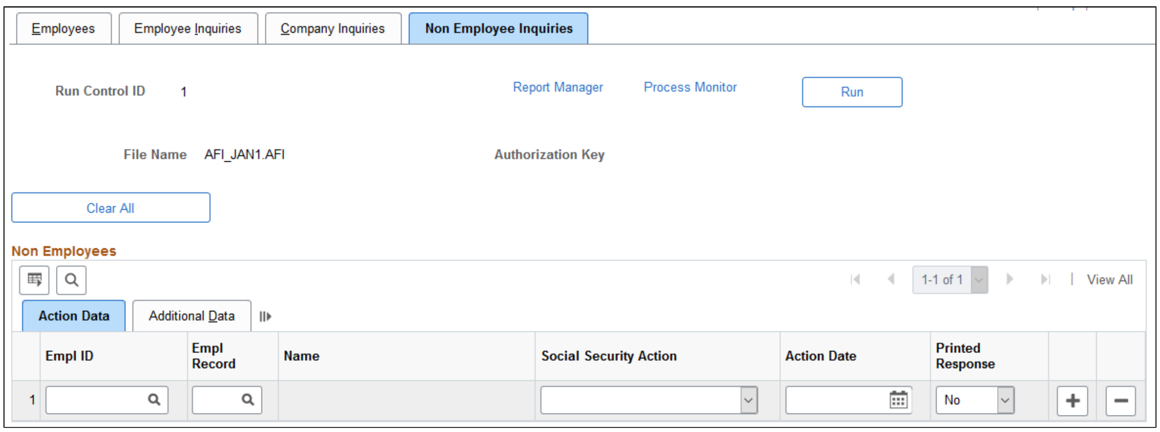
Use the Create AFI File ESP - Employee Inquiries page (AFI_RC_4_ESP) to create inquiries to submit to the Social Security General Treasury about selected employees.

The AFI report process includes these inquiries in the AFI flat file that it generates.

Navigation:

Workforce Administration > **Workforce Reports** > **Create AFI File ESP** > **Non Employee Inquiries**

This example illustrates the fields and controls on the Create AFI File ESP - Non Employee Inquiries page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Clear All	Click this button to deselect all rows in the Non Employees grid on this page.
Empl ID and **Name**	Select the non employee for whom you want to submit an inquiry to the social security. On selecting the ID, the **Name** field populates the person's name.
Empl Record	If the person has more than one employee record linked to the employee ID, search and select the record against which you want to submit an enquiry.
Social Security Action	Select the inquiry that you want to submit to social security regarding the selected person. The value available in the list is *CTO - Contractor Inquire*.
Action Date	Enter the date for which you want to submit an enquiry.

Field or Control	Description
Printed Response	Select whether you want a printed response from the Social Security General Treasury for the person's AFI information. The values are: • *Contribution Data Report (IDC)*: Indicates that you do not want a printed response for your inquiry, but would like to receive information on the contribution data for the person. • *No*: Indicates that you do not want a printed response for your inquiry. • *Print Resolution*: Indicates that you do want a printed response for your inquiry. • *Print Resolution + IDC*: Indicates that you want both a printed response for your inquiry, and information on the contribution data for the person.

Chapter 20

(ESP) Managing the Spanish Redundancy Procedure (ERE)

Understanding ERE

ERE is the administrative procedure under Spanish legislation that companies must follow when requesting a temporary suspension of labor contracts or a collective dismissal because of economic, technological, organizational, or productive reasons, or due to force majeure. Such action requires the agreement of the workers' representatives or, failing this, prior official authorization from the administrative authorities. The administrative authority would be either the Ministry of Employment and Immigration or the Regional Employment Ministry depending on the location of the affected employees.

When a company is forced to perform a massive reduction in force, ERE grants Social Security benefits if the company chooses not to terminate their employees, but rather suspend them temporarily. In addition, ERE provides financial support to employees who are terminated.

Oracle provides all the tools you need to manage the ERE procedure enabling you to enter required data, adjust reductions in contribution and compensation, and generate the reports to communicate required data to legal entities (Social Security and SPEE).

Types of ERE Actions

For a given ERE event, a company can take the following actions for its employees:

- Permanent termination: Employees who are terminated permanently are provided an indemnity payment from the company. In addition, terminated employees are eligible to receive unemployment benefits paid by the Servicio Público de Empleo Estatal (SPEE).
- Suspension: This action results in the temporary suspension of employees. During this suspension, employees don't work at all and receive a monthly benefit paid by SPEE. At the end of the suspension, employees return to their jobs and receive their normal monthly wage.
- Work Schedule Reduction: This action results in a reduced work schedule for affected employees. Their work schedule is reduced either by the number of days worked per month, or the hours worked per day. During the work schedule reduction, employees receive a portion of their wages from their company based on the hours or days worked. In addition, they receive some unemployment benefits from SPEE to make up for wages lost due to their reduced work schedule.

Defining an ERE Event

The first step in the ERE procedure is to define an ERE event. The ERE Data ESP (ERE_DATA_ESP) component enables you to define an ERE event at a collective level. The system uses the data defined for the event for reporting and payroll purposes.

These topics discuss how to define and ERE event.

Pages Used to Define an ERE Event

Page Name	*Definition Name*	*Usage*
ERE Data ESP - Definition Page	ERE_DATA_ESP	Create an ERE data definition.
ERE Data ESP - Payroll Page	ERE_DTA_BNF_ESP	Set up ERE payroll data.
ERE Data ESP - Status/Documents Page	ERE_DTA_DOC_ESP	Define ERE statuses and documentation.

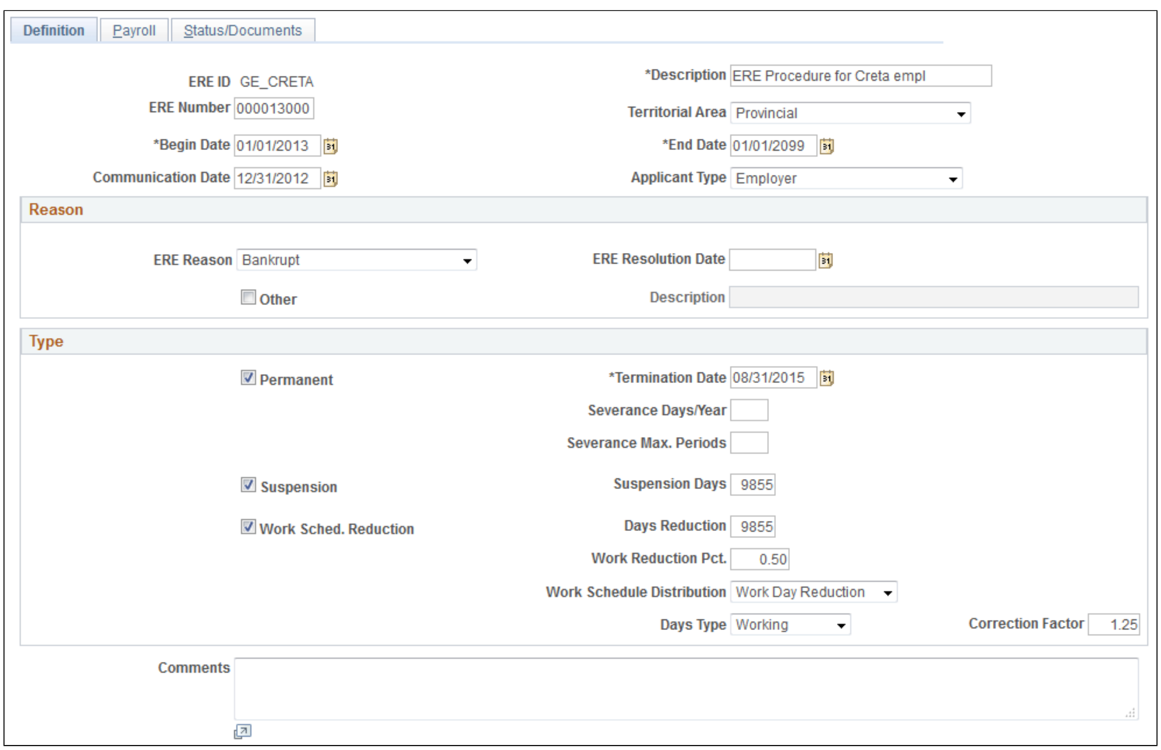
ERE Data ESP - Definition Page

Use the ERE Data ESP - Definition page (ERE_DATA_ESP) to create an ERE data definition.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Data ESP**

This example illustrates the fields and controls on the ERE Data ESP - Definition page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
ERE Number	Enter the unique ERE number that is provided by the labor authority that is administrating the ERE event.
Territorial Area	Select to indicate if the ERE procedure is national, autonomic or provincial.
Begin Date and End Date	Enter the date range for the ERE event.
Communication Date	Enter the date on which the ERE event is communicated to the affected employees and their representatives.
Applicant Type	Select the entity who is applying for the ERE event. Valid values are: Employee's Representative, Employees, and Employer.

Reason

Field or Control	*Description*
ERE Reason	Select the reason for initiating the ERE procedure. The values available are: • Bankrupt • Economical • Force Majeure • Organizational • Production • Technological
ERE Resolution Date	If you select *Bankrupt* as the reason for initiating ERE procedure, the **ERE Resolution Date** field is displayed and you can specify the date.
Other	Select this check box if the reason for initiating ERE procedure is other than the ones listed in the **ERE Reason** field.
Description	If you select the **Other** check box, enter a description of the reason for initiating the ERE procedure.

Type

Field or Control	*Description*
Permanent	Select to indicate that permanent terminations are included in the ERE event. When you select this check box, the **Termination Date**, **Days/Years**, and **Max Period** fields become available. **Note:** If you select this check box, the Permanent ERE (ERE _PERM_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.
Termination Date	Enter the date on which the terminations associated with the ERE event take effect.
Severance Days/Years	Enter the number of days by year of service that the payroll process uses when calculating severance pay amounts for employees affected by permanent ERE.
Severance Max Periods (maximum period)	Enter the maximum number of periods that the payroll process uses when calculating the severance pay amounts for employees affected by permanent ERE.
Suspension	Select to indicate that suspensions are included in the ERE event. When you select this check box, the **Suspension Days** field becomes available. **Note:** If you select this check box, the Suspension ERE (ERE _SUSP_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.
Suspension Days	Enter the length of the suspension in days.
Work Sched. Reduction (work schedule reduction)	Select to indicate that work schedule reductions are included in the ERE event. When you select this check box, the Days Reduction, Work Reduction Pct., and Work Schedule Distribution fields become active. **Note:** If you select this check box, the Work Reduction ERE (ERE_WSRD_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.

Field or Control	***Description***
Days Reduction	Enter the number of days by which the ERE event reduces the work schedule of employees affected by work schedule reduction ERE.
Work Reduction Pct. (work reduction percentage)	Enter the percentage by which the ERE event reduces the work schedule of employees affected by work schedule reduction ERE.
Work Schedule Distribution	Select whether the work schedule reduction is a *Daily Hours Reduction* or a *Work Day Reduction*. If you select the *Work Day Reduction* value, the **Days Type** field becomes available.
Days Type	Select whether the work day reduction is for *Natural* days or *Working* days. If you select the *Working* value, the **Correction Facto**r field becomes available.
Correction Factor	Enter the correction coefficient that the payroll process uses when calculating ERE days to account for holidays and weekends. This factor applies to work schedule reductions comprising work days with days not worked.

Comments

Enter any additional comments for the ERE event.

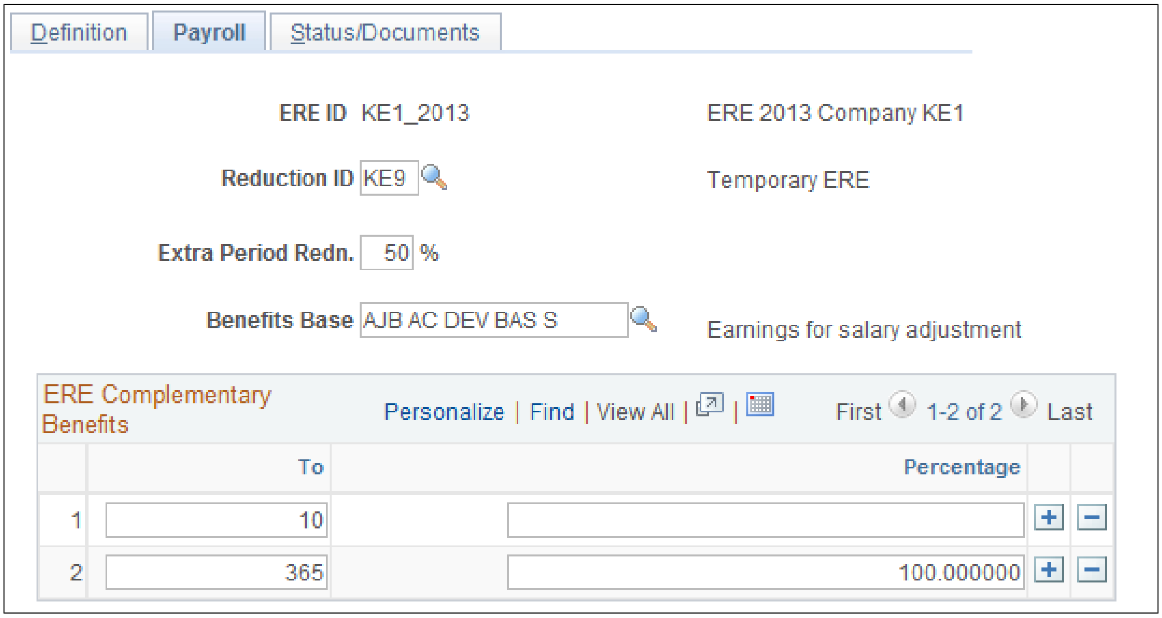
ERE Data ESP - Payroll Page

Use the ERE Data ESP - Payroll page (ERE_DTA_BNF_ESP) to set up ERE payroll data.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Data ESP** > **Payroll**

This example illustrates the fields and controls on the ERE Data ESP - Payroll page. You can find definitions for the fields and controls later on this page.



Use this page to define how the system updates payroll data for employees affected by the two types of temporary ERE: suspensions and work schedule reductions.

Field or Control	***Description***
Reduction ID	Enter the Social Security reduction ID for the ERE event. You define reduction IDs on the Reduction page.
Extra Period Redn. (extra period reduction)	Enter the percentage by which the system reduces extra period days for employees affected by temporary ERE.
Benefits Base	Enter the accumulator that the system uses as the basis for calculating the ERE complementary benefits of employees affected by temporary ERE. These are the complementary benefits paid by the company in addition to the subsidy paid by SPEE.

ERE Complementary Benefits

Use this group box to define complementary benefits received due to the ERE event.

Field or Control	Description
To	Define the period for the benefit (usually the number of days up to a certain day). For example, if you enter 4 in the first row, then from days 1–4 (up to day 4) of absence due to ERE, the employee receives a specified percentage. If you enter 5 in the second row, then for day 5, the employee receives another specified percentage. If you enter 10 in the third row, then from days 6–10, the employee receives another specified percentage.
Percentage	Define the percentage of the benefit base that an employee receives in ERE complementary benefits. For example, if you enter 100, employees receive 100 percent of the benefit base during the specified period.

Related Links

“Viewing and Defining Social Security Ceilings, Rates, and Bases” (PeopleSoft Global Payroll for Spain)

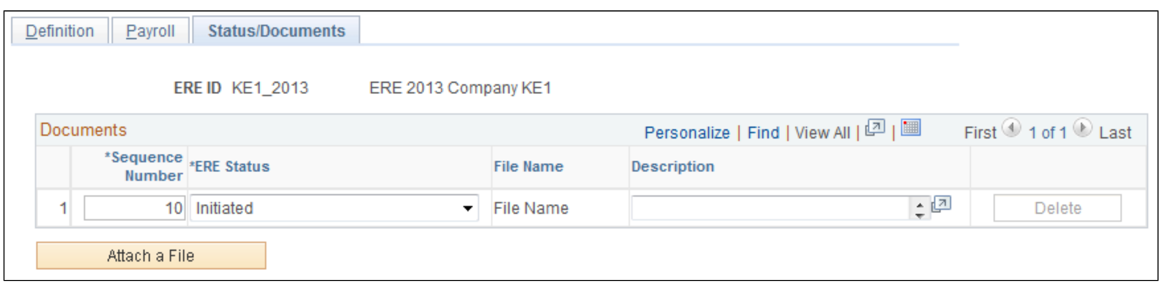
ERE Data ESP - Status/Documents Page

Use the ERE Data ESP - Status/Documents page (ERE_DTA_DOC_ESP) to define ERE statuses and documentation.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Data ESP** > **Status/Documents**

This example illustrates the fields and controls on the ERE Data ESP - Status/Documents page. You can find definitions for the fields and controls later on this page.



Use this page to enter a status for each step in the ERE procedure. Along with each step in the procedure, you can attach any associated documentation.

Field or Control	Description
Sequence Number	Enter the sequence number for the step in the ERE procedure. By default, the system separates each step by 10.

Field or Control	*Description*
ERE Status	Enter the status for each step in the procedure. Valid values are: • Initiated • Requested • Rejected • Consultation Period • Accepted w/Agreement (accepted with agreement) • Accepted wo/Agreement (accepted without agreement) • Approved • Appealed You can use a given status more than once. For example, you might have two or more steps with a status of Consultation Period because each step in the consultation period is associated with a different document.
File Name	Displays a link to the attached file associated with the step in the ERE procedure. Click the link to open the file in a new browser window.
Description	Enter a description of the attached file.
Delete	Click to delete an attached file from the page. Once you delete the file, the step becomes unavailable to edit.
Attach a File	Click to attach a file to a new step in the ERE procedure.

Defining Company-Specific Details for an ERE Event

Once you have defined the collective ERE event, you must define the details for the one or more companies associated with the ERE event. These topics discuss how to define company-specific details for an ERE event.

Pages Used to Define Company-Specific Details for an ERE Event

Page Name	*Definition Name*	*Usage*
ERE Company Data ESP - Company Data Page	ERE_CMP_DTA_ESP	Define ERE company data.

Page Name	***Definition Name***	***Usage***
Representatives Page	ERE_REPREST_ESP	Define ERE representatives.
Distribution Page	ERE_CMP_DST_ESP	View ERE distribution information.

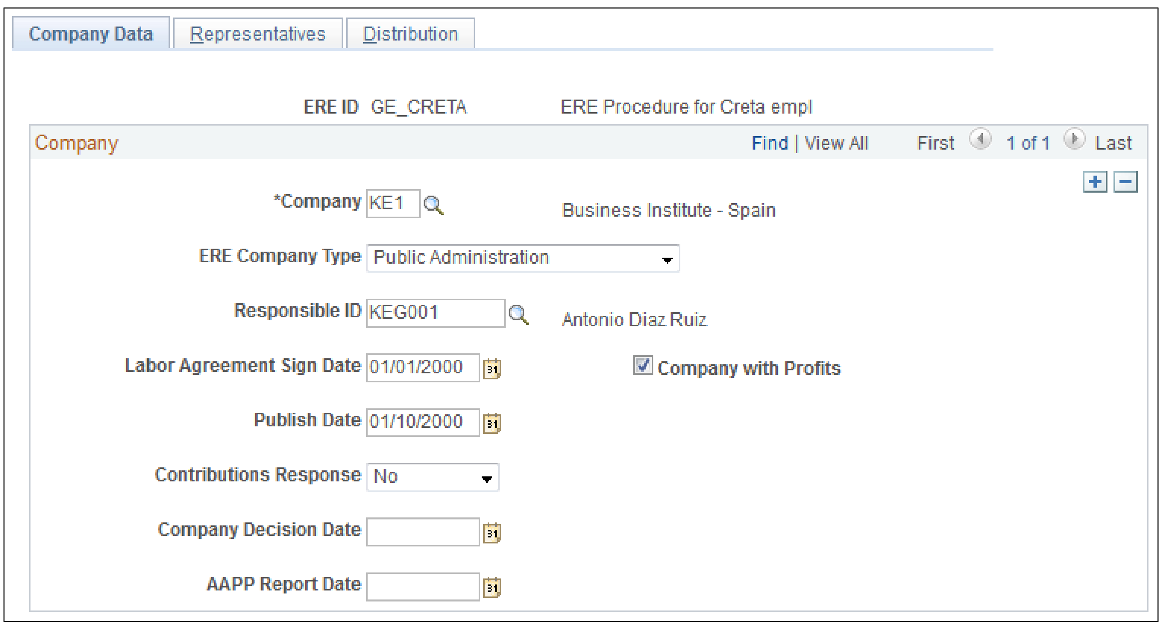
ERE Company Data ESP - Company Data Page

Use the Company Data page (ERE_CMP_DTA_ESP) to define ERE company data.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Company Data ESP**

This example illustrates the fields and controls on the Company Data page. You can find definitions for the fields and controls later on this page.



Use this page to define basic ERE information for the companies associated with an ERE event.

Field or Control	***Description***
Company	Enter the ID of the company associated with the ERE event.
ERE Company Type	Select the type of company associated with the ERE event. The possible values are: • Private Company • Public Administration • Other Public Sector

Field or Control	***Description***
Responsible ID	Enter the ID of the person responsible for managing the ERE event for the company.
Labor Agreement Sign Date	Enter the date on which the company's labor agreement was originally signed.
Company with Profits	Select if the company runs with profits or not.
Publish Date	Enter the official publication date of the company's labor agreement.
Contributions Response	Indicate whether the company wants to receive a reply from SPEE regarding the contributions in the XML file for employees affected by ERE. The company must have received permission from employees to request a response.
Company Decision Date	Enter the date on which the company communicates the decision about ERE, after the negotiation period with Labor Authorities.
AAPP Report Date	If you select *Public Administration* or *Other Public Sector* in the **ERE Company Type** field, the **AAPP Report Date** field appears.

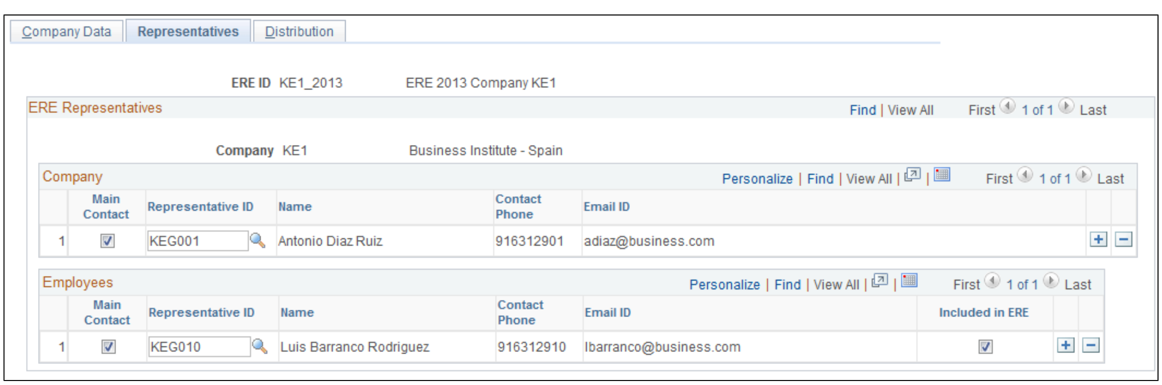
Representatives Page

Use the Representatives page (ERE_REPREST_ESP) to define ERE representatives.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Company Data ESP** > **Representatives**

This example illustrates the fields and controls on the Representatives page. You can find definitions for the fields and controls later on this page.



Use this page to identify the company and employee representatives for a company associated with an ERE event.

Company

Use this group box to define the representatives for the employees who work for the company undergoing the ERE event.

Field or Control	***Description***
Main Contact	Select to indicate the main contact for the employees. Only one employee representative can be designated as the main contact.
Representative ID	Enter the ID of the employee representative.
Name, Contact Phone, and Email ID	These fields display any name, telephone, or email information defined for the representative.

Employees

Field or Control	***Description***
Main Contact	Select to indicate the main contact for the employees. Only one employee representative can be designated as the main contact.
Representative ID	Enter the ID of the employee representative.
Name, Contact Phone, and Email ID	These fields display any name, telephone, or email information defined for the representative.
Included in ERE	Select to indicate that the representative’s employment is affected by the ERE event.

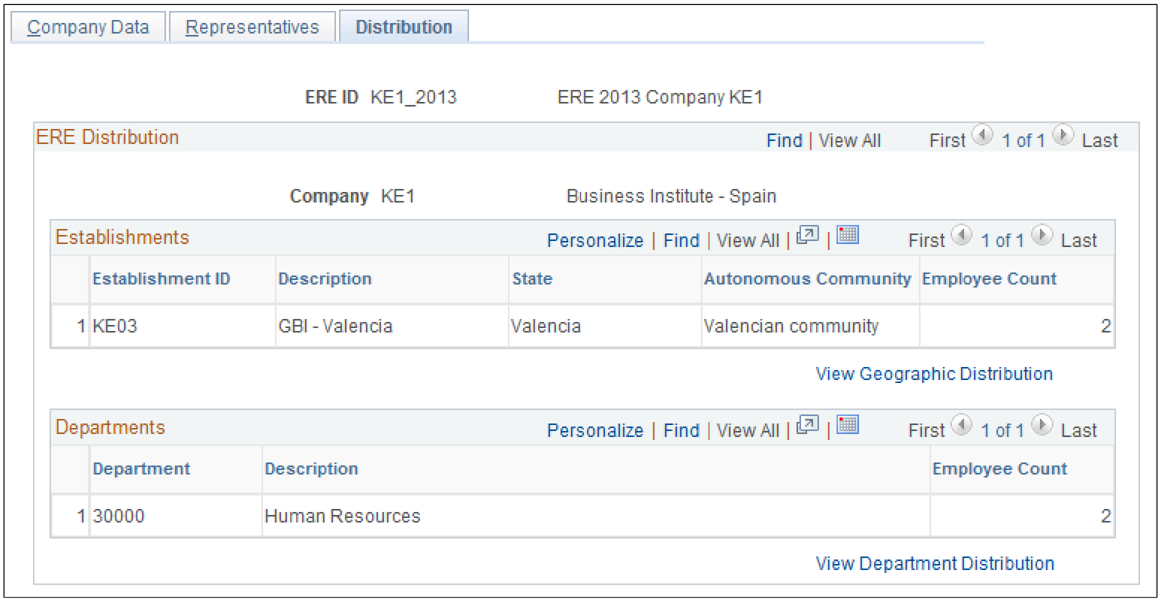
Distribution Page

Use the Distribution page (ERE_CMP_DST_ESP) to view ERE distribution information.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Company Data ESP** > **Distribution**

This example illustrates the fields and controls on the Distribution page. You can find definitions for the fields and controls later on this page.



This page lists the establishments and departments of the companies affected by the ERE event along with the count of affected employees. The data that is displayed on this page depends on the employees that you select on the pages of the ERE Employee Data ERE (ERE_EMPL_DTA_ESP) component for the ERE event.

Field or Control	***Description***
View Geographic Distribution	Click to view a pie chart that illustrates the geographic distribution of the establishments within the company undergoing the ERE event.
View Department Distribution	Click to view a pie chart that illustrates the distribution of departments within the company undergoing the ERE event.

Defining Employees Affected by an ERE Event

The pages of the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component enable you to determine which employees affected by permanent, suspension, and work schedule reduction ERE.

These topics discuss how to define employees affected by an ERE event.

Pages Used to Define Employees Affected by an ERE Event

Page Name	***Definition Name***	***Usage***
ERE Employee Data ESP - Permanent ERE page	ERE_PERM_EE_ESP	Select employees affected by permanent ERE.
Permanent ERE Employee Data Page	ERE_PERM_EE_X_ESP	Enter additional details for employees affected by permanent ERE.
Suspension ERE Page	ERE_SUSP_EE_ESP	Select employees affected by suspension ERE.
Suspension ERE Employee Data Page	ERE_SUSP_EE_X_ESP	Enter additional details for employees affected by suspension ERE.
Work Redn. ERE Page	ERE_WSRD_EE_ESP	Select employee affected by work schedule reduction ERE.
Work Reduction Employee Data Page	ERE_WSRD_EE_X_ESP	Enter additional details for employees affected by work schedule reduction ERE.
Schedule Reductn Distribution Page	ERE_WSRD_SEC_ESP	Enter the reduction periods and corresponding schedules.

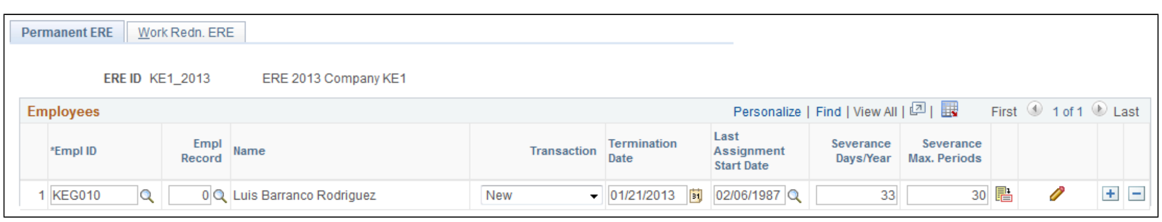
ERE Employee Data ESP - Permanent ERE page

Use the Permanent ERE page (ERE_PERM_EE_ESP) to select employees affected by permanent ERE.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Employee Data ESP**

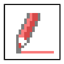
This example illustrates the fields and controls on the Permanent ERE page. You can find definitions for the fields and controls later on this page.



Use this page to select the employees who will be permanently terminated as part of the ERE event. This page appears for this component only if you select the Permanent check box on the ERE Data ESP - Definition page for the ERE event.

Note: Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

Field or Control	***Description***
Empl ID and **Name**	Enter the ID of the employee you want to terminate through permanent ERE. Once you select the employee ID, the **Name** field is automatically populated.
Empl Record (employment record)	If the employee has multiple employment records, enter the employment record you want to add to the permanent ERE.
Transaction	Select if you are creating, updating or deleting an ERE event for an employee. The values available are: • *New*: When you add a new row for an employee, the field displays *New* as the default value. • *Update*: Before you run the ERE Data process, you can manually change the **Transaction** field value to *Update*. On the other hand, once you run the ERE Data process, if you edit the details by clicking the **Correction** button, the **Transaction** field automatically changes to *Update*. • *Delete*: Select this value if you want to delete an entry.
Termination Date	Enter the date on which the terminations associated with the ERE event take effect. By default, the system populates this field with the value you entered on the ERE Data ESP - Definition page for the ERE event.
Last Assignment Start Date	Enter the begin date of the last labor relationship.
Severance Days/Year	Enter the number of days by year of service that the payroll process uses when calculating the severance pay amounts for employees affected by permanent ERE. If you entered a value in the **Severance Days/Year** field on the ERE Data ESP - Definition page for the ERE event, that value appears in this field by default.
Severance Max. Periods	Enter the maximum number of periods that the payroll process uses when calculating the severance pay amounts for employees affected by permanent ERE. If you entered a value in the **Max Periods** field on the ERE Data ESP - Definition page for the ERE event, that value appears in this field by default.
	Click the details icon to access the Permanent ERE Employee Data page.

Field or Control	Description
	Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_UDTA_ESP) process. **Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

Related Links

Updating Affected Employee Job and Payroll Data

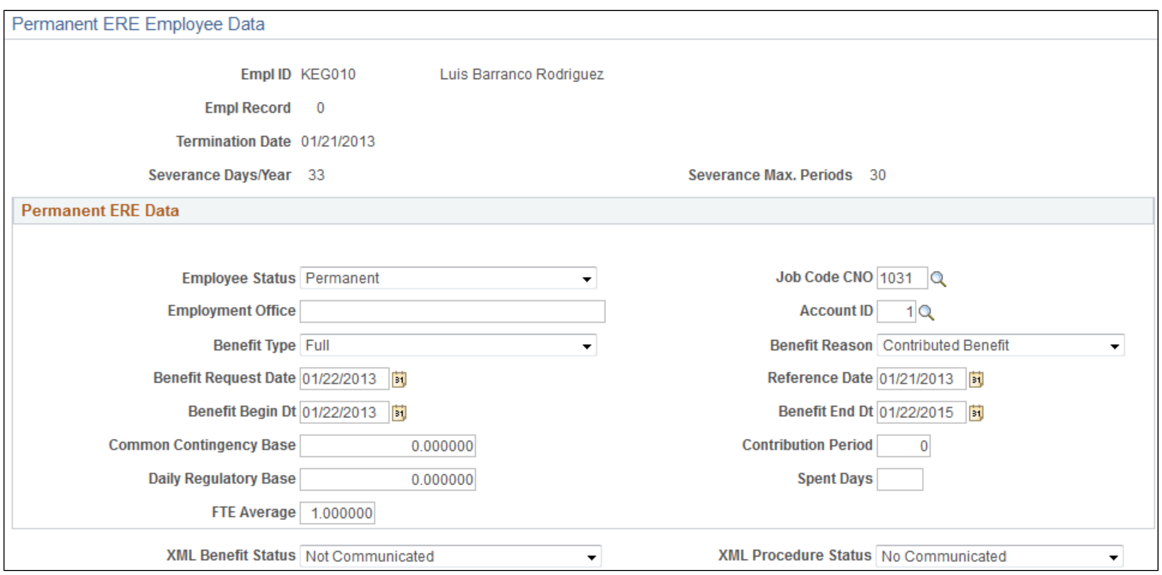
Permanent ERE Employee Data Page

Use the Permanent ERE Employee Data page (ERE_PERM_EE_X_ESP) to enter additional details for employees affected by permanent ERE.

Navigation:

Click the **Details** icon for an employee on the Permanent ERE page.

This example illustrates the fields and controls on the Permanent ERE Employee Data page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Employee Status	Select the employment status for the employee.
Job Code CNO	Enter the official occupation code for the employee.

Field or Control	***Description***
Employment Office	Enter the unemployment office that manages the subsidy for the employee.
Account ID	Enter the employee's bank account ID.
Benefit Type	Select whether the employee has Full or Partial benefits.
Benefit Reason	Select whether the reason for the benefit. Values are *Contributed Benefit* and *Replenish Benefit Entitlement*.
Benefit Request Date	Enter the date on which the benefit is requested.
Reference Date	Enter the date that the system uses to calculate the maximum and minimum ceilings for the contributive unemployment benefit.
Benefit Begin Dt and Benefit End Dt	Enter a date range for the benefit.
Common Contingency Base	Displays the sum of common contingencies bases for the last 180 contribution days. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Contribution Period	Displays the contribution days used to calculate the daily regulatory base. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Daily Regulatory Base	Displays the Daily Regulatory Base that is derived from the Professional Contingencies bases (without overtime) for the last 180 contribution days. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Spent Days	Enter the number of unemployment days that the employee has used as part of a prior ERE event. The Process ERE Data (ERE_UDTA_ESP) process updates the Decimal 4 field on the Absence Event Input Detail page to account for these days during the payroll process.

Field or Control	***Description***
FTE Average	Displays the average FTE for the last 180 days. System calculates the value automatically when running the Process ERE data (ERE_UDTA_ESP) process. However, you can also manually update it.
XML Benefit Status	Displays the status of employee's Benefits registration. • *Not Communicated* • *XML Generated* • *XML Sent/Confirmated*
XML Procedure Status	Select the status of the employee's ERE report in XML. The values are: The values are: • *No Communicated* • *XML Generated*

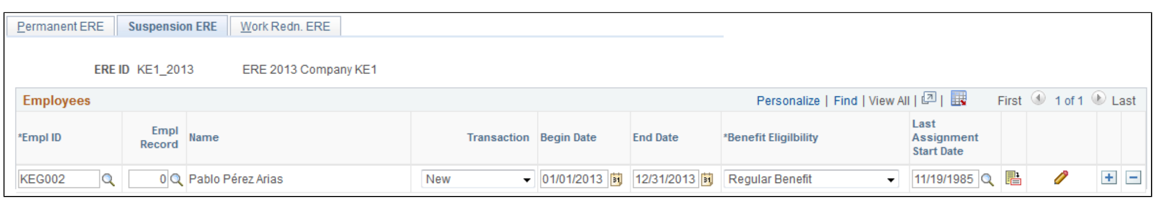
Suspension ERE Page

Use the Suspension ERE page (ERE_SUSP_EE_ESP) to select employees affected by suspension ERE.

Navigation:

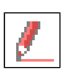
Workforce Administration > **ERE Procedure ESP** > **ERE Employee Data ESP** > **Suspension ERE**

This example illustrates the fields and controls on the Suspension ERE page. You can find definitions for the fields and controls later on this page.



Use this page to select the employees who will be suspended as part of the ERE event. This page appears for this component only if you select the **Suspension** check box on the ERE Data ESP - Definition page for the ERE event.

Note: Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

Field or Control	***Description***
Empl ID and **Name**	Enter the ID of the employee you want to suspend. Once you select the Employee ID, the employee name is automatically populated in the **Name** field.
Empl Record (employment record)	If the employee has multiple employment records, enter the employment record you want to add to the suspension ERE.
Transaction	Select if you are creating, updating or deleting an ERE event for an employee. The values available are: • *New*: When you add a new row for an employee, the field displays New as the default value. • *Update*: Before you run the ERE Data process, you can manually change the Transaction field value to *Update*. On the other hand, once you run the ERE Data process, if you edit the details by clicking the **Correction** button, the **Transaction**field value automatically changes to *Update*. • *Delete*: Select this value if you want to delete an entry.
Begin Date and End Date	Enter the date range of the employee's suspension. By default, the system populates these fields using the values of the **Begin Date** and **End Date** fields on the ERE Data ESP - Definition page.
Benefit Eligibility	Select the employee's benefit eligibility. Values are: *No Benefit*, *Regular Benefit*, and *Special Subsidy*. By default, this field has a value of *Regular Benefit*.
Last Assignment Start Date	Enter the begin date of last labor relationship.
	Click the details icon to access the Suspension ERE Employee Data page.
	Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_ UDTA_ESP) process. **Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

Related Links

Updating Affected Employee Job and Payroll Data

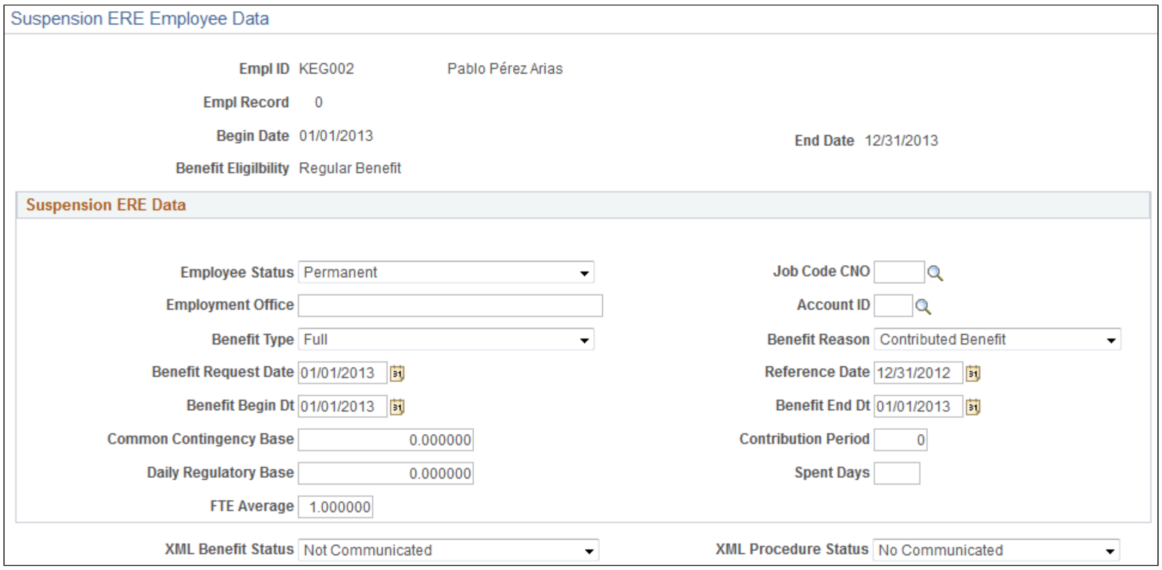
Suspension ERE Employee Data Page

Use the Suspension ERE Employee Data page (ERE_SUSP_EE_X_ESP) to enter additional details for employees affected by suspension ERE.

Navigation:

Click the **Details** icon for an employee on the Suspension ERE page.

This example illustrates the fields and controls on the Suspension ERE Employee Data page. You can find definitions for the fields and controls later on this page.



The fields on this page are identical to those on the Permanent ERE Employee Data page.

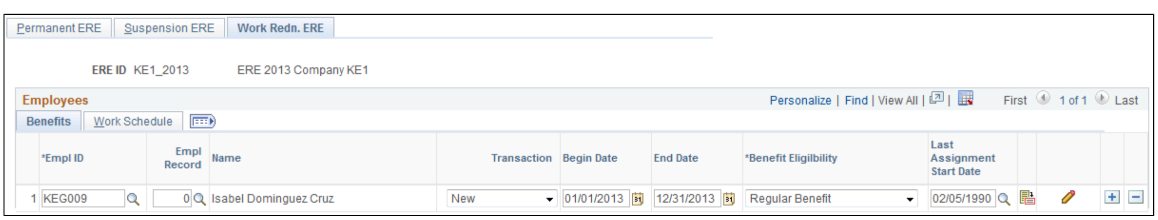
Work Redn. ERE Page

Use the Work Redn. ERE page (ERE_WSRD_EE_ESP) to select employee affected by work schedule reduction ERE.

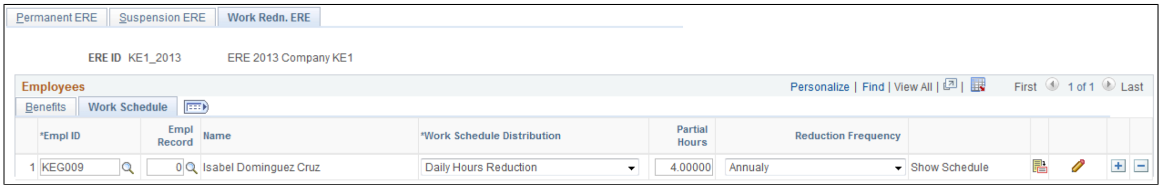
Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Employee Data ESP** > **Work Reduction ERE**

This example illustrates the fields and controls on the Work Redn. ERE page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Work Redn. ERE page (2 of 2). You can find definitions for the fields and controls later on this page.



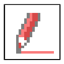
Use this page to select the employees whose work schedule is reduced as part of the ERE event. This page appears for this component only if you select the **Work Sched. Reduction** check box on the ERE Data ESP - Definition page for the ERE event.

Note: Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

Field or Control	***Description***
Empl ID and **Name**	Enter the ID of the employee whose work schedule you are reducing. Once you select the Employee ID, the employee name is automatically populated in the **Name** field.
Empl Record (employment record)	If the employee has multiple employment records, select the employment record you want to add to the work reduction ERE.
Transaction	Select if you are creating, updating or deleting an ERE event for an employee. The values available are: • *New*: When you add a new row for an employee, the field displays New as the default value. • *Update*: Before you run the ERE Data process, you can manually change the Transaction field value to *Update*. On the other hand, once you run the ERE Data process, if you edit the details by clicking the **Correction** button, the **Transaction**field value automatically changes to *Update*. • *Delete*: Select this value if you want to delete an entry.
Begin Date and End Date	Enter the date range of the employee's work schedule reduction. By default, the system populates these fields using the values of the **Begin Date** and **End Date** fields on the ERE Data ESP - Definition page.
Benefit Eligibility	Select the employee's benefit eligibility. Values are: *No Benefit*, *Regular Benefit*, and *Special Subsidy*. By default, this field has a value of Regular Benefit.
Last Assignment Start Date	Enter the begin date of last labor relationship.

Work Schedule Tab

Field or Control	***Description***
Empl ID and **Name**	Enter the ID of the employee whose work schedule you are reducing. Once you select the Employee ID, the employee name is automatically populated in the **Name** field.
Empl Record	If the employee has multiple employment records, select the employment record you want to add to the work reduction ERE.
Work Schedule Distribution	Select whether the work schedule reduction is a Daily Hours Reduction or a Work Day Reduction. If you select *Daily Hours Reduction*, the **Partial Hours** field becomes available. If you select *Work Day Reduction*, the **Show Schedule** link becomes available. By default, the value of this field matches the value you selected in the **Work Schedule Distribution** field on the ERE Data ESP - Definition page.
Partial Hours	Enter any partial hours associated with the employee's reduction in daily hours.
Reduction Frequency	Select the frequency at which the reduction need to apply. The possible values are: • Annualy • Daily • Monthly • Weekly
Show Schedule	Click to access the Assign Work Schedule page and enter an alternative work schedule that specifies the working days during the period affected by ERE. **Note:** This link is enabled when you select *Work Day Reduction* for a record.
	Click the details icon to access the Work Reduction Employee Data page.

Field or Control	Description
	Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_UDTA_ESP) process. **Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

Related Links

Updating Affected Employee Job and Payroll Data

"Assigning Schedules" (PeopleSoft Time and Labor)

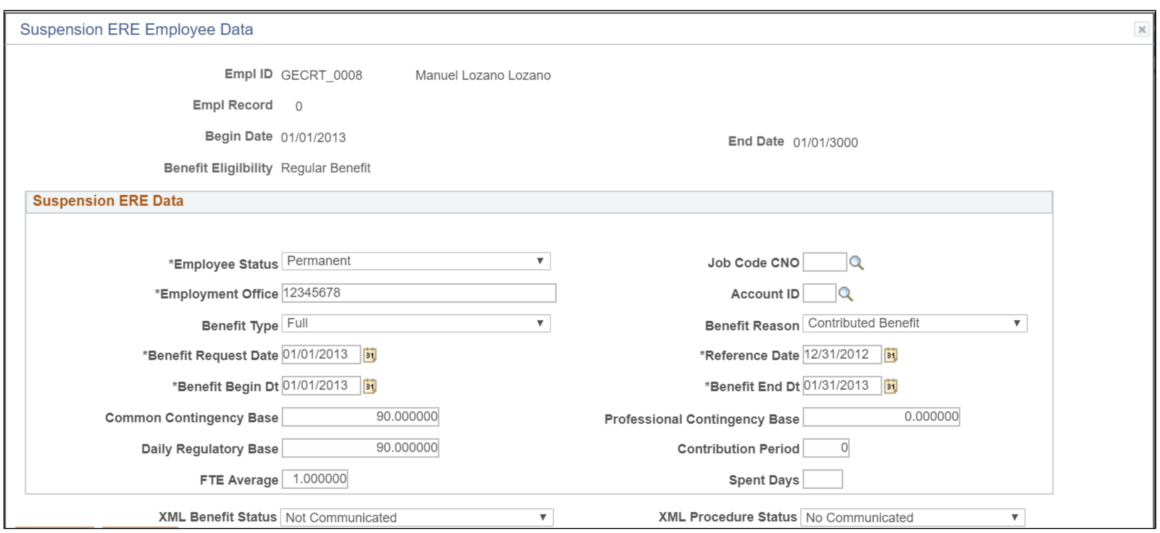
Work Reduction Employee Data Page

Use the Work Reduction Employee Data page (ERE_WSRD_EE_X_ESP) to enter additional details for employees affected by work schedule reduction ERE.

Navigation:

Click the **Details** icon for an employee on the Work Redn. ERE page.

This example illustrates the fields and controls on the Work Reduction Employee Data page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Schedule Distribution	Click the link to open the Schedule Reductn Distribution page wherein you enter reduction periods and work schedules for each employee.

Field or Control	***Description***
Employee Status	Select the employment status for the employee.
Job Code CNO	Enter the official occupation code for the employee.
Employment Office	Enter the unemployment office that manages the subsidy for the employee.
Account ID	Enter the employee's bank account ID.
Sched Reduction Reason	Select the reason for the schedule reduction.
Work Reduction Pct	Displays the work schedule reduction percentage during the temporary ERE.
Benefit Type	Select whether the employee has Full or Partial benefits.
Benefit Reason	Select whether the reason for the benefit. Values are Contributed Benefit and Replenish Benefit Entitlement.
Benefit Request Date	Enter the date on which the benefit is requested.
Reference Date	Enter the date that the system uses to calculate the maximum and minimum ceilings for the contributive unemployment benefit.
Benefit Begin Dt and **Benefit End Dt**	Enter a date range for the benefit.
Common Contingency Base	Displays the sum of common contingencies bases for the last 180 contribution days. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Contribution Period	Displays the number of contribution days used to calculate the daily regulatory base. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Professional Contingency Base	Displays the Daily Regulatory Base that is derived from the Professional Contingencies bases (without overtime) for the last 180 contributing days.

Field or Control	***Description***
Daily Regulatory Base	Displays the Daily Regulatory Base that is derived from the Professional Contingencies bases (without overtime) for the last 180 contribution days. For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process.
Spent Days	Enter the number of unemployment days that the employee has used as part of a prior ERE event. The Process ERE Data (ERE_UDTA_ESP) process updates the Decimal 4 field on the Absence Event Input Detail page to account for these days during the payroll process.
FTE Average	Displays the average FTE for the last 180 days. System calculates the value automatically when running the Process ERE data (ERE_UDTA_ESP) process. However, you can also manually update it.
XML Benefit Status	Displays the status of employee’s Benefits registration. • *Not Communicated* • *XML Generated* • *XML Sent/Confirmated*
XML Procedure Status	Select the status of the employee’s XML ERE report. The values are: The values are: • *No Communicated* • *XML Generated*

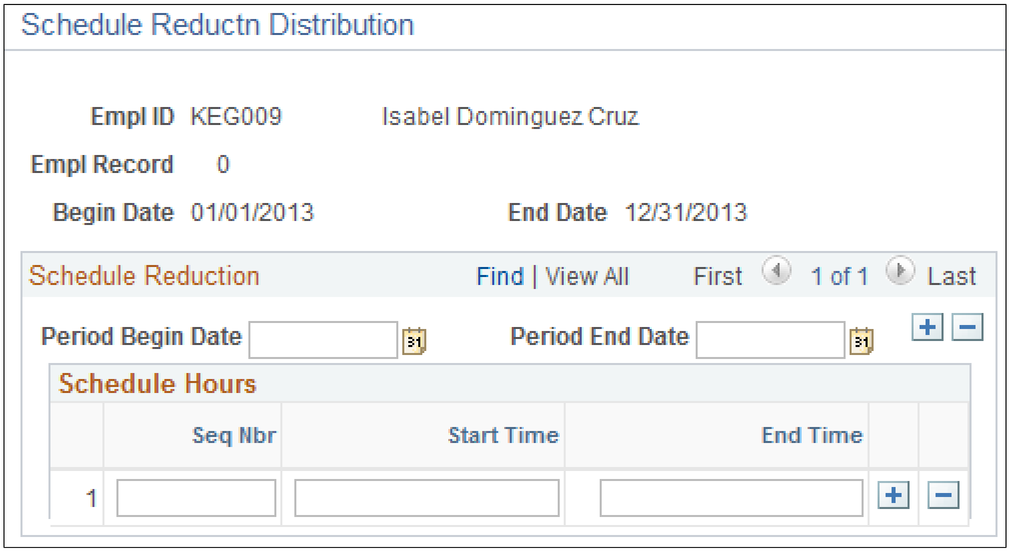
Schedule Reductn Distribution Page

Use the Schedule Reductn Distribution page (ERE_WSRD_SEC_ESP) to enter the reduction periods and corresponding schedules (worked part) in case of work reduction ERE.

Navigation:

Click the **Schedule Distribution** link on the Work Reductn ERE Employee Data page.

This example illustrates the fields and controls on the Schedule Reductn Distribution Page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Period Begin Date and **Period End Date**	Select begin and end dates of the work reduction period.
Seq Nbr	Enter the sequence in which the schedules within the reduction period are defined.
Start Time and **End Time**	Enter the start and end time for each schedule within the reduction period.

Updating Affected Employee Job and Payroll Data

Properly adjusting the job and payroll data for all employees affected by an ERE event requires updating up to five separate components in PeopleSoft HCM and PeopleSoft Global Payroll for Spain. Oracle provides a batch process that enables you to perform all of these updates automatically. The process makes updates based on the types of ERE you are processing and the data actions that you define on the Process ERE data actions ESP page.

Permanent ERE

For employees affected by permanent ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for permanent ERE on the Process ERE data actions ESP page. This action has an effective date equal to one day after the termination date defined for the ERE event.
- Creates a new record on the Contract Status/Content page of the Update Contracts component with a Contract End Date equal to the termination date defined for the ERE event.

- Creates a new record on the Manage Terminations ESP page with the Termination Reason that you specify for Permanent ERE on the Process ERE data actions ESP page. The effective date of the record is equal to the termination date defined for the ERE event. In addition, the system uses the statutory values for Days/Year and Max Periods to calculate severance pay.
- For customers who have Global Payroll installed, calculates the following values and enters them on the Permanent ERE Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

Suspension ERE

For employees affected by suspension ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for suspension ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.
- Creates a row on the Absence Event Entry page of the Absence Event ESP page using the Absence Take Element you specify for suspension ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined for the ERE event.
- For customers who have Global Payroll installed, calculates the following values and enters them on the Suspension ERE Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

Daily Hours Reduction ERE

For employees affected by daily hours reduction ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for daily hours reduction ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.

- Creates a row on the Absence Event Entry page of the Absence Event ESP component using the Absence Take Element you specify for daily hours reduction ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined for the ERE event. In addition, the system enters partial hours for the absence event if you entered a value in the Partial Hours field on the Work Redn. ERE page.
- For customers who have Global Payroll installed, calculates the following values and enters them on the Work Reduction Employee Data page:
  - Common Contingency Base
  - Contribution Days
  - Daily Contributing Base

Work Day Reduction ERE

For employees affected by work day reduction ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for work day reduction ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.
- Creates a row on the Absence Event Entry page of the Absence Event ESP component using the Absence Take Element you specify for work day reduction ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined for the ERE event
- For customers who have Global Payroll installed, calculates the following values and enters them on the Work Reduction Employee Data page:
  - Common Contingency Base
  - Contribution Days
  - Daily Contributing Base

Pages Used to Update Affected Employee Job and Payroll Data

Page Name	***Definition Name***	***Usage***
Process ERE data actions ESP Page	ERE_UDTA_ACTN_ESP	Define ERE data actions.
Process ERE Data ESP Page	ERE_RC_UPD_DTA_ESP	Process ERE data.

Related Links

Work Location Page

Contract Status/Content Page

"Manage Terminations ESP Page" (PeopleSoft Global Payroll for Spain)

"Entering Absence Events" (PeopleSoft Global Payroll for Spain)

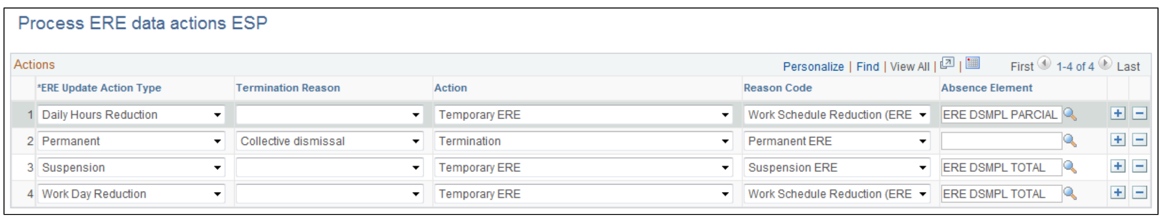
Process ERE data actions ESP Page

Use the Process ERE data actions ESP page (ERE_UDTA_ACTN_ESP) to define ERE data actions.

Navigation:

Set Up HCM > Install > Country Specific > Process ERE data actions ESP

This example illustrates the fields and controls on the Process ERE data actions ESP page. You can find definitions for the fields and controls later on this page.



Use this page to determine how the system updates job and payroll data for employees for each of the different types of ERE actions.

Field or Control	***Description***
ERE Update Action Type	Select the ERE update action type you are defining. Valid values are: *Daily Hours Reduction*, *Permanent*, *Suspension*, and *Work Day Reduction*.
Termination Reason	Select the termination reason that the system uses when updating the Manage Terminations ESP page when you run the Process ERE Data (ERE_UDTA_ESP) process. Typically you select a value in this field only for the *Permanent* ERE update action type.
Action	Select the action that the system uses when updating the Work Location page of the Job Data component when you run the Process ERE Data (ERE_UDTA_ESP) process.
Reason Code	Select the reason that the system uses when updating the Work Location page when you run the Process ERE Data (ERE_UDTA_ESP) process.

Field or Control	***Description***
Absence Element	Enter the absence take element that the system uses to update the Absence Event Entry page when you run the Process ERE Data (ERE_UDTA_ESP) process. Oracle delivers the following ERE absence takes: • *ERE DSMPL PARCIAL:* This should be mapped to the daily hours reduction ERE action type. • *ERE DSMPL TOTAL:* This should be mapped to the suspension and work day reduction ERE action types.

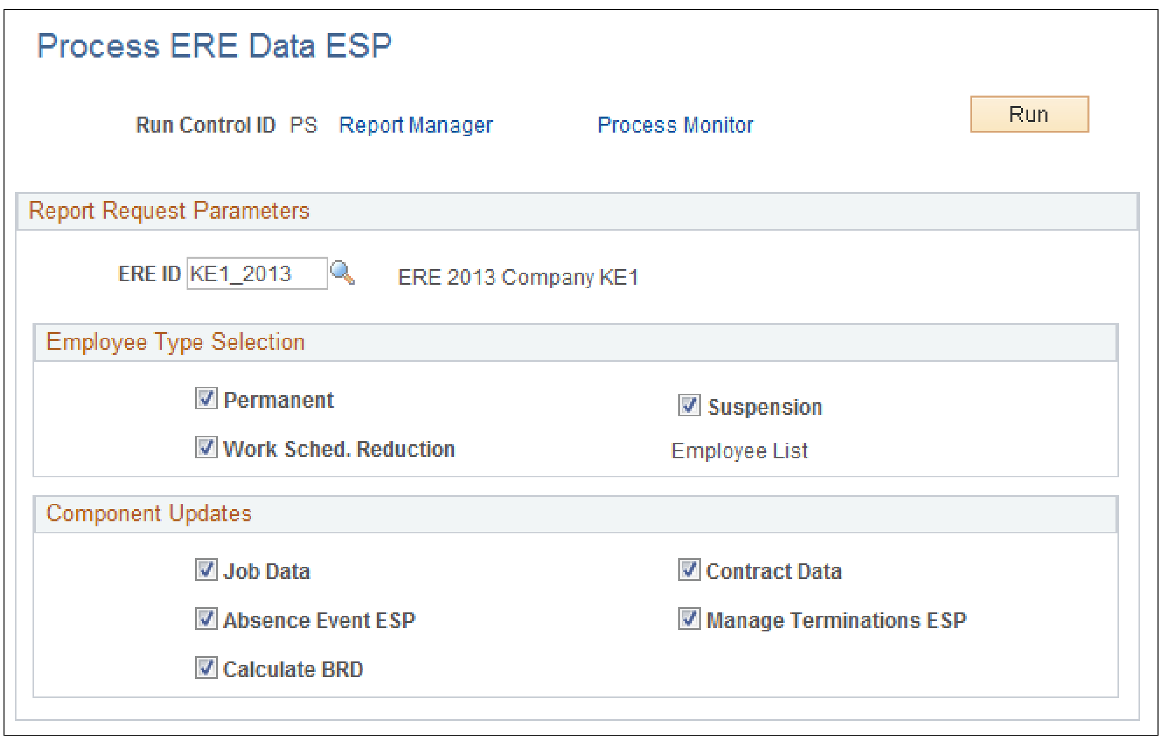
Process ERE Data ESP Page

Use the Process ERE Data ESP page (ERE_RC_UPD_DTA_ESP) to process ERE data.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **Process ERE Data ESP**

This example illustrates the fields and controls on the Process ERE Data ESP page. You can find definitions for the fields and controls later on this page.



Use this page to run the Process ERE Data (ERE_UDTA_ESP) process.

Field or Control	***Description***
ERE ID	Select the ERE event for which you want to run the process.

Employee Type Selection

Select the types of ERE for which you are running the process.

Field or Control	***Description***
Permanent	Select to update the job and payroll data for employees affected by permanent ERE.
Suspension	Select to update the job and payroll data for employees affected by suspension ERE.
Work Sched. Reduction (work schedule reduction)	Select to update the job and payroll data for employees affected by work schedule reduction ERE.

Component Updates

Select the components you want the process to update for employees affected by ERE.

Field or Control	***Description***
Job Data	Select to update the Work Location page.
Contract Data	Select to update the Contract Status/Content page.
Absence Event ESP	Select to update the Absence Event Entry page.
Manage Terminations ESP	Select to update the Manage Terminations ESP page.
Calculate BRD	Select to update the following fields on the Permanent ERE Employee Data, Suspension ERE Employee Data, and Work Reduction Employee Data pages: • Common Contingency Base • Contribution Days • Daily Contributing Base

Generating ERE Reports

These topics provide an overview of ERE reports and discuss how to generate ERE reports.

Pages Used to Generate ERE Reports

Page Name	***Definition Name***	***Usage***
Autonomous Community ESP Page	AUTON_REG_S_ESP	View autonomous communities.
ERE Data Report ESP Page	ERE_RC_DTA1_ESP	Generate an ERE request.
Process ERE Activity Data ESP Page	ERE_RC_XML2	Load activity periods data.
ERE Activity Periods ESP Page	ACTIVT_PERIOD_ESP	Modify activity periods data.
ERE SPEE Communications ESP Page	ERE_RC_XML	Generate ERE XML files.

Understanding ERE Reports

Oracle enables you to generate following ERE-specific reports:

- Free format ERE request.
- Benefit registration XML report
- Activity periods XML report.
- ERE procedure report

Free Format ERE Request

You generate this report for both permanent and temporary ERE to generate an official request for the ERE event that you defined.

Benefit Registration XML Report

You generate this report for employees affected by both permanent and temporary ERE to register them with the SPEE as eligible to receive unemployment benefits.

Activity Periods XML Report

You generate this report on a monthly basis to communicate to the SPEE the activity periods for employees affected by temporary ERE. SPEE uses this information to determine the employees' monthly unemployment benefit. Generating this report is a three-step process:

1. Load activity periods data for a given month and year using the Process ERE Activity Data (ERE_SCHD_ESP) process.

2. Make any necessary modifications to the loaded activity periods data using the ERE Activity Periods ESP page.

3. Generate the Activity Periods Report using the ERE SPEE Communications ESP page.

ERE Procedure Report

You generate this report to initiate an ERE by communicating it to the SPEE.

Autonomous Community ESP Page

Use the Autonomous Community ESP page (AUTON_REG_S_ESP) to view autonomous communities.

Navigation:

Set Up HCM > **Install** > **Country Specific** > **Autonomous Community ESP**

This example illustrates the fields and controls on the Autonomous Community ESP page. You can find definitions for the fields and controls later on this page.

Some data related to ERE are linked to the autonomous community in which the ERE is requested. It is also possible for one ERE event to impact more than one autonomous community. The Autonomous Community ESP page enables you to view the delivered autonomous communities and the states with which they are associated.

ERE Data Report ESP Page

Use the ERE Data Report page (ERE_RC_DTA1_ESP) to generate an ERE request.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Data Report ESP**

This example illustrates the fields and controls on the ERE Data Report ESP page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
ERE ID	Enter the ID of the ERE event for which you are generating a request.
Company	Enter the ID of the company associated with the ERE request. If you leave this field blank, the system generates the report for all companies affected by the ERE event.
Autonomous Community	Enter the autonomous community associated with the ERE request. If you leave this field blank, the system generates the report for all autonomous communities affected by the ERE event.
As Of Date	Enter the date for which you are generating the ERE request. By default, the system populates this field with the begin date defined for the selected ERE ID.

Process ERE Activity Data ESP Page

Use the Process ERE Activity Data ESP page (ERE_RC_XML2) to load activity periods data.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **Process ERE Activity Data ESP**

This example illustrates the fields and controls on the Process ERE Activity Data ESP page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
ERE ID	Enter the ID of the ERE event for which you want to load activity periods data.
Company	Enter the ID of the company for which you want to load activity periods data.
Social Security Number	Enter the social security number of the employer for which you want to load activity periods data.
Year and Month	Select the year and month for which you want to load activity periods data.

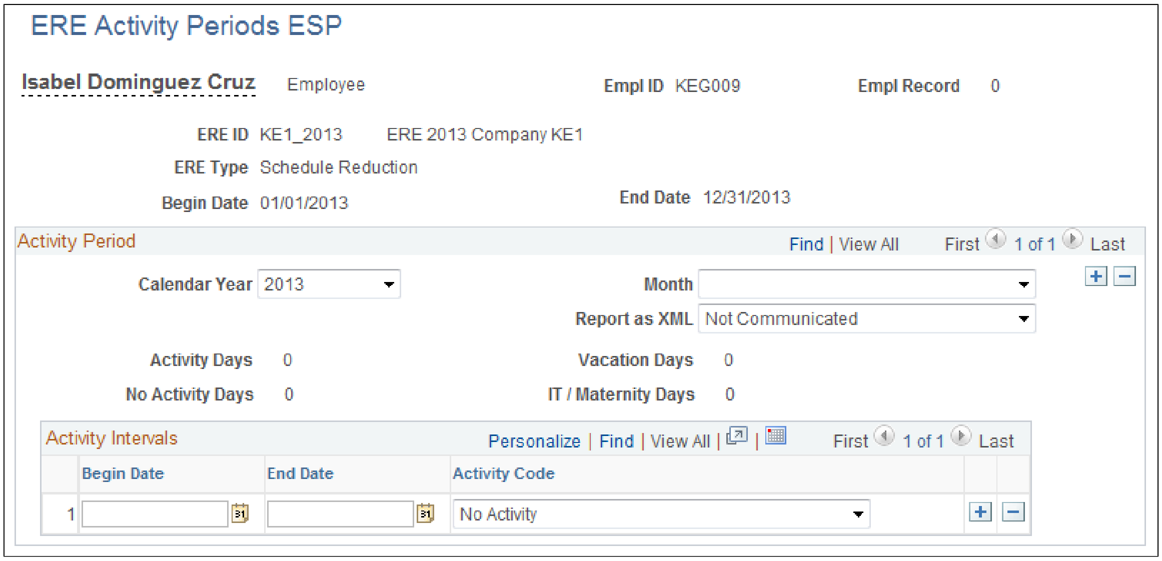
ERE Activity Periods ESP Page

Use the ERE Activity Periods ESP page (ACTIVT_PERIOD_ESP) to modify activity periods data.

Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE Activity Periods ESP**

This example illustrates the fields and controls on the ERE Activity Periods ESP page. You can find definitions for the fields and controls later on this page.



Use this page to make modifications to the activity periods data loaded by the Process ERE Activity Data (ERE_SCHD_ESP) process.

Activity Period

Field or Control	***Description***
Calendar Year and Month	Select the year and month for the activity periods data you want to modify.
Activity Coefficient	Select the coefficient for the activity period.
Report as XML	Indicate whether the activity periods data XML file has been generated and communicated. Valid values are: *Not Communicated, XML Generated,* and *XML Sent/Confirmated.*
Activity Days, Vacation Days, No Activity Days, and IT/ Maternity Days	Display the number of days for each type of activity for the selected month and year.

Activity Intervals

Use this group box to enter activity codes for the periods within the selected month and year.

Field or Control	***Description***
Begin Date and End Date	Enter a date range for a given activity code.

Field or Control	***Description***
Activity Code	Enter the activity code for the period. Valid values are: *Activity, Maternity/IT, No Activity, No Activity due Push Back Call,* and *Vacations/Weekends.*

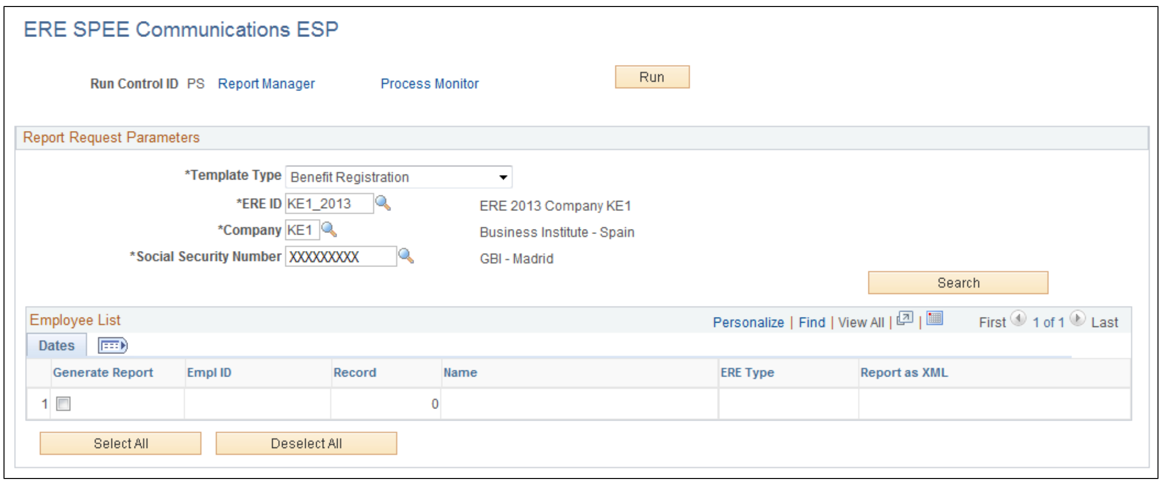
ERE SPEE Communications ESP Page

Use the ERE SPEE Communications ESP page (ERE_RC_XML) to generate ERE XML files.

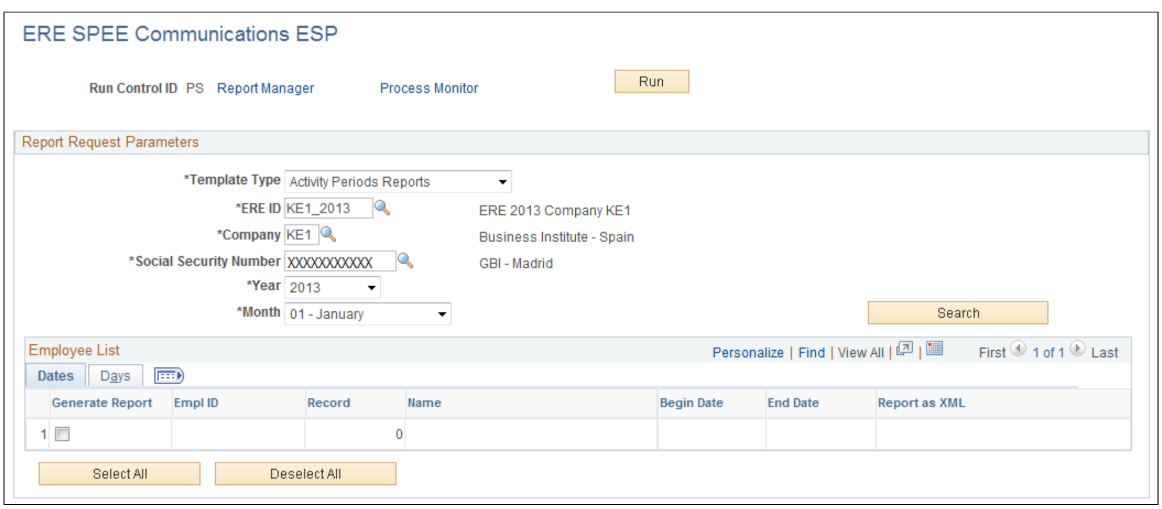
Navigation:

Workforce Administration > **ERE Procedure ESP** > **ERE SPEE Communications ESP**

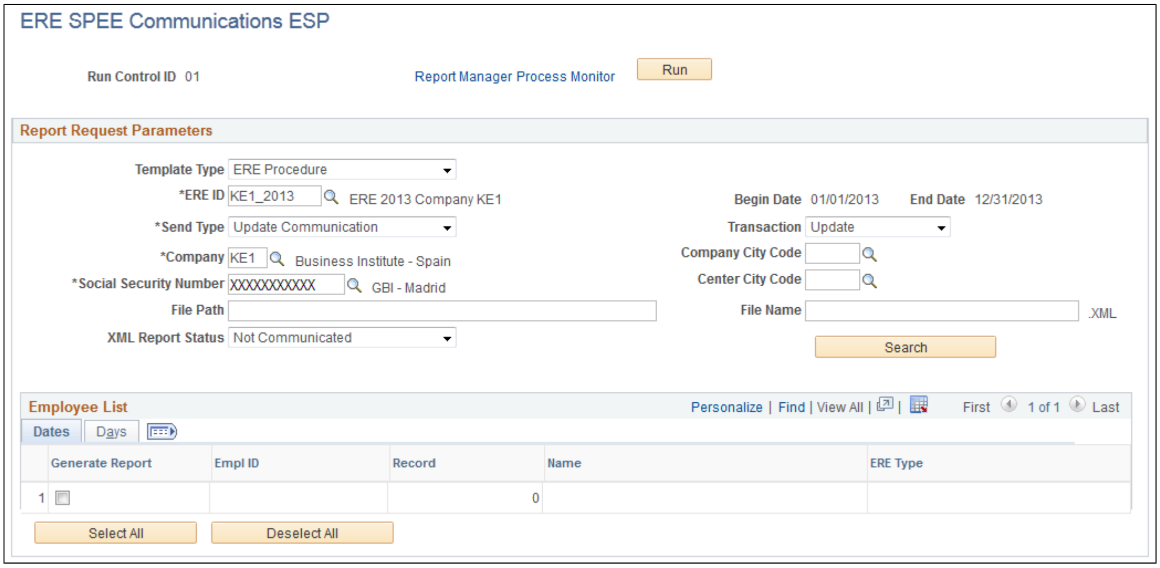
This example illustrates the fields and controls on the ERE SPEE Communications ESP page (Benefit Registration template). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the ERE SPEE Communications ESP page (Activity Periods Reports template). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the ERE SPEE Communications ESP page (ERE Procedure template). You can find definitions for the fields and controls later on this page.



You can use this page to generate three different XML reports:

- Activity Periods Report
- Benefits Registration Report
- ERE Procedure Report

Report Request Parameters

Field or Control	***Description***
Template Type	Select whether you want to generate an XML file for *Benefits Registration* or *Activity Periods Reports* or *ERE Procedure*. The fields displayed in the **Employee List** group box change depending on your selection.
ERE ID	Enter the ID of the ERE event for which you are generating the XML file.
Send Type	Select if you are sending a new communication or updating an already sent communication. The values available are: • *New Communication* • *Update Communication* **Note:** This field appears only in case of ERE Procedure reports.

Field or Control	***Description***
Transaction	If you want to update an already sent communication, select if you would like to update or delete the XML file. The field appears when you select *Update Communication* in the **Send Type** field. **Note:** This field appears only in case of ERE Procedure reports.
Company and **Company City Code**	Enter the ID and city code of the company for which you are generating an XML file. **Note:** The **Company City Code** field is available only for ERE Procedure reports.
Year and Month	Enter the year and month for which you are generating an XML file. These fields appear only if you select *Activity Periods Reports* on in the **Template Type** field.
Social Security Number	Enter the social security number of the employer for which you are generating an XML file.
Center City Code	Select the city code for the work center. **Note:** This field appears only in case of ERE Procedure reports.
File Path and **File Name**	You can enter the directory to which the XML file is to be saved in the **File Path** field and the name of the file to be sent to SPEE in the **File Name field**. **Note:** The file name extension must be *.XML*.
XML Report Status	Select the status of the XML report. The values available are: • *Not Communicated* • *XML Generated*
Search	Click the button to populate the **Employee List** group box with employees that meet the criteria you specify in the **Report Request Parameters** group box.

Employee List

When you click the **Search** button, this group box displays the employees that meet your search criteria. The fields that appear in this group box depend on which value you select in the **Template Type** field. Select the **Generate Report** check box next to the employees for which you want to generate an XML file.

Completing the ERE Procedure

After you have defined and processed your ERE data and generated the required reports, there are some additional steps you must take to complete the ERE procedure.

Permanent ERE

To complete the ERE procedure for employees affected by permanent ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the termination date defined for the ERE event. Use *Termination* as the value for the **Social Security Action** field and *Non Voluntary Termination* as the value for the **Social Security Reason** field.

   On the AFI Data Details page, enter a **Vacation Not Taken End Date**. This date varies for each employee based on the number of pending vacation days that the employee has at the time of termination.

2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the terminated employees.

3. Using the Calculate Absence and Payroll page, run the payroll process for the terminated employees and confirm that they received the correct amount for the INDMNCN earning on the Earnings and Deductions page.

4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for **Terminated employees** and use the **Not in Absence** search criterion.

5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

Suspension ERE

To complete the ERE procedure for employees affected by suspension ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the begin date defined for the ERE event. Use *Like-Active Communication* as the value for the **Social Security Action**.

   On the AFI Data Details page, enter a value of *Temporary ERE reduction* in the **Like-Active Status Type** field and enter the appropriate ERE reduction percentage. Enter period begin and end dates equal to the begin and end dates of the ERE event.

2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the employees affected by suspension ERE.

3. Using the Calculate Absence and Payroll page, run the payroll process for the suspended. On the Earnings and Deductions page, confirm that they received the correct amounts for their regular compensation based on their worked time. In addition, confirm that they received the correct amounts for the unemployment benefit (BNF DESEMPL E) and company complementary benefit (PRST CMP ERE) earnings based on their non-worked time.

4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for **Active employees** and use the **ERE** search criterion.

5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

Work Schedule Reduction ERE

To complete the ERE procedure for employees affected by work schedule reduction ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the begin date defined for the ERE event. Use *Like-Active Communication* as the value for the **Social Security Action**.

   On the AFI Data Details page, enter a value of *Temporary ERE reduction* in the **Like-Active Status Type** field and enter the appropriate ERE reduction percentage. Enter period begin and end dates equal to the begin and end dates of the ERE event.

2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the employees affected by work schedule reduction ERE.

3. Using the Calculate Absence and Payroll page, run the payroll process for the employees with reduced work schedules. On the Earnings and Deductions page, confirm that they received the correct amounts for their regular compensation based on their worked time. In addition, confirm that they received the correct amounts for the unemployment benefit (BNF DESEMPL E) and company complementary benefit (PRST CMP ERE) earnings based on their non-worked time.

4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for **Active employees** and use the **ERE** search criterion.

5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

Chapter 21

(JPN) Tracking Additional Appointments (Kenmu)

Understanding Additional Appointments

You track additional appointments as additional jobs (employment record numbers) in the Job record. You can track multiple additional appointment rows for each main appointment row of the Job record using the Additional Appointment JPN page. The Define Cost Rate JPN page enables you to track cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments that your transferee may have in the home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report, you can view employees by department, including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

Related Links

(JPN) Understanding Reporting Appointments for Job Data Changes

Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

Term	*Definition*
Internal Companies	Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table.
External Companies	Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table.

Setting Up Codes for Tracking Additional Appointments

To set up the codes for tracking additional appointments, use the Set Up Company/Dept Codes (INTCPX_CPY_JPN), Set Up Supervisor Level Codes (INTCPX_SPV_JPN), Additional Appointment Setup for Existing Business Units (RC_AA_JOBCODE_JPN), and Set Up Additional Appointment (AA_SETUP_JPN) components.

These topics provide overviews of dummy codes and setup steps for additional appointments, list prerequisites, and discuss how to set up codes for tracking additional appointments.

Pages Used to Set Up Codes for Managing Additional Appointments

Page Name	***Definition Name***	***Usage***
Set Up Company/Dept Codes Page	INTCPX_CPY_JPN	Set up company and department codes for intercompany transfers to and additional appointments in external companies.
Set Up Supervisor Level Codes Page	INTCPX_SPV_JPN	Set up supervisor level codes for intercompany transfers to and additional appointments in external companies.
AA Setup for Existing BUs JPN Page (Additional Appointment Setup for Existing Business Units JPN)	RC_AA_JOBCODE_JPN	Run the AA_JOBCODE_JPN Application Engine process to create the dummy *AADUMY* job code for each existing business unit. Run this process only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time.
Additional Appointment Setup Page	AA_SETUP_JPN	Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

Dummy Job Code

The PeopleSoft system provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Because job codes are not tracked as part of additional appointment data, the dummy code is required to save the Job record with additional appointment information. The dummy job code is only used in background processing for saving, and is never visible on any page except the Additional Appointment Setup and Job Code Table pages.

The delivered dummy job code is *AADUMY.* The system automatically creates this job code for each new business unit that you define. If you have already created business units, the system provides an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department, and location codes setup for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. The PeopleSoft system does not deliver these dummy codes.

The dummy codes are only used in background processing for saving and are never visible on any page except the Additional Appointment Setup page.

Warning! The department code can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

Related Links

Setting Up a Dummy Business Unit, Company, Department, and Location

Additional Appointment Setup Page

Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during an upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in subsequent topics.

Business Units Are Not Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select **Additional Appointment Enabled** in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Set up your organization's business units on the Business Unit page.

   The system automatically creates the dummy job code *AADUMY* for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.

4. Assign the dummy codes on the Additional Appointment Setup page.

5. (Optional) Set up additional appointment security.

Business Units Are Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous topic with the exception of step 2:

1. Select **Additional Appointment Enabled** in the Japanese Parameters section of the Installation Table - Country Specific page.

2. Run the AA_JOBCODE_JPN Application Engine process to create the dummy job code *AADUMY* for each business unit in your system.

   You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.

4. Enter the dummy codes on the Additional Appointment Setup page.

5. (Optional) Set up additional appointment security.

Related Links

Setting Up Security for Tracking Additional Appointments
“Setting Up Implementation Defaults” (Application Fundamentals)
“Defining Business Units” (Application Fundamentals)

Prerequisites

If you plan to track additional appointments in external companies, you must set up the following information for the external companies:

- Company and department IDs for external company appointments on the Set Up Company/Dept Codes page.

  See (JPN) Setting Up Intercompany Transfer Company Data.

- Supervisor levels for external company appointments on the Set Up Supervisor Level Codes page.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit

See “Defining Business Units” (Application Fundamentals).

- Company

  See “Entering Company Information” (Application Fundamentals).

- Department

  See “Maintaining Departments” (Application Fundamentals).

- Location

  See “Establishing Locations” (Application Fundamentals).

Additional Setup Instructions

The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that they not be real business unit, company, department, and location codes because of the possible effect on security and reporting.
- You may use a real, existing setID to define the dummy codes.
- The dummy department must be excluded from the department tree.

  Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

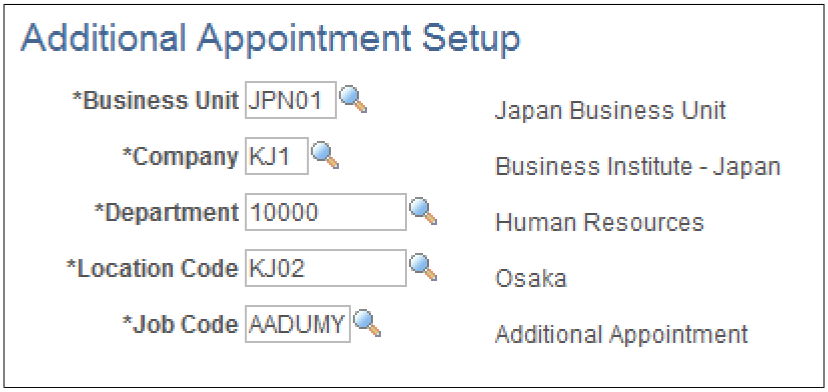
Additional Appointment Setup Page

Use the Additional Appointment Setup page (AA_SETUP_JPN) to enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data JPN** > **Set Up Additional Appointment** > **Additional Appointment Setup**

This example illustrates the fields and controls on the Additional Appointment Setup page. You can find definitions for the fields and controls later on this page.



The prompt values for the **Business Unit, Company, Department,** and **Location Code** fields are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

Field or Control	***Description***
Job Code	*AADUMY* is the default value.

The system uses the values on this page to populate the Job record so that it can be saved.

Setting Up Security for Tracking Additional Appointments

To set up the security for tracking additional appointments, use the Security Install Settings (SCRTY_INSTALL), Security Type Table (SCRTY_TYPE2_TBL), and Addl Appt SQR Security JPN (ADDAPPT_SEC_JPN) components.

These topics provide an overview of security for additional appointments and discuss how to set up security for tracking additional appointments.

Pages Used to Set Up Security for Additional Appointments

Page Name	***Definition Name***	***Usage***
"Security Installation Settings Page" (Application Fundamentals)	SCRTY_INSTALL	Choose the HCM security settings for your installation.
"Security Type Table Page" (Application Fundamentals)	SCRTY_TYPE2_TBL	Use to enable existing security access types or create new ones.
Addl Appt SQR Security JPN Page	AA_SECURITY_JPN	Select the reports that use additional appointment security.

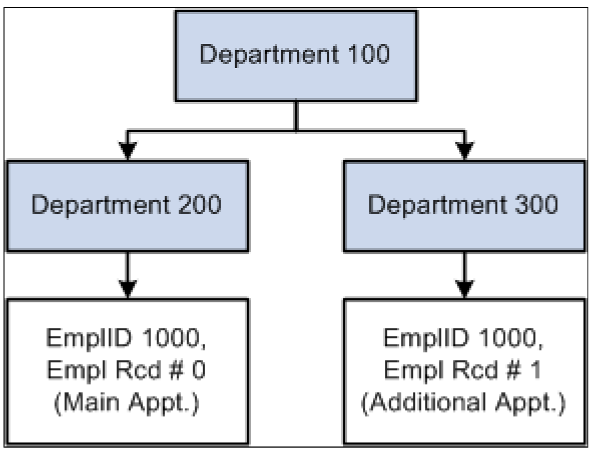
Understanding Security for Additional Appointments

The PeopleSoft system provides two security options for accessing additional appointment data: departmental security and security for additional appointments. If you choose to use the default option, departmental security, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides to access an employee's data. If you set up security for additional appointments, then additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

Example of Security Access

To illustrate how the security options work, consider a department security tree where department 100 is hierarchically above departments 200 and 300. Employee 1000 is in both department: ERN #0, the main appointment, is in department 200, and ERN #1, the additional appointment, is in department 300.

The following diagram illustrates this department structure:



Here is how security works for the two security options:

- If you choose to use the default, departmental security:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - Even if the user has access to department 300, the user does not have any access to the data for employee ID 1000.
- If you choose to set up security for additional appointments:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - If the user has access to department 300 only, then the user can access the data for employee ID 1000 because the employee has an additional appointment in department 300.

Note: Security access is dependent on the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

Setting Up Additional Appointment Security

To set up security for additional appointments:

1. Select *JPN Appointment* on the Security Install Settings page.
2. Select *JPN Additional Appointment* on the Security Type Table page for the PPLJOB security set.
3. Refresh the security join tables using the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

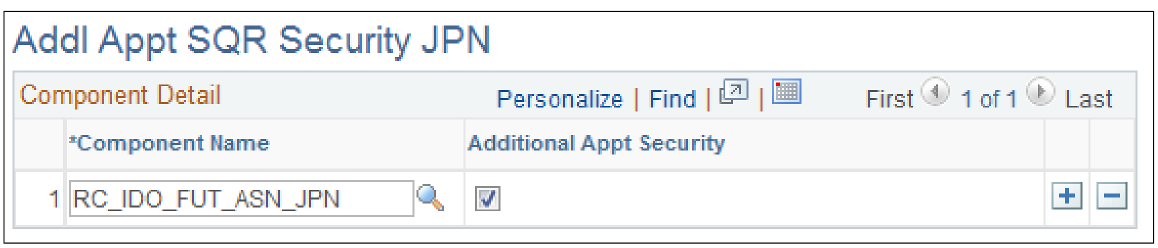
Addl Appt SQR Security JPN Page

Use the Addl Appt SQR Security JPN page (AA_SECURITY_JPN) to select the reports that use additional appointment security.

Navigation:

Set Up HCM > **Security** > **Core Row Level Security** > **Addl Appt SQR Security JPN** > **Addl Appt SQR Security JPN**

This example illustrates the fields and controls on the Addl Appt SQR Security JPN page. You can find definitions for the fields and controls later on this page.



The following table lists the only reports that can be enabled for additional appointment security and the component name to select on the report page:

Report ID	***Report Name***	***Component Name***
PER062JP	Grade Advance Candidate List	RUNCTL_PER062_JPN
PER063JP	Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP	Appointment List JPN	RUNCTL_NTF2_JPN

Report ID	***Report Name***	***Component Name***
PER065JP	Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066JP	Employee Assignment List JPN	EMP_ASN_LST_JPN
PER072JP	Future Employee Assignment List	RC_IDO_FUT_ASN_JPN
PER074JP	Ido Candidate Listing	RC_IDO_EE_LIST_JPN

For other reports, the only way to access information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. PER066JP, PER072JP, and PER074JP display additional appointments.

When additional appointment security is activated for these five reports, the system evaluates only current job information. The system ignores future-dated job rows, such as future-dated hires or terminations. Regardless of the security option selected, the system uses only the current row to determine security access.

Related Links

"Understanding PeopleSoft Security" (Application Fundamentals)

Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments that are associated with the main appointment.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

Field or Control	***Description***
Message subscription	Termination_Add_Appt
Message name	WORKFORCE_SYNC
Channel	PERSON_DATA

Field or Control	***Description***
Tables written to	JOB Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

For more information, see the product documentation for *PeopleTools: Component Interfaces*

Recording and Viewing Employee Additional Appointments Data

These topics discuss how to record and view employee additional appointments.

Note: To access additional appointment data, you must first access the associated main appointment in the search page.

Pages Used to Record and View Employee Additional Appointments Data

Page Name	***Definition Name***	***Usage***
Additional Appointment JPN Page	AA_MGMT_JPN	Add, change, or release additional appointments.
Edit Additional Appointment Information Page	AA_MGMT_JPN_SEC	Record details of additional appointments.
Define Cost Rate JPN Page	AA_MGMT2_JPN	Distribute the cost of a main appointment among its additional appointments.
Job Summary JPN Page	JOB_SUMMARY_JPN	View an employee's job history, including additional appointment total. Access details of additional appointments.
Additional Appointment Data Page	ADD_APPT_SUMM_SEC	View details of additional appointments.

Additional Appointment JPN Page

Use the Additional Appointment JPN page (AA_MGMT_JPN) to add, change, or release additional appointments.

Navigation:

Workforce Administration > Job Information > Additional Appointment JPN > Additional Appointment JPN

This example illustrates the fields and controls on the Additional Appointment JPN page. You can find definitions for the fields and controls later on this page.

Additional Appointments

This section of the page displays information about existing additional appointments.

Field or Control	***Description***
Empl Record (employment record)	The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)
Effective Date	The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.
Status as of	The status of the appointment as of the date in the **Effective Date** field for this employment record number. Values are *Active* and *Inactive.*
Edit	Click this button to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

Field or Control	***Description***
Add	Click this button to add an additional appointment. The system displays the Edit Additional Appointment Information page, where you record the details of the new appointment.

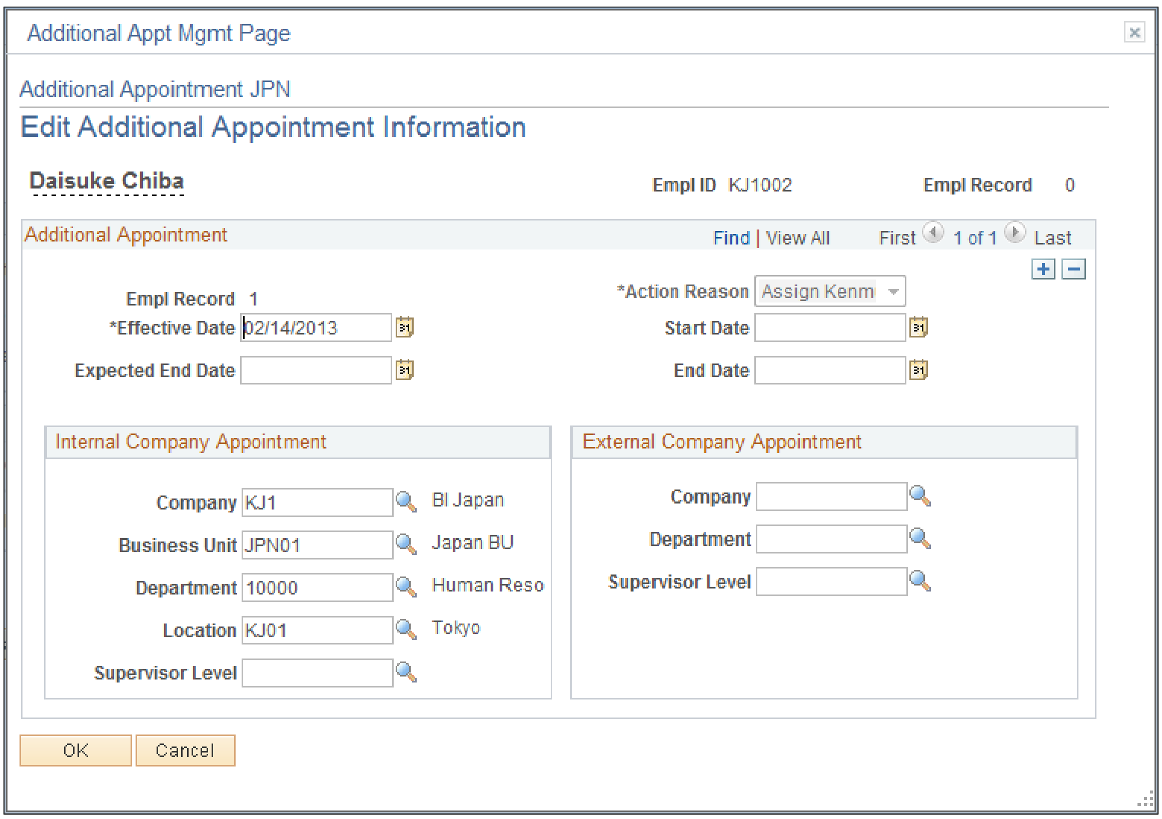
Edit Additional Appointment Information Page

Use the Edit Additional Appointment Information page (AA_MGMT_JPN_SEC) to record details of additional appointments.

Navigation:

Click the **Add** or **Edit** button on the Additional Appointment JPN page.

This example illustrates the fields and controls on the Edit Additional Appointment Information page. You can find definitions for the fields and controls later on this page.



Additional Appointment

Field or Control	***Description***
Empl Record (employment record)	The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)
Action Reason	Three action reason codes are valid for additional appointments: *Asn Kenmu* (assign kenmu): If you click the **Add** button on the Additional Appointment JPN page to access this page, the system enters *Asn Kenmu* and you cannot change it. If you click the **Edit** button to access the page, you cannot save the page if you select *Asn Kenmu.* *Data Chg* (data change): Select this value if you are changing (but not releasing) an additional appointment. *Rel Kenmu* (release kenmu): Select this value if you are releasing the kenmu assignment. **Note:** The codes that you enter on this page are translated into action and reason codes on the Job record as follows: *Asn Kenmu:* The Job record action is *ADL* (additional job) and the reason is *AKM* (assign kenmu). *Data Chg:* The Job record action is *DTA* (data change) and no action reason is associated with it. *Rel Kenmu:* The Job record action is *TER* (termination) and the reason is *RKM* (release kenmu). These Job record rows are not visible to users.
Start Date	Enter the date on which this additional appointment starts.
Expected End Date	Enter the date on which the additional appointment is expected to end.

Field or Control	***Description***
End Date	Enter the date on which the additional appointment actually ends. **Note:** The system displays a warning if the **End Date** value is later than the **Effective Date** value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release.

Note: You can enter information in either the **Internal Company Appointment** group box or the **External Company Appointment** group box. You cannot use both group boxes at the same time.

Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See Internal and External Companies.

External Company Appointment

Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data that you set up on the Set Up Company/ Dept Codes page and the Set Up Supervisor Level Codes page.

Related Links

Prerequisites

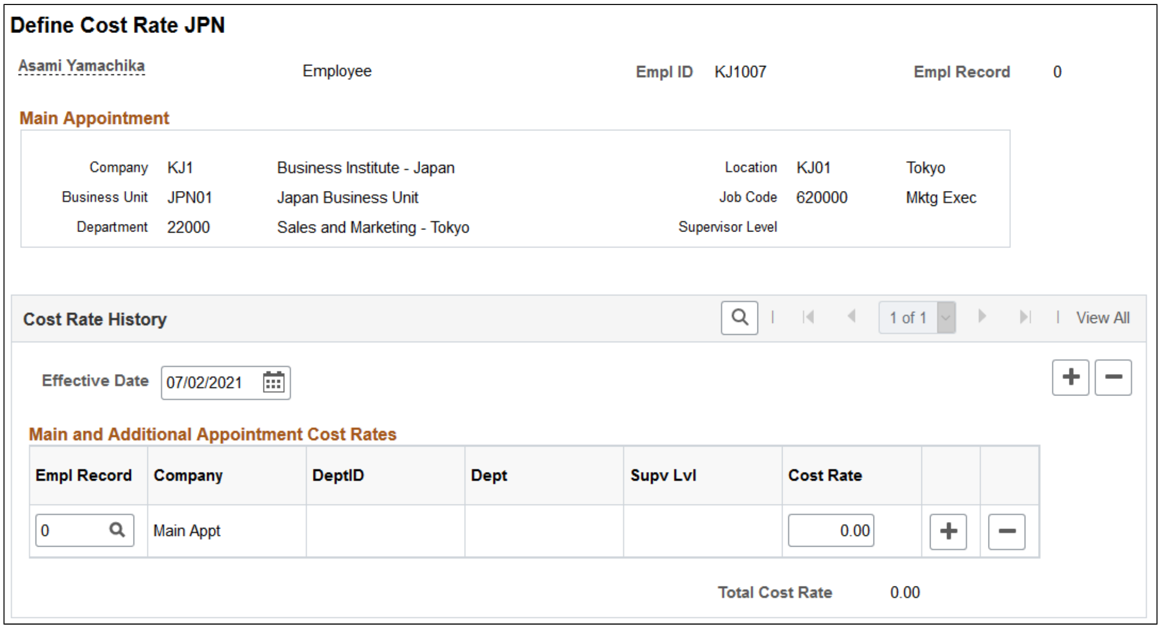
Define Cost Rate JPN Page

Use the Define Cost Rate JPN page (AA_MGMT2_JPN) to distribute the cost of a main appointment among its additional appointments.

Navigation:

Workforce Administration > **Job Information** > **Define Cost Rate JPN** > **Define Cost Rate JPN**

This example illustrates the fields and controls on the Define Cost Rate JPN page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Effective Date	Enter an effective date for when the additional appointment cost rates are being distributed or redistributed.

Main and Additional Appointment Cost Rates

Field or Control	*Description*
Empl Record (employment record)	Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page. When you save the page, the system validates that the employment record is active as of the selected effective date.
Cost Rate	Enter the percentage cost associated with the main appointment and each additional appointment.
Total Cost Rate	When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

Chapter 22

(JPN) Tracking Intercompany Transfers (Shukkou)

Understanding Intercompany Transfer Tracking

Whenever you need to track intercompany transfers (shukkou), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers. You can use the **Pay Group** field on the Job Data - Payroll page to indicate which company is the compensation owner.

This topic discusses home and host data for intercompany transfers and lists prerequisites.

Home and Host Data for Intercompany Transfers

The tables in the two topics that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first table addresses only the hosting of intercompany transfers; the second table addresses both temporary and permanent intercompany transfers.

A later topic provides details of data entry for a series of scenarios.

See Entering and Maintaining Home and Host Data for Intercompany Transfers.

This table explains the abbreviations that are used in the two subsequent tables:

Code	***Description***	***Action***
ICT	Intercompany Transfer	Shukkou
TICT	Temporary Intercompany Transfer	Zaiseki-Shukkou
PICT	Permanent Intercompany Transfer	Tenseki-Shukkou
HICT	Hosting Intercompany Transfer	Shukkou-Ukeire
HTICT	Hosting Temporary Intercompany Transfer	Zaisekki-Shukkou no Ukeire
HPICT	Hosting Permanent Intercompany Transfer	Tenseki-Shukkou no Ukeire
SL	Supervisor Level	Yakushoku

Code	***Description***	***Action***
AA	Additional Appointment	Kenmu
PA	Primary Appointment	Shumu

Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft HCM and from other companies that don't use PeopleSoft HCM:

ICT Type	***PA Location***	***Information and Security Required Within Affiliated Companies that Use PeopleSoft HCM***	***Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft HCM***
1 HTICT	Host (Own Company)	• Host company information, using shared codes. • The owner of payroll. • ICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes. • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	Employee information is maintained at host (own) company only.	Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes.

Temporary and Permanent Intercompany Transfers

This table summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft HCM and to other companies that don't use PeopleSoft HCM:

ICT Type	***PA Location***	***AA at Home Company?***	***Information and Security Required Within Affiliated Companies that Use PeopleSoft HCM***	***Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft HCM***
TICT	Host	No	• Host company information, using shared codes (in case of PS – using group–company). • The owner of payroll. • TICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company/ Department and IC Transfer Supervisor Level codes. • The owner of payroll. • TICT period.
PICT	N/A (Completely terminated from home company)	N/A	Employee information will be maintained at host company only.	N/A

Prerequisites

Before you enter intercompany transfers for an employee, complete these steps:

- Set up a dummy pay group to use as the compensation indicator if you track intercompany transfers in which the host company (that is, not your company) is responsible for paying the employee.

  Note: This setup is reversed if your company is the hosting company; that is, you set up a dummy pay group to track hosted intercompany transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.

Note: You can track intercompany transfers (shukkou) as additional appointments (kenmu) if you set up and use the additional appointment functionality.

Related Links

(JPN) Setting Up Intercompany Transfer Company Data

Understanding Additional Appointments

Indicating the Home or Host Compensation Owner

Setting Up Employee Data for Intercompany Transfers

These topics discuss how to set up employee data for intercompany transfers.

Note: This topic discusses the basics of how to set up an intercompany transfer. See the next topic for detailed examples of data entry and maintenance.

Related Links

Entering and Maintaining Home and Host Data for Intercompany Transfers

Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, set up the employee data:

- Enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers.
- Complete the intercompany transfer fields in the Japan section of the Work Location page.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use on the Administer Workforce pages when you work with intercompany transfers:

Action	***Reason***
Transfer	• Intercompany transfer. • Completion of intercompany transfer.
Termination	• Permanent intercompany transfer. • Completion of (hosted) intercompany transfer.

Action	*Reason*
Hire	• Temporary intercompany transfer. • Permanent intercompany transfer.

Related Links

Work Location Page

Indicating the Home or Host Compensation Owner

You can use the **Pay Group** field on the Job Data - Payroll page **(Workforce Administration > Job Information > Job Data > Payroll)** to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated dummy pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee, or into a designated dummy pay group if the home company is paying the employee.

Note: When the **Payroll System** field is set to *Other* on the Job Data - Payroll page, the **Pay Group** field is not a required field. You can use the field as described previously whether it is required or not.

Related Links

Payroll Page

Entering and Maintaining Home and Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft HCM Database.
- Set B: Multiple Companies Using a Single PeopleSoft HCM Database (with security restrictions).
- Set C: Multiple Companies Using a Single PeopleSoft HCM Database (without security restrictions).

Single Company Using a Single PeopleSoft HCM Database: Scenarios A1-8

This topic discusses several scenarios for a single company that uses a single human resources database.

Note: Additional Employment Instance is not used for any scenarios in set A. The scenarios in set A are applicable when multiple companies use a single human resources database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: TICT

Home Company Inputs

Table	***Fields***	***Input***
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Department ID that indicates temporary intercompany transfer.
	Pay Group	If the home company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit code	If the home company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the Host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the department code. If it is an external company, enter the ICT Department code.

Table	***Fields***	***Input***
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT

Home Company Inputs

Table	***Fields***	***Input***
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Employee's home company department.
	Pay Group	Employee's home company pay group.

Host Company Inputs

Not applicable.

Scenario A3: PICT

Home Company Inputs

Table	***Fields***	***Input***
Job	Action	Termination.
	Reason	Permanent intercompany transfer.

Table	***Fields***	***Input***
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Host Company Inputs

Not applicable.

Scenario A4: HTICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	***Fields***	***Input***
JOB	Action	Hire.
	Reason	Temporary intercompany transfer.

Table	***Fields***	***Input***
	Pay Group	If host (own) company is responsible for compensation, enter the pay group in which you want the employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of HTICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	***Fields***	***Input***
JOB	Action	Termination.
	Reason	Completion of TICT.

Scenario A6: HPICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	***Fields***	***Input***
JOB	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Pay group in which you want this employee.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department: code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.

Table	***Fields***	***Input***
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Multiple Companies Using a Single PeopleSoft HCM Database: Scenarios B1-6

This topic discusses several scenarios for multiple companies that use a single human resources database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings make it impossible for either company to access the other's information.

Scenario B1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	***Fields***	***Input***
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*

Table	***Fields***	***Input***
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee will be sent.
	Company code	Host company to which the employee will be sent.
	Department ID code	Host department in which the employee will be.
	Sup Lvl ID code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	***Fields***	***Input***
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	Employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.

Table	***Fields***	***Input***
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	Employee's home business unit.
	Company code	Employee's home company.
	Department ID code	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of TICT

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	***Fields***	***Input***
JOB	Action	Transfer.
	Reason	Completion of temporary intercompany transfer.
	Department ID	Home company department in which the employee will be.

Table	***Fields***	***Input***
	Pay Group	Pay group for home company that is responsible for compensation.
	Job Indicator	Primary.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Table	***Fields***	***Input***
JOB	Action	Termination.
	Reason	Completion of temporary intercompany transfer.
	Job Indicator	Secondary.

Scenario B3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	***Fields***	***Input***
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee is transferring.
	Company code	Host company to which the employee is transferring.
	Department ID code	Employee's host department.

Table	***Fields***	***Input***
	Sup Lvl ID code	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	***Fields***	***Input***
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit code	Business unit from which the employee comes.
	Company code	Home company to which the employee belongs.
	Department ID code	Home department in which the employee was.

Multiple Companies Using a Single HCM Database: Scenarios C1-6

This topic discusses several scenarios for multiple companies that use a single PeopleSoft HCM database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	***Fields***	***Input***
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	***Fields***	***Input***
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of TICT

See Scenario B2: Completion of Temporary Intercompany transfer.

Scenario C3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	***Fields***	***Input***
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	***Fields***	***Input***
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.

Working with Search Page Security

This topic discusses how department security (Search Page Security on PERS_SRCH_COR and EMPLMT_SRCH_COR) works when you use the system's Multiple Jobs functionality.

Note: You can set up this security in many different ways. Your specific business requirements determine how you set up yours. This topic describes one example of how you may set up your security.

This information makes the following assumptions:

- You want to manage two companies in one database: company A and company B, where company B is a subsidiary of company A.
- The entire organization of company A belongs to business unit A (BUA), and the entire organization of company B belongs to business unit B (BUB).
- You have defined two setIDs: SIDA and SIDB for companies A and B, respectively.
- Neither company's workers have meaningful employee IDs; that is, the ID does not identify the company.

  For example, a person with employee ID 1002 may belong to company B, whereas workers with employee IDs 1001 and 1003 belong to company A.
- This security has two users: USR1 and USR2.

  USR1 has the right to access the sales department of company A, and USR2 has the right to access the sales department of company B.

Following these assumptions, the next table represents the job rows for the person with employee ID 1001, who:

- Was originally hired by company A.
- Went on a temporary intercompany transfer to company B (scenario B1).
- Returned to company A (scenario B3).
- Went on permanent intercompany transfer to company B (scenario B6).

Key: In this table, Empl Rec# = Employment Record Number, Co. = Company, ICT = InterCompany Transfer, A/R = Action/Reason, D = Department, and J = Job Indicator.

Event	***Empl Rec#0***	***Empl Rec#1***
1. Hired by company A	A/R − Hired Co. − A D − Sales J − Primary	NA

Event	***Empl Rec#0***	***Empl Rec#1***
2. Temporary ICT to company B	A/R − Transfer/ICT Co. − A D − Human Resources J − Secondary	A/R − Hire/Temporary ICT Co. − B D − Sales J − Primary
3. Returned to company A	A/R −Transfer/Completion of Temporary ICT Co. − A D − Sales J − Primary	A/R −Termination/Completion of Temporary ICT Co. − B D − Sales J − Secondary
4. Permanent ICT to company B 4a. Terminated from company A 4b. Hired (or rehired) by company B	A/R − Termination / Permanent ICT Co. − A A/R − Hired or rehired / Permanent ICT Co. − B D − Sales J − Primary	NA

This example shows how departmental security (search page security) works for users who have security right access to a department. Users can do one of the following:

- Access all employees whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table.
- Access the particular record numbers for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

This table shows which users have access to which data at each of the four events described for employee 1001:

Event	***Personal Data***	***Empl Rec#0 Data***	***Empl Rec#1 Data***
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by company A	USR1	USR1	NA
2. Temporary ICT to company B	USR1 and USR2	USR1	USR2

Event	***Personal Data***	***Empl Rec#0 Data***	***Empl Rec#1 Data***
3. Returned to company A	USR1 and USR2	USR1	USR2
4a. Permanent ICT to company B 4b. Hired or rehired by company B	USR1 and USR2 USR2	USR1 USR2	USR2 USR2

Running the Intercompany Transfer Report

This topic lists the page used to run the JPN Completion of IC Transfer report.

Page Used to Run the Intercompany Transfer Report

Page Name	***Definition Name***	***Usage***
Completion of IC Transfer JPN Page	RUNCTL_PER065_JPN	Run the JPN Completion of IC Transfer report (PER065JP), which lists employees on temporary intercompany transfer. The home company uses this report to confirm employees who are anticipated to return from temporary intercompany transfer.

Chapter 23

(JPN) Mass Organization Change

Understanding Mass Organization Change

Japanese companies change organizational structure periodically. Consequently, employees are transferred to new roles and departments within the revised structure. This change is referred to as mass period transfers (teiki ido). With rapid changes in the business environment, organizational changes and mass transfers play an integral part for businesses in Japan and take place in short cycles.

Job rotation is viewed as an integral part of employee development in Japan. Human resources (HR) departments intentionally transfer some employees to multiple departments over a period of time. This practice is aimed at developing generalists who are knowledgeable about several jobs within the company. It also provides employees more experience and a broader vision of the company. The period of service in a department is often the selection criterion for job rotation. Employees who are identified as transferable are called transfer candidate employees.

Many companies in Japan employ a split HR organizational structure made up of division HR and corporate HR. Corporate HR is an HR department located in the main company headquarters of a large company or group of companies. Division HR departments are HR departments within a business unit or division. The division HR departments report to the corporate HR department (and the general manager of the business unit, subsidiary companies, and so on).

The division HR department formulates and implements activities related to changes in organizational strategy and employee placement at the departmental level. When division HR finishes its work, it reports to corporate HR. Corporate HR then coordinates and adjusts activities and placements among departments based on company strategy.

Tamatsuki Placement

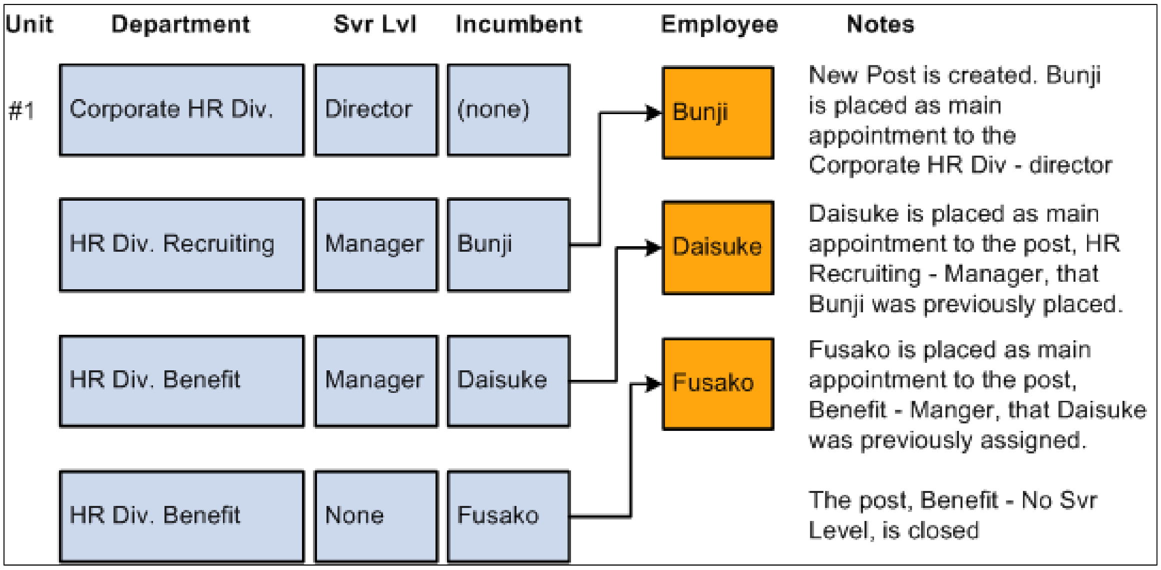
The Japanese word tamatsuki combines the words ball (tama) and hit (tsuku) and means *billiards* in Japanese. Tamatsuki placement begins when an employee is assigned to a newly created post. The existing post is vacated and is available to be filled.

Note: A post is equivalent to a supervisory level role (yakushoku) in a department. It is different from a position, which is maintained in the Position Management feature.

When restructuring an organization, Tamatsuki placement is usually conducted along the same job level. Tamatsuki placement can also occur when an employee has requested a transfer. Job rotation for higher level management positions are also done across the same job level, which starts a job transfer chain of events.

For example, Bunji is assigned a new post, Corporate HR Division Director, and his previous post becomes available. Other employees are then assigned to similar posts at the same level by the cascading effect of a person moving from one post to another and leaving the existing post vacant. Daisuke is assigned to Bunji's previous post, Fusako is assigned to Daisuke's previous post, and Fusako's previous post is closed.

This example of tamatsuki placement is pictured in the following diagram:



Note: This feature does not support transfer between business units as table sets may differ from one business unit to the next.

Changing Plans for Restructuring an Organization

These topics provide an overview of change plans for restructuring an organization and discuss how to change plan for restructuring an organization.

Pages Used to Change Plans for Restructuring an Organization

Page Name	***Definition Name***	***Usage***
Tree Manager Page	PSTREEMGR	Base the new tree on the existing organization structure's tree and copy it or create a tree for the new organization structure. Add departments using Tree Manager functionality. See “Setting Up and Assigning Tree-Based Data Permission” (Application Fundamentals).
Organization Plan Page	IDO_ORG_PLAN_JPN	Set up Ido organization plans.

Page Name	*Definition Name*	*Usage*
Headcount Plan by Department Page	IDO_HC_DEPT_JPN	Specify head count targets by department.
Headcount Plan Listing Page	RC_IDO_HC_RPT_JPN	Use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan.

Understanding Change Plans for Restructuring An Organization

To plan a new organizational structure, you enter information about the new structure in the system. This information includes the department hierarchy and size by supervisor level, job code, and grade. You can store multiple structures under different names. After entering the information for a new plan, you verify the information using a visual chart.

Organizational Structure

You build the existing and planned organizational structures using PeopleSoft Tree Manager. Tree Manager provides a graphical user interface that enables you to create organizational structures visually using drag-and-drop functionality. To create a new organizational structure using Tree Manager, copy the existing tree for the current organizational structure and save it by a different name.

Note: When using an initial tree structure, Oracle recommends that customers create a tree based on the DEPT_SECURITY tree but with a different name. Then, after the tree is approved, rename the tree DEPT_SECURITY with a new effective date.

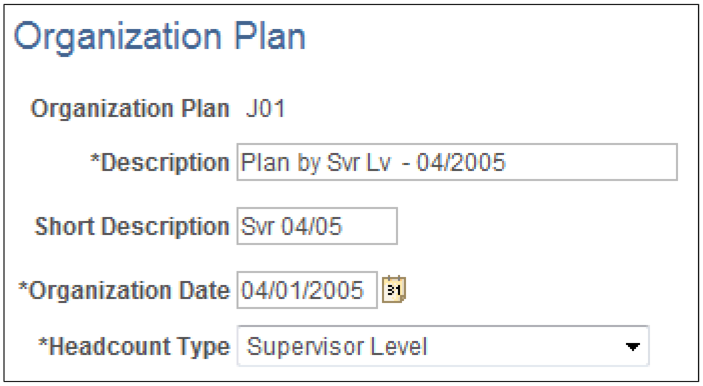
Organization Plan Page

Use the Organization Plan page (IDO_ORG_PLAN_JPN) to set up Ido organization plans.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Organization Plan Checklist** > **Organization Plan**

This example illustrates the fields and controls on the Organization Plan page. You can find definitions for the fields and controls later on this page.



An Organization Plan enables you to track several different ways of reorganizing the company. After running reports modeling the different options, you can select one of the Organization Plans as the *official* plan and insert it into the Job record.

Field or Control	***Description***
Organization Date	Enter the date from which the new organization plan will be effective.
Headcount Type	Select *Job Code, Sal Admin Plan/Grade,* or *Supervisor Level.*

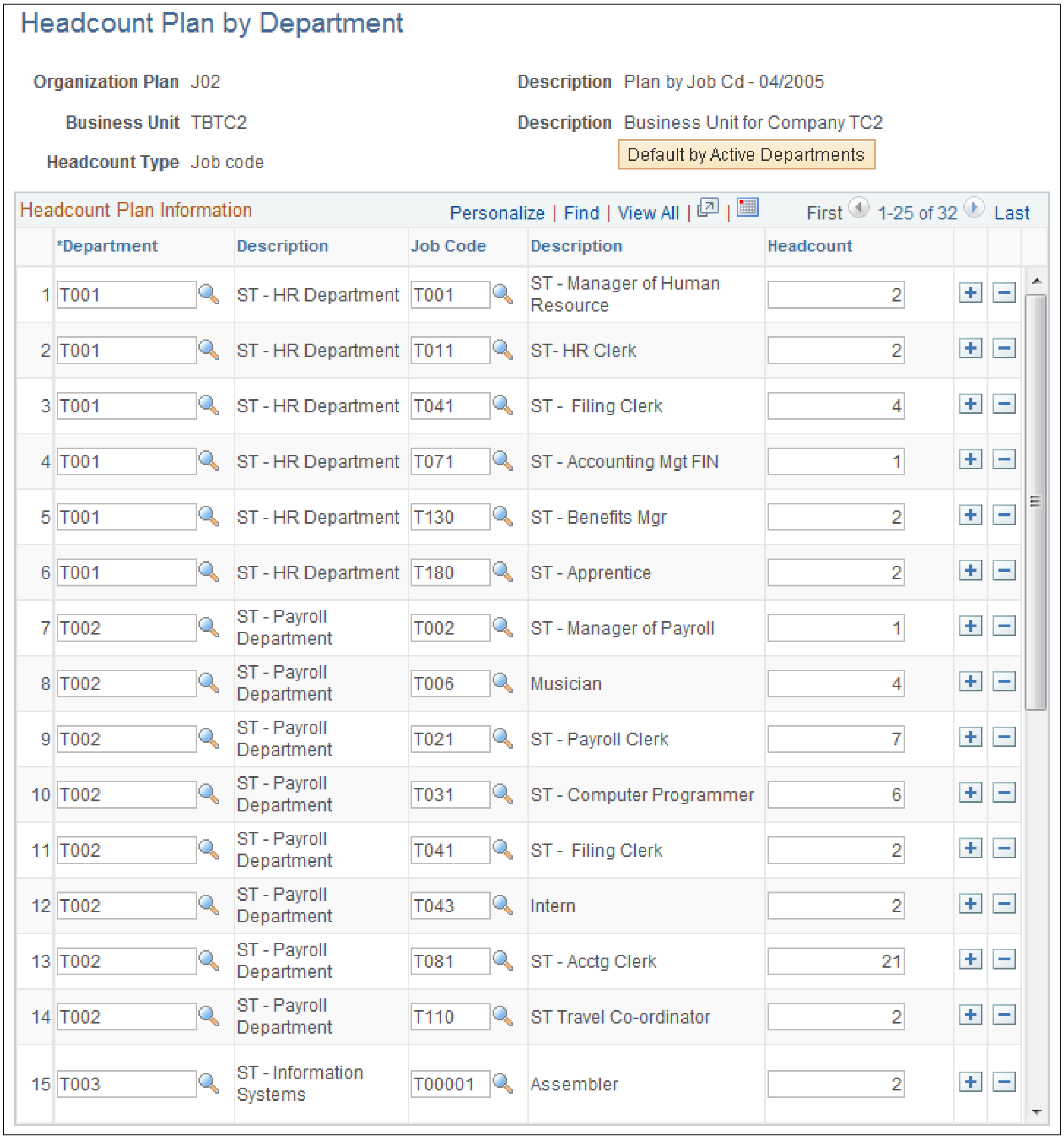
Headcount Plan by Department Page

Use the Headcount Plan by Department page (IDO_HC_DEPT_JPN) to specify head count targets by department.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Headcount Plan by Department** > **Headcount Plan by Department**

This example illustrates the fields and controls on the Headcount Plan by Department page. You can find definitions for the fields and controls later on this page.


Headcount Plan by Department

Organization Plan J02 — Description Plan by Job Cd - 04/2005

Business Unit TBTC2 — Description Business Unit for Company TC2

Headcount Type Job code — Default by Active Departments

Headcount Plan Information — Personalize | Find | View All | First 1-25 of 32 Last

	*Department	Description	Job Code	Description	Headcount
1	T001	ST - HR Department	T001	ST - Manager of Human Resource	2
2	T001	ST - HR Department	T011	ST- HR Clerk	2
3	T001	ST - HR Department	T041	ST - Filing Clerk	4
4	T001	ST - HR Department	T071	ST - Accounting Mgt FIN	1
5	T001	ST - HR Department	T130	ST - Benefits Mgr	2
6	T001	ST - HR Department	T180	ST - Apprentice	2
7	T002	ST - Payroll Department	T002	ST - Manager of Payroll	1
8	T002	ST - Payroll Department	T006	Musician	4
9	T002	ST - Payroll Department	T021	ST - Payroll Clerk	7
10	T002	ST - Payroll Department	T031	ST - Computer Programmer	6
11	T002	ST - Payroll Department	T041	ST - Filing Clerk	2
12	T002	ST - Payroll Department	T043	Intern	2
13	T002	ST - Payroll Department	T081	ST - Acctg Clerk	21
14	T002	ST - Payroll Department	T110	ST Travel Co-ordinator	2
15	T003	ST - Information Systems	T00001	Assembler	2

Use this page to track goals by department. For example, if you have two people in department 100 and you want four people after the reorganization is completed, you enter the number *4* for department 100 on this page. You then perform your transfers. After your reorganization is finished (but before you insert it into the Job record), run the Headcount Plan Listing (PER071JP.SQR) report to see if your transfers have increased the headcount in the department from two to four.

Field or Control	***Description***
Default by Active Departments	Click the **Default by Active Departments** button to populate the **Headcount Plan Information** grid with data about the active departments.

As well as using the **Default by Active Departments** button, you can enter the head count for each department.

Note: This page provides a lower level of detail than the Headcount by Department page. It also breaks down this information by supervisor level, job code, and grade. If you currently had a head count of two in department 100, one with a supervisor level of S10 and one with a supervisor level of S20, you could change the settings to two for S10 and two for S20, resulting in a projected total head count of four for the department.

Note: If you do not want to use headcount planning, then do not enter any data on the Headcount Plan by Department page for that organization plan.

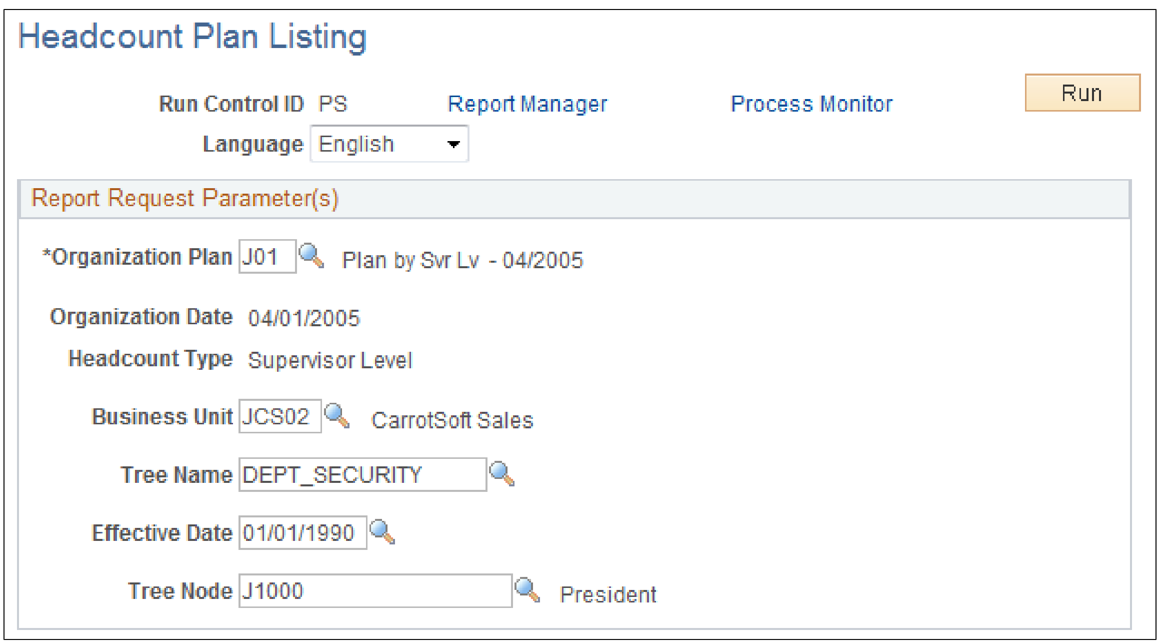
Headcount Plan Listing Page

Use the Headcount Plan Listing page (RC_IDO_HC_RPT_JPN) to use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Headcount Plan Listing** > **Headcount Plan Listing**

This example illustrates the fields and controls on the Headcount Plan Listing page. You can find definitions for the fields and controls later on this page.



Enter values on this page that will be used to compare the head count goals established for departments with the simulated result of the organization plan.

Aligning Employee Placement Plans with the New Organization Structure

These topics provide an overview of employee placement plans and discuss how to align employee placement plans with the new organization.

Pages Used For Employee Placement Plans

Page Name	***Definition Name***	***Usage***
Candidate Listing Page	RC_IDO_EE_LIST_JPN	Run a report that lists current information for employees. Use it to help plan future organizational changes.
Transfer Entry by Department Page	IDO_MASS_TRANS_JPN	Transfer multiple employees from one department to another.
Transfer Entry with Trees Page	IDO_XFR_TREE_JPN	Transfer employees between departments using trees.
Tamatsuki Transfer Candidates Page	IDO_CANDIDATE_JPN	Specify a list of tamatsuki candidates.
Tamatsuki Transfer Entry Page	IDO_TAMATSUKI_JPN	Assign tamatsuki candidates to posts.
Tamatsuki Placement Check List Page	RC_IDO_TAM_CL_JPN	Summarize the tamatsuki transfers that are planned.
Tamatsuki to Transfer Record Page	RC_IDO_TAM_JPN	Copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.
Transfer Data Maintenance Page	IDO_MAINT_JPN	Maintain the Future Update record.

Understanding Employee Placement Plans

Multiple ways exist to create employee placement plans. The first way is to use the Transfer Entry by Department page. With this method, you enter the placement by department. The second method is to use the Transfer Entry with Trees page. You see the current organization structure and placement, and you enter plans.

These methods are similar in that you create an Ido candidate listing, use the Transfer Entry by Department or Transfer Entry with Trees pages, and then use the Transfer Data Maintenance page, if required. You can then check, undo, and adjust placements using the Transfer Data Maintenance page.

The third method is the Tamatsuki Transfer method to enter placements. The Tamatsuki Transfer is an optional step. Using this method, you create an Ido candidate listing, use the Transfer Entry by

Department or Transfer Entry with Trees pages, use the Tamatsuki Transfer Candidate Entry, Tamatsuki Transfer Entry, Tamatsuki Placement Check List, and Tamatsuki to Transfer Record pages, and then you use the Transfer Data Maintenance page, if required.

Security setup does not prevent users from transferring employees. Consequently, limit access to the Mass Employee Transfer page to trusted users only. Security access is invoked whenever a user clicks the **View** links on the Transfer Entry by Department and Transfer Entry by Tree pages.

Candidate Listing Page

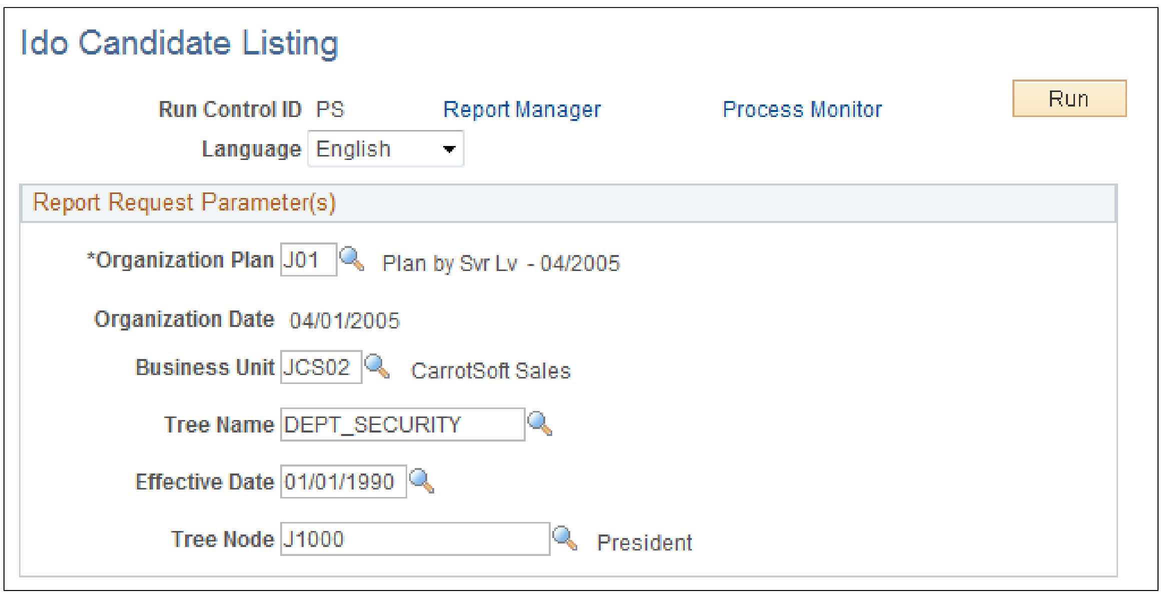
Use the Ido Candidate Listing page (RC_IDO_EE_LIST_JPN) to run a report that lists current information for employees.

Use it to help plan future organizational changes.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Ido Candidate Listing** > **Ido Candidate Listing**

This example illustrates the fields and controls on the Ido Candidate Listing page. You can find definitions for the fields and controls later on this page.



Use this page to run a report to determine which employees are subject to a reorganization or tamatsuki placement. The report is in comma delimited file (CSV) format so that you can open the file as a spreadsheet.

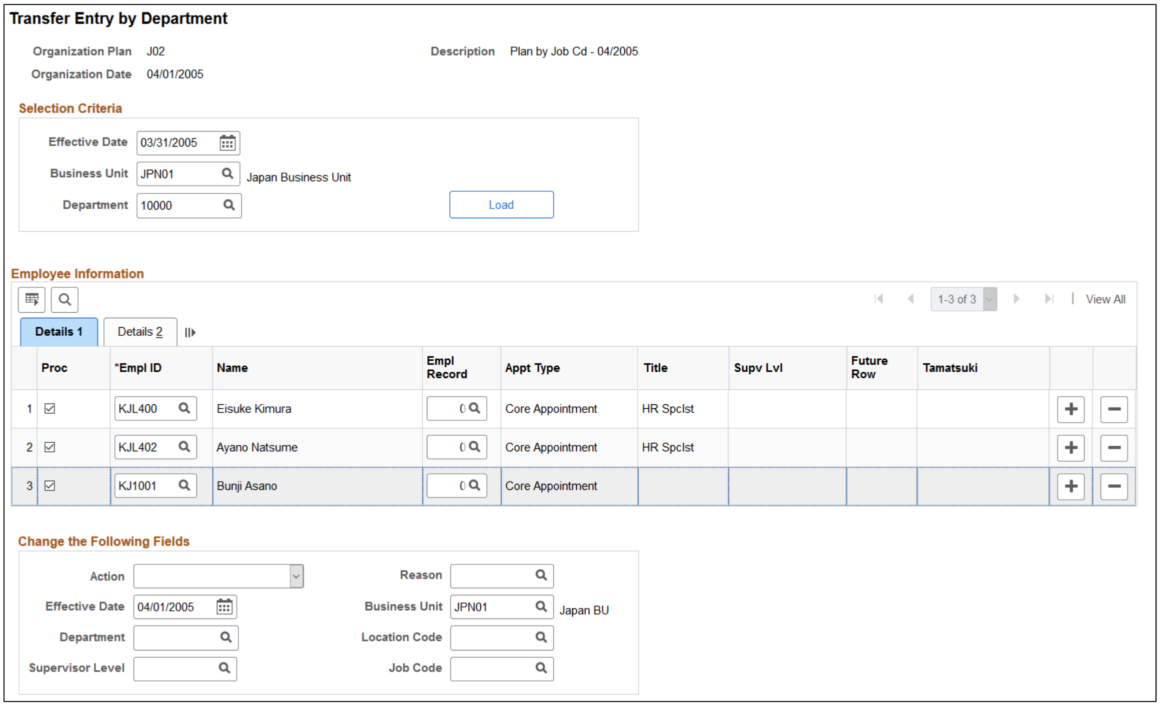
Transfer Entry by Department Page

Use the Transfer Entry by Department page (IDO_MASS_TRANS_JPN) to transfer multiple employees from one department to another.

Navigation:

Workforce Administration > Collective Processes > Mass Organization Change JPN > Transfer Entry by Department > Transfer Entry by Department

This example illustrates the fields and controls on the Transfer Entry by Department page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Load	Click the **Load** button to list the employees for a particular business unit and department who are available for transfer to another department.
Proc (Process)	The **Proc** check box is selected by default. When it is selected, employees are transferred to another department or have other job-related information changed. The changes are applied when the page is saved. For example, department 100 is being closed. Half the employees in that department will be assigned to department 110, and the other half will be assigned to department 120. First, open this page and display all employees in department 100. Then enter a transfer to department 110 in the **Change the Following Fields** group box and deselect the **Proc** check box for those employees who should be transferred to department 120. After saving the page, enter a transfer for department 120, deselect the employees in department 110, reselect the employees to be transferred to department 120, and save the page again.
Action	Select the action to use for inserting a new Job row.
Reason	Select a code to specify why the value is being changed.

Field or Control	***Description***
Effective Date	Enter a date to specify when the change becomes effective.
Business Unit, Department, Location Code, Supervisor Level, and **Job Code**	Enter values in these fields to specify new information for the employees selected. **Note:** These fields should be left blank if a user does not want to change the data for the employees. For example, if you want to move employees from department 100 to 110 but want them to keep their old job codes, you would leave the **Jobcode** field blank on the page. On the other hand, if you want to assign all the employees to job code J200 and change their departments, you would enter *J200* in the **Jobcode** field.

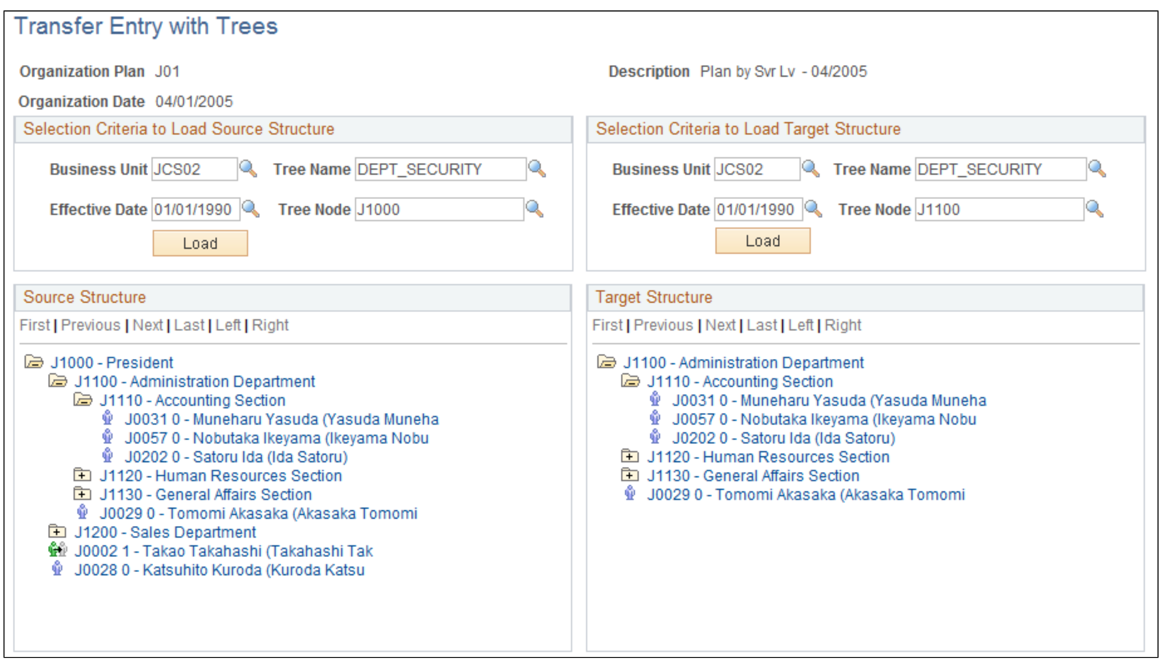
Transfer Entry with Trees Page

Use the Transfer Entry with Trees page (IDO_XFR_TREE_JPN) to transfer employees between departments using trees.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Transfer Entry with Trees** > **Transfer Entry with Trees**

This example illustrates the fields and controls on the Transfer Entry with Trees page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Transfer Entry with Trees page (2 of 2). You can find definitions for the fields and controls later on this page.

Note: Before using this page, consider and decide on each employee's transfer data, including locations, supervisor levels, job codes, and actions and reasons.

Enter values for the **Business Unit, Tree Name, Effective Date,**and **Tree Node** fields in both the **Selection Criteria to Load Source Structure** group box and the **Selection Criteria to Load Target Structure** group box. Click the respective **Load** buttons for each section.

To transfer entries by using trees:

1. Select an employee to be transferred from the Selection Criteria to Load Source Structure tree, and click the Department folder to list all employees in the department.

2. Click the employee's name to display information on the **Details 1** and **Details 2** grids.

3. View information in the **Details 1** and **Details 2** grids, as necessary.

4. Enter values in the **Action** and **Reason** fields.

   The **Location, Supervisor Level,** and **Jobcode** fields are optional.

5. Click a new department for the employee in the Selection Criteria to Load Target Structure tree.

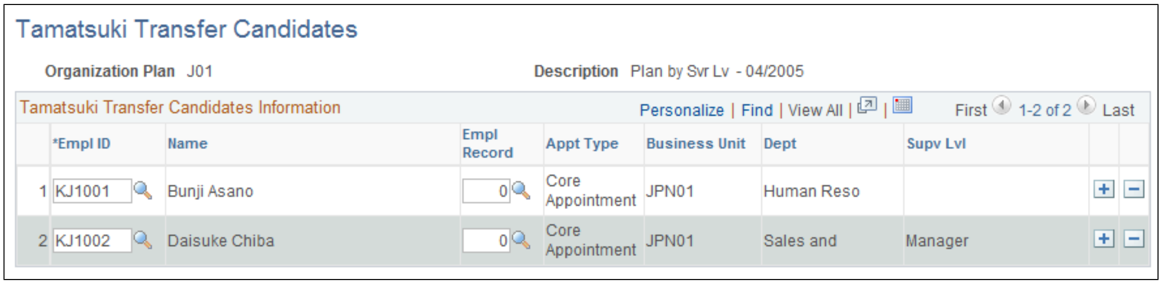
Tamatsuki Transfer Candidates Page

Use the Tamatsuki Transfer Candidates page (IDO_CANDIDATE_JPN) to specify a list of tamatsuki candidates.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Tamatsuki Transfer Candidates** > **Tamatsuki Transfer Candidates**

This example illustrates the fields and controls on the Tamatsuki Transfer Candidates page. You can find definitions for the fields and controls later on this page.



Enter employees who are potentially candidates for transfer using the Tamatsuki transfer method.

Note: Use this page to begin the Tamatsuki process. Select employee IDs that will appear on other pages that are part of the tamatsuki functionality.

Note: Once employees have been assigned as a tamatsuki transfer candidate, they cannot be transferred using the Transfer Entry by Department or Transfer Entry by Tree pages.

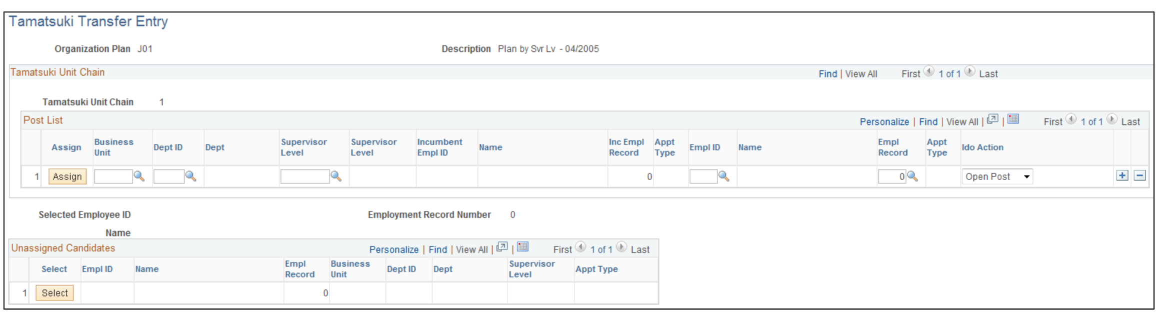
Tamatsuki Transfer Entry Page

Use the Tamatsuki Transfer Entry page (IDO_TAMATSUKI_JPN) to assign tamatsuki candidates to posts.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Tamatsuki Transfer Entry** > **Tamatsuki Transfer Entry**

This example illustrates the fields and controls on the Tamatsuki Transfer Entry page. You can find definitions for the fields and controls later on this page.



Note: When the user needs to change the middle of the Tamatsuki Chain (Unit), the user should delete the whole unit and enter information from the first row.

Post List

Field or Control	*Description*
Assign	Use this button to assign the selected employee to the open post. When no one is selected from the unassigned candidate grid, the selected employee's post is entered on the first row.
Business Unit	This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.
Dept ID	This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.
Supervisor Level	This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.
Ido Action	*Open Post* is the default value when you insert a new row. When an employee is placed in an open post, the system automatically inserts a new row so that another employee can be assigned to the open (vacated) post. Possible values are: • *Assigned* status indicates that the post is filled. • *Close Post* status indicates that a post is terminated. • *Create AA* status is used to assign an employee an additional appointment. Two circumstances can result in an additional appointment. The first is a post that was a main appointment and then changed to an additional appointment. The second is a post that is an additional appointment and remains an additional appointment. **Note:** If the **Additional Appointment Enabled** field on the Installation - Country Specific page is not selected, additional appointment related data does not appear on this page.

Unassigned Candidates

Field or Control	***Description***
Select	In the **Unassigned Candidates** group box, click the **Select** button next to the row of the employee that will be assigned to a post. The **Selected Employee ID** field shows the currently selected employee.

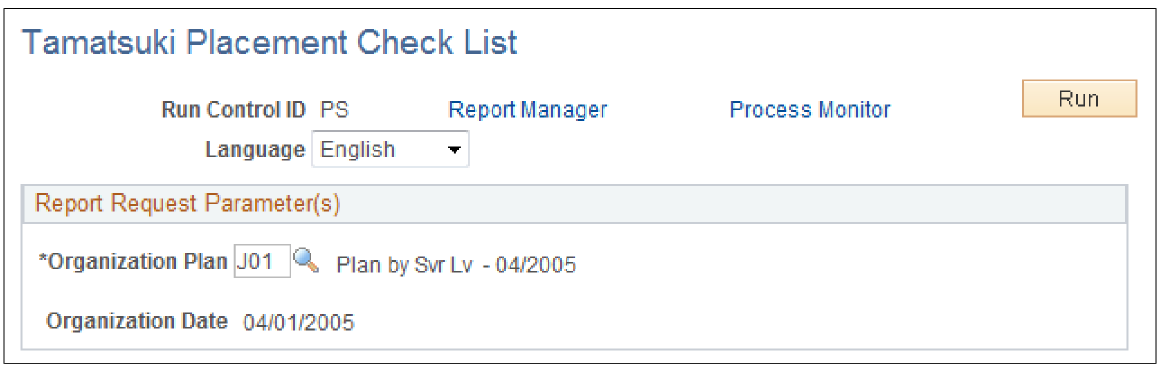
Tamatsuki Placement Check List Page

Use the Tamatsuki Placement Check List page (RC_IDO_TAM_CL_JPN) to summarize the tamatsuki transfers that are planned.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Tamatsuki Placement Check List** > **Tamatsuki Placement Check List**

This example illustrates the fields and controls on the Tamatsuki Placement Check List page. You can find definitions for the fields and controls later on this page.



Use this report to confirm that placements align with the organizational plan and verify that candidates have been placed in the correct posts or that the posts have been assigned the correct candidates.

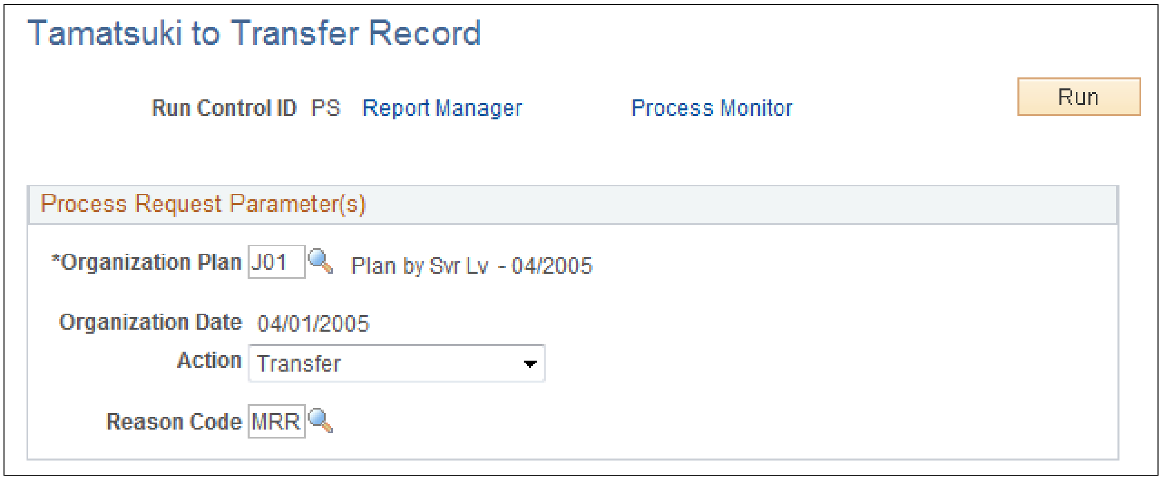
Tamatsuki to Transfer Record Page

Use the Tamatsuki to Transfer Record page (RC_IDO_TAM_JPN) to copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Tamatsuki to Transfer Record** > **Tamatsuki to Transfer Record**

This example illustrates the fields and controls on the Tamatsuki to Transfer Record page. You can find definitions for the fields and controls later on this page.



Tamatsuki data is tracked by the IDO_TAMATSU_JPN record. This process moves the data to the IDO_FUT_UPD_JPN record. The Mass Employee Transfer process takes the data from the IDO_FUT_UPD_JPN record and inserts it into the Job record.

Note: If the Tamatsuki to Transfer Record process is never run, the Mass Employee Transfer process will not insert the tamatsuki post changes into the Job record.

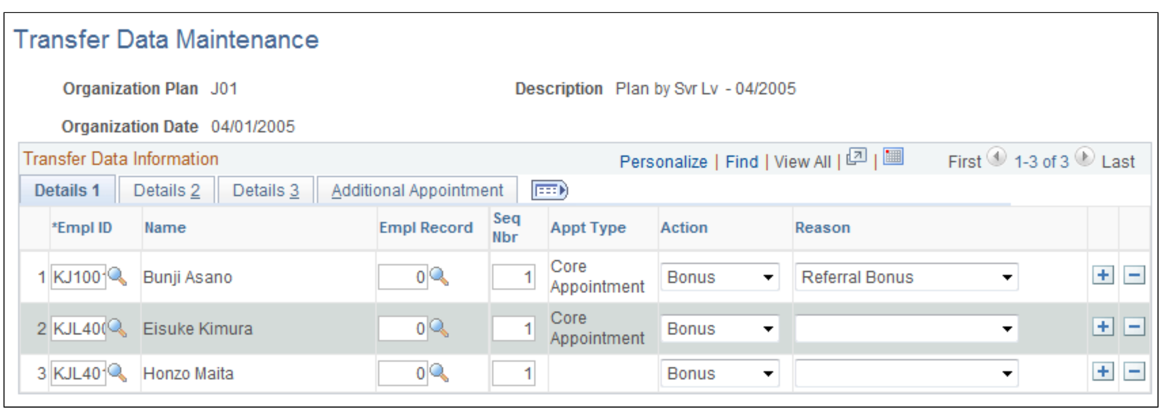
Transfer Data Maintenance Page

Use the Transfer Data Maintenance page (IDO_MAINT_JPN) to maintain the Future Update record.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Transfer Data Maintenance** > **Transfer Data Maintenance**

This example illustrates the fields and controls on the Transfer Data Maintenance page. You can find definitions for the fields and controls later on this page.



Note: Use caution in modifying information on this page because few validations are made here. The primary purpose of the page is to delete unwanted transfers. It is not intended for data entry that you make on other pages in the Tamatsuki process. If you perform actions beyond deleting rows on this page, be careful to validate your entries.

Finalizing Organization and Employee Placement Plans

These topics provide an overview of finalizing organization and employee placement plans and discuss how to finalizing organization and employee placement plans.

Pages Used For Finalizing Organization and Employee Placement Plans

Page Name	*Definition Name*	*Usage*
Organization Plan Checklist Page	RC_IDO_AUD1_JPN	• Run the Employees in Inactive Department report PER069JP) to list employees who will be in inactive departments. • Run the Open Post Checklist report (PER070JP) to list the Open Post Checklist.
Headcount Plan Listing Page	RC_IDO_HC_RPT_JPN	Use this report to list the head count of the new organization structure.
Future Empl Assignment List Page	RC_IDO_FUT_ASN_JPN	Use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed.
Query Viewer Page	QUERY_VIEWER_SRCH	Run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change.
Ido Employee Listing Page	RC_IDO_AUD2_JPN	This report summarizes the changes that will be made if the selected organization plan is processed.
Mass Employee Transfer Page	RC_IDO_MASS_TR_JPN	Run this process to copy data from the Update Transfer Data table and insert it into the Job record.
Temporary Data Cleanup Page	RC_IDO_CLEAN_JPN	Run this process to delete data associated with an organization plan.

Understanding Finalizing Organization and Employee Placement Plans

In order to finalize organization and employee placement plans, a number of checks should be run to ensure that the intended structure is correct and that changes to the organization, employees, and departments are acceptable. HR administrators should also review the Ido Employee Listing and Future Employee Assignment List before the Mass Employee Transfer process.

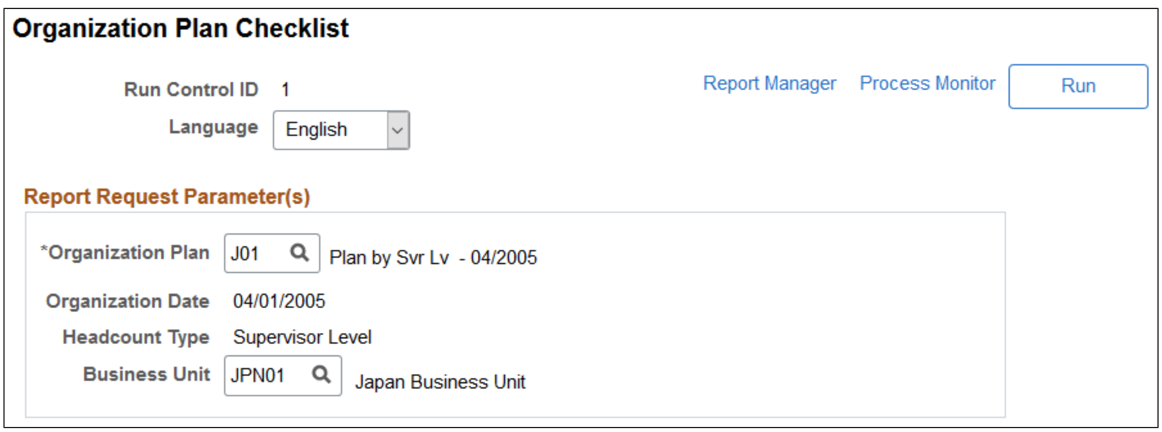
Organization Plan Checklist Page

Use the Organization Plan Checklist page (RC_IDO_AUD1_JPN) to run the Employees in Inactive Department report PER069JP) to list employees who will be in inactive departments and run the Open Post Checklist report (PER070JP) to list the Open Post Checklist.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Organization Plan Checklist** > **Organization Plan Checklist**

This example illustrates the fields and controls on the Organization Plan Checklist page. You can find definitions for the fields and controls later on this page.



Use this page to run the Employees in Inactive Department (PER069JP) report and the Open Post Checklist report (PER070JP).

The purpose of the Open Post Checklist report is to list cases where the actual head count in a department (after simulating the insert into the Job record) does not match the head count goals entered in the Headcount Plan by Department page. The Open Post checklist report only lists head count when the goal and actual numbers do not match.

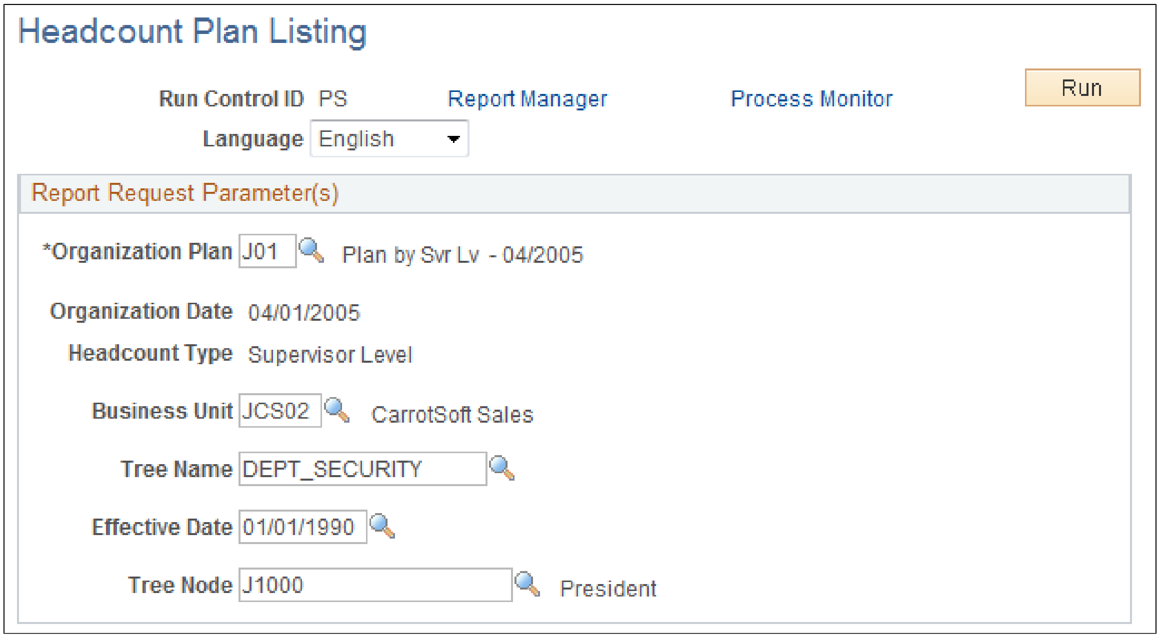
Headcount Plan Listing Page

Use the Headcount Plan Listing page (RC_IDO_HC_RPT_JPN) to use this report to list the head count of the new organization structure.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Headcount Plan Listing** > **Headcount Plan Listing**

This example illustrates the fields and controls on the Headcount Plan Listing page. You can find definitions for the fields and controls later on this page.



Use the Actual Headcount Report to list the actual headcount of an organization plan. This report is the same as the Open Post Checklist report except that it lists both matching and unmatching headcount numbers.

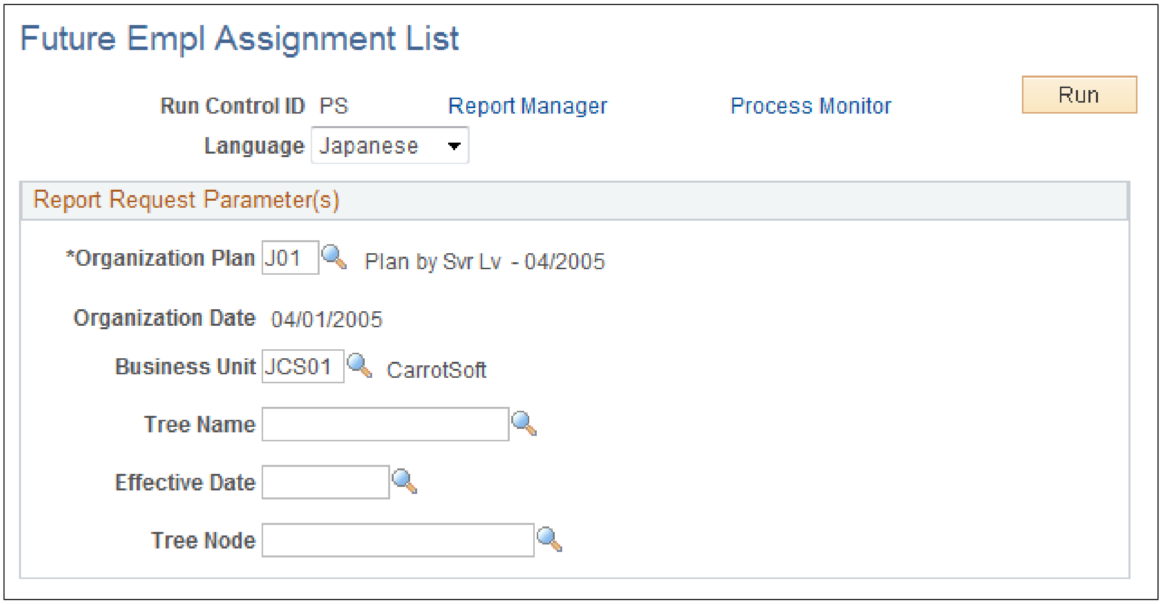
Future Empl Assignment List Page

Use the Future Empl Assignment List page (RC_IDO_FUT_ASN_JPN) to use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Future Empl Assignment List** > **Future Empl Assignment List**

This example illustrates the fields and controls on the Future Empl Assignment List page. You can find definitions for the fields and controls later on this page.



Use this report to simulate the way that the organization would look at an employee level if the organization plan is processed.

Query Viewer Page

Use the Query Viewer page (QUERY_VIEWER_SRCH) to run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change.

Navigation:

Reporting Tools > **Query** > **Query Viewer**

The purpose of this query is to list employees with an effective date greater than the Organization Plan effective date. Employees listed on this report will require manual intervention after the Mass Employee Transfer process has been run.

For example, an employee has the following job data:

Date	***Action***	***DeptID***
January 1, 2003	HIR	100
February 1, 2004	PRO	200

You decide to use the Ido functionality to transfer an employee to department 300 effective on January 1, 2004, before the February 1 date that already exists in the employee's record. Effective February 1, this transfer will be canceled due to the future-dated row. In most cases, you will want to update the February 1, 2004 date to reflect the new department, which is 300. This query enables you to detect when this type of situation occurs and manually update employees records after you process the Ido job insert.

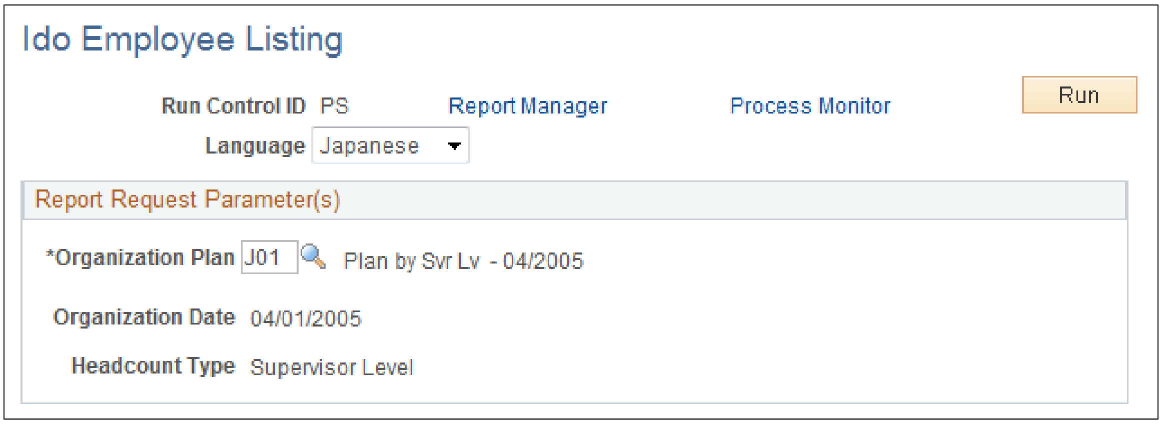
Ido Employee Listing Page

Use the Ido Employee Listing page (RC_IDO_AUD2_JPN) to this report summarizes the changes that will be made if the selected organization plan is processed.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Ido Employee Listing** > **Ido Employee Listing**

This example illustrates the fields and controls on the Ido Employee Listing page. You can find definitions for the fields and controls later on this page.



This report summarizes the changes that will be made if the organization plan is processed. The report is in CSV format so that you can open the file as a spreadsheet.

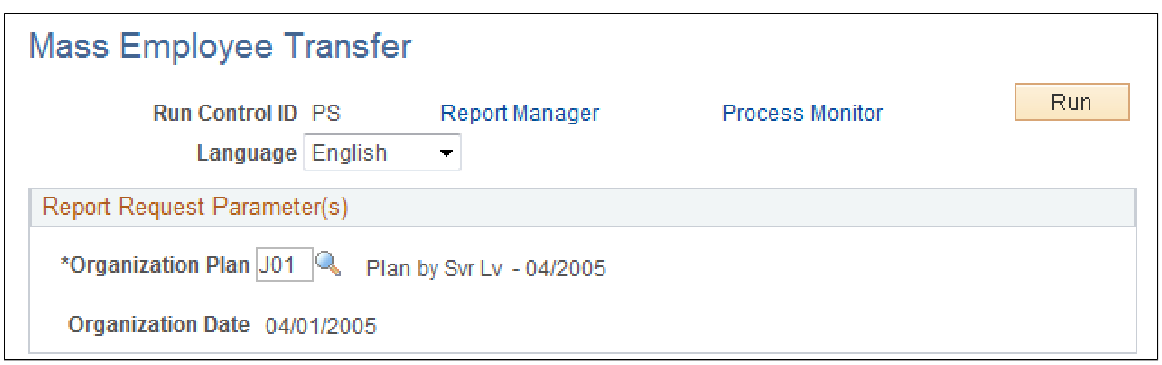
Mass Employee Transfer Page

Use the Mass Employee Transfer page (RC_IDO_MASS_TR_JPN) to run this process to copy data from the Update Transfer Data table and insert it into the Job record.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Mass Employee Transfer** > **Mass Employee Transfer**

This example illustrates the fields and controls on the Mass Employee Transfer page. You can find definitions for the fields and controls later on this page.



After you decide which organization plan to use, run the batch Mass Employee Transfer process. This process updates the database with the new the organization plan. It copies data from the Update Transfer Data table and inserts it into the Job record.

If multiple job rows exist with the same effective date, the same effective date is used, however the effective sequence is incremented. For example, if you want to insert a row into the Job table effective January 1, 2004, but a January 1, 2004 row already exists (with an effective sequence of *0*), the process will insert the new row with an effective sequence of *1*.

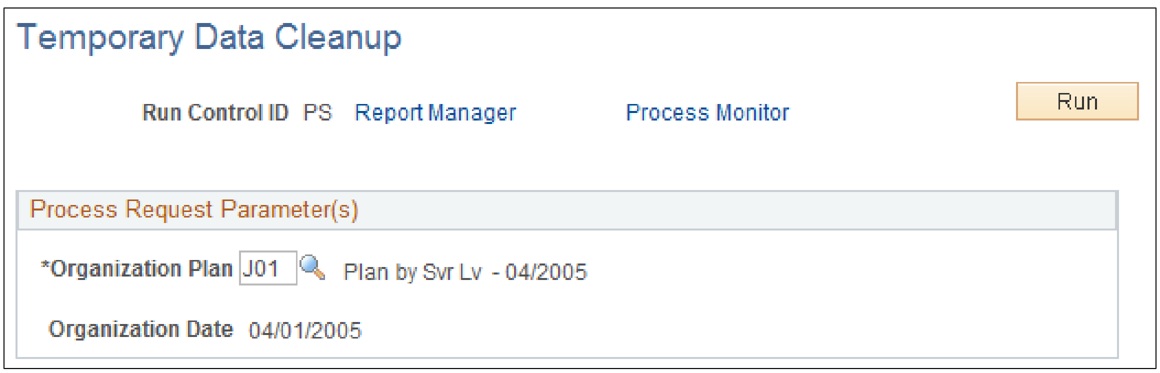
Temporary Data Cleanup Page

Use the Temporary Data Cleanup page (RC_IDO_CLEAN_JPN) to run this process to delete data associated with an organization plan.

Navigation:

Workforce Administration > **Collective Processes** > **Mass Organization Change JPN** > **Temporary Data Cleanup** > **Temporary Data Cleanup**

This example illustrates the fields and controls on the Temporary Data Cleanup page. You can find definitions for the fields and controls later on this page.



Run this process after the Mass Employee Transfer process completes successfully. After the employees are reorganized and their data inserted into the Job record, there is no longer a need to keep the planning information in the database. For the organization plan selected, this process deletes rows from these tables:

- IDO_FUT_UPD_JPN
- IDO_TAMATSU_JPN
- IDO_CANDIDT_JPN
- IDO_HC_DEPT_JPN

Chapter 24

Viewing Summary Workforce Information and Analytics

Viewing Worker Job History

Viewing worker job history provides a quick summary of important job details of current and historic work records.

These topics discuss how to view worker job history.

Pages Used to View Employee Job History

Page Name	***Definition Name***	***Usage***
Workforce Job Summary Page	WF_JOB_SUMMARY	View an employee's job history.
Job Summary JPN Page	JOB_SUMMARY_JPN	View a Japanese employee's job history.
Salary Components Page	COMP_JOB_SUMM_SEC	View compensation information.
Rate Code Page	WCS_RTCD_DETAILS	Review the description, compensation rate type, and rate code class associated with the rate code.

Workforce Job Summary Page

Use the Workforce Job Summary page (WF_JOB_SUMMARY) to view an employee's job history.

Navigation:

Workforce Administration > **Job Information** > **Review Job Information** > **Workforce Job Summary** > **Workforce Job Summary**

This example illustrates the fields and controls on the Workforce Job Summary page: General tab. You can find definitions for the fields and controls later on this page.

The Job Summary page displays the person's name, organizational relationship, and ID.

Common Page Information

Field or Control	***Description***
Effective Date and **Seq** (sequence)	Displays the effective date and effective date sequence, if any, for each personnel action. The sequence tracks actions that occur on the same day.
Org Relation (organizational relationship)	Indicates the type of organizational relationship, *EMP* (employee), *CWR* (contingent worker), or *POI* (person of interest).
Empl Record (employment record)	The sequential number of the employment instance for the same ID.

General Tab

Select the General tab.

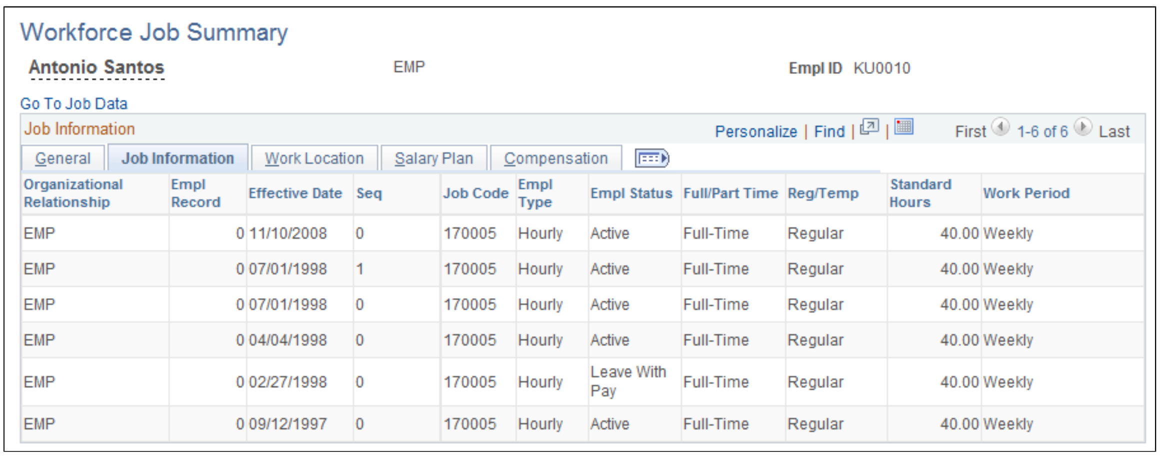
Field or Control	***Description***
Action and**Action Reason**	Displays the action taken and reason for the row's existence.

Field or Control	Description
Job Data	Click this link to display the Job Data component. The system initially displays the current row, regardless of which row's link you click. To access a specific row after you access the Job Data component, use the **Go To Row** button on the Work Location page.

Job Information Tab

Select the Job Information tab.

This example illustrates the fields and controls on the Workforce Job Summary page: Job Information tab. You can find definitions for the fields and controls later on this page.



Organizational Relationship	Empl Record	Effective Date	Seq	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
EMP	0	11/10/2008	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	07/01/1998	1	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	07/01/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	04/04/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	02/27/1998	0	170005	Hourly	Leave With Pay	Full-Time	Regular	40.00	Weekly
EMP	0	09/12/1997	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly

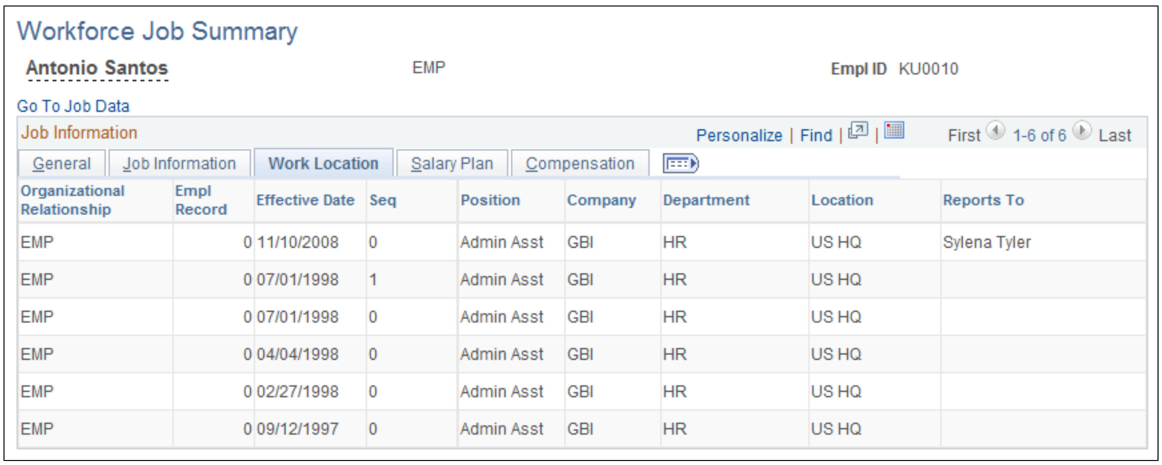
Field or Control	Description
Job Code	Displays the job code information for this worker after each personnel action.
Empl Type (employee type)	Displays the worker type after each personnel action.
Empl Status (employee status)	Displays the worker's status after each personnel action.
Full/Part Time	Indicates whether the worker is full or part time after each personnel action.
Reg/Temp	Indicates whether the worker is regular or temporary after each personnel action.
Standard Hours	Displays the standard hours per work period after each personnel action.

Field or Control	*Description*
Work Period	Displays the work period after each personnel action.

Work Location Tab

Select the Work Location tab.

This example illustrates the fields and controls on the Workforce Job Summary page: Work Location tab. You can find definitions for the fields and controls later on this page.

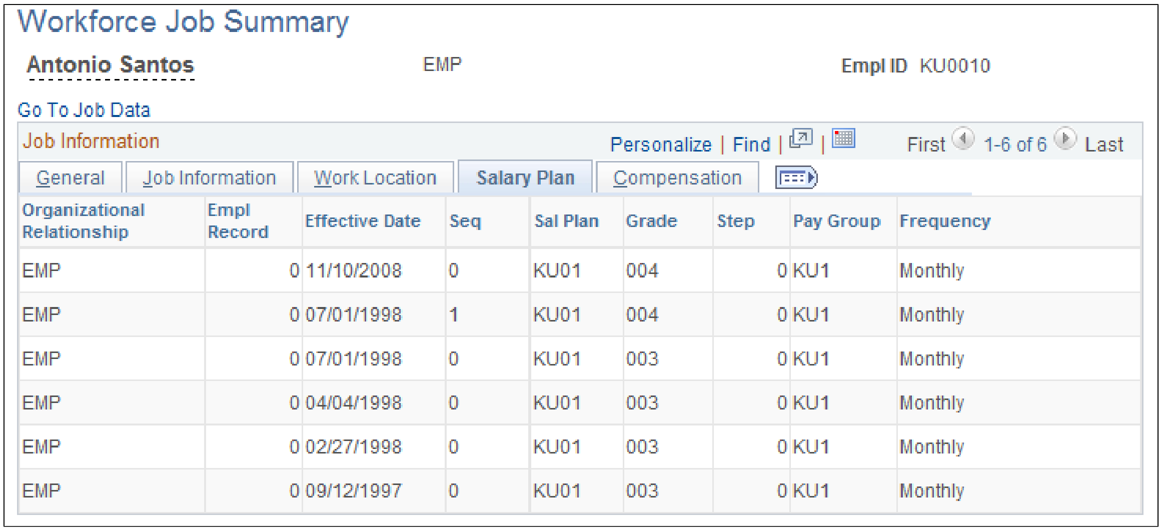


Field or Control	*Description*
Position, Agency, Department, Location, and **Reports To**	The workers position, company code, department, location, and supervisor after each personnel action.

Salary Plan Tab

Select the Salary Plan tab.

This example illustrates the fields and controls on the Workforce Job Summary page: Salary plan tab. You can find definitions for the fields and controls later on this page.


Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

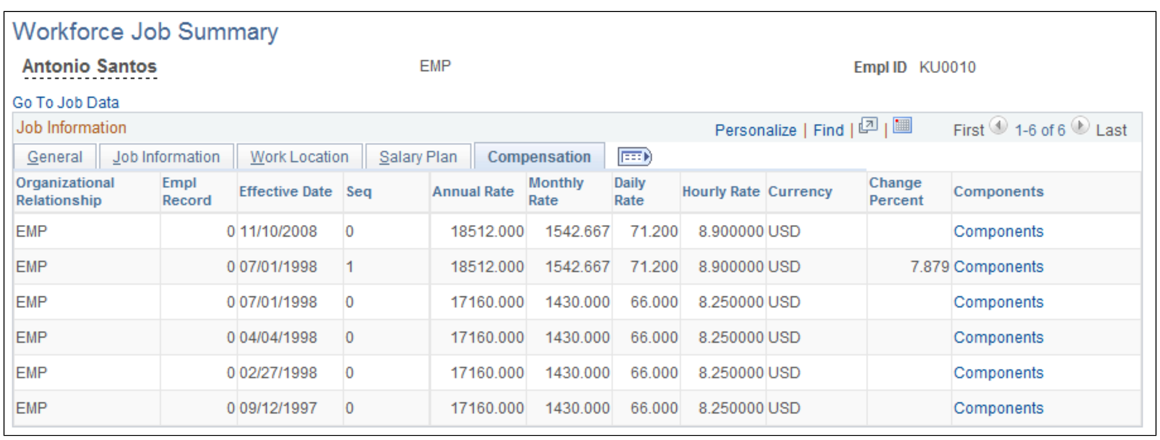
Organizational Relationship	Empl Record	Effective Date	Seq	Sal Plan	Grade	Step	Pay Group	Frequency
EMP	0	11/10/2008	0	KU01	004	0	KU1	Monthly
EMP	0	07/01/1998	1	KU01	004	0	KU1	Monthly
EMP	0	07/01/1998	0	KU01	003	0	KU1	Monthly
EMP	0	04/04/1998	0	KU01	003	0	KU1	Monthly
EMP	0	02/27/1998	0	KU01	003	0	KU1	Monthly
EMP	0	09/12/1997	0	KU01	003	0	KU1	Monthly

Field or Control	***Description***
Sal Plan (salary plan), **Grade, Step, Pay Group,** and **Frequency**	Displays the worker's salary plan, grade, step, pay group, and payment frequency after each personnel action.

Compensation Tab

Select the Compensation tab.

This example illustrates the fields and controls on the Workforce Job Summary page: Compensation tab. You can find definitions for the fields and controls later on this page.


Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

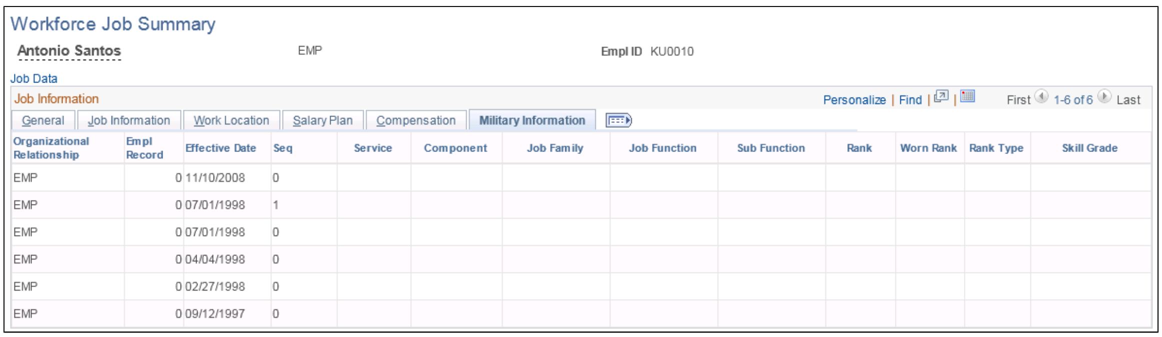
Organizational Relationship	Empl Record	Effective Date	Seq	Annual Rate	Monthly Rate	Daily Rate	Hourly Rate	Currency	Change Percent	Components
EMP	0	11/10/2008	0	18512.000	1542.667	71.200	8.900000	USD		Components
EMP	0	07/01/1998	1	18512.000	1542.667	71.200	8.900000	USD	7.879	Components
EMP	0	07/01/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	04/04/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	02/27/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	09/12/1997	0	17160.000	1430.000	66.000	8.250000	USD		Components

Field or Control	***Description***
Annual Rt (annual rate), **Monthly Rt** (monthly rate), **Daily Rt** (daily rate), **Hrly Rate** (hourly rate), **Currency,** and **Change Percent**	Displays the worker's compensation rate in annual, monthly, daily, or hourly terms in the given currency. When there has been a change in the compensation rate for this employee, the system displays the percentage of change from the previous row.
Components	Click the link to access the Salary Components page.

Military Information Tab

Select the Military Information tab.

This example illustrates the fields and controls on the Workforce Job Summary page: Military Information tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Service	The specific branch of armed forces (for example, Army, Navy, Air Force, Marines, and so forth)
Component	The type of service (for example, Regular, Active Reserve, Inactive Reserve, Emergency Reserve, or Guard).
Job Family	The job classification associated with the job code (for example, Intelligence, Ammunitions, Medical, Aviation).
Job Function	The function associated with the job code (for example, Cryptography, Doctor, Nurse, Pilot).
Sub function	The sub function associated with the job code (for example, Surgeon, Pathology, Radiology, Light-wing pilot).

Field or Control	*Description*
Rank	Rank held permanently, as opposed to while serving in a particular post. When relieved of command, a holder of substantive rank remains at that rank.
Worn Rank	Actual or temporary rank held while serving in a particular post.
Rank Type	The rank category (for example, Substantive, Temporary, Frocked, Acting, Acting Lacking, Honorary, Provisional, Probationary).
Skill Grade	The overall evaluated grade level for the individual after the personnel action.

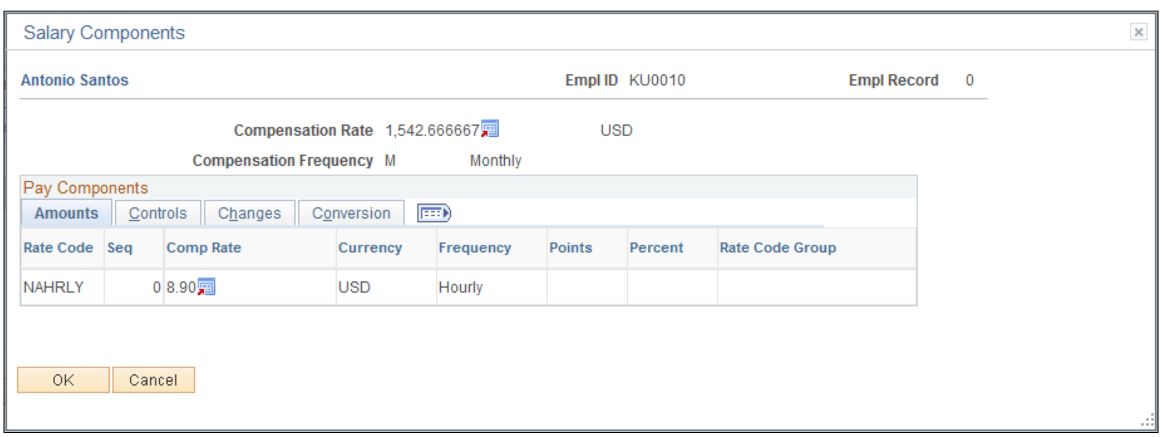
Salary Components Page

Use the Salary Components page (COMP_JOB_SUMM_SEC) to view compensation information.

Navigation:

Click the **Components** link on the Compensation tab of the Workforce Job Summary page.

This example illustrates the fields and controls on the Salary Components page. You can find definitions for the fields and controls later on this page.



Common Page Elements

Field or Control	***Description***
Rate Code	Rate codes are IDs for pay components. The system displays compensation information associated with this rate code in the compensation grid.
Seq (sequence)	Indicates multiple occurrences of the same rate code.

Amounts Tab

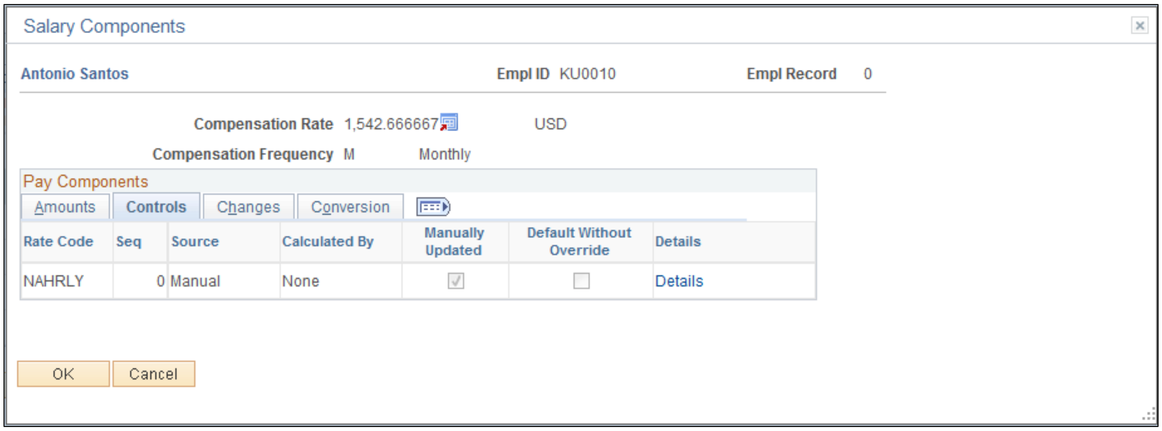
Select the Amounts tab.

Field or Control	***Description***
Comp Rate (compensation rate) and **Currency**	Displays the compensation rate for the pay component rate codes and the currency.
Frequency	Displays the compensation frequency for the pay component's rate.
Points	Displays the salary points associated with this rate code, if there are any.
Percent	If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).
Rate Code Group	A rate code group enables you to be more specific when calculating percentage-based components as part of your worker compensation package.

Controls Tab

Select the Controls tab.

This example illustrates the fields and controls on the Salary Components page: Controls tab. You can find definitions for the fields and controls later on this page.

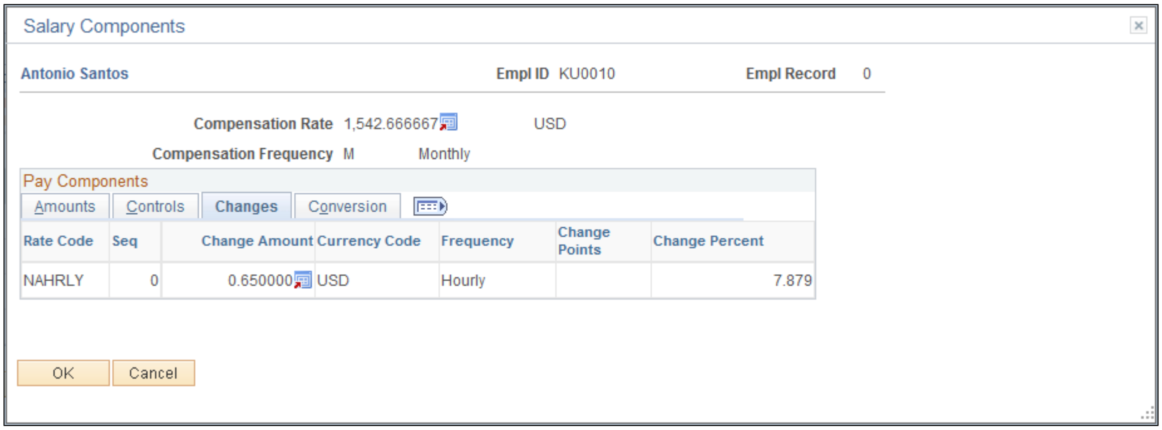


Field or Control	*Description*
Source	Indicates how the pay component was assigned to the Compensation grid. *Manual* indicates that the pay component was added manually; *Salary Step* indicates that the pay component defaulted from the Salary Step; *Job Code* indicates that the pay component defaulted from the job code definition, and so on.
Calculated by	Values are: • *None:* The rate value is assigned by the Rate Code definition or manually entered. • *Rate Matrix:* The rate value is determined by a rate code matrix. • *Extended:* Not used.
Manually Updated	Indicates whether the pay component's value was manually entered or the pay rate contains only defaulted values.
Default Without Override	Indicates whether the default rate value of the pay component can be overridden.
Details	Click to access the Comp Rate Code page and review the description, compensation rate type, and rate code class associated with the rate code.

Changes Tab

Select the Changes tab.

This example illustrates the fields and controls on the Salary Components page: Changes tab. You can find definitions for the fields and controls later on this page.

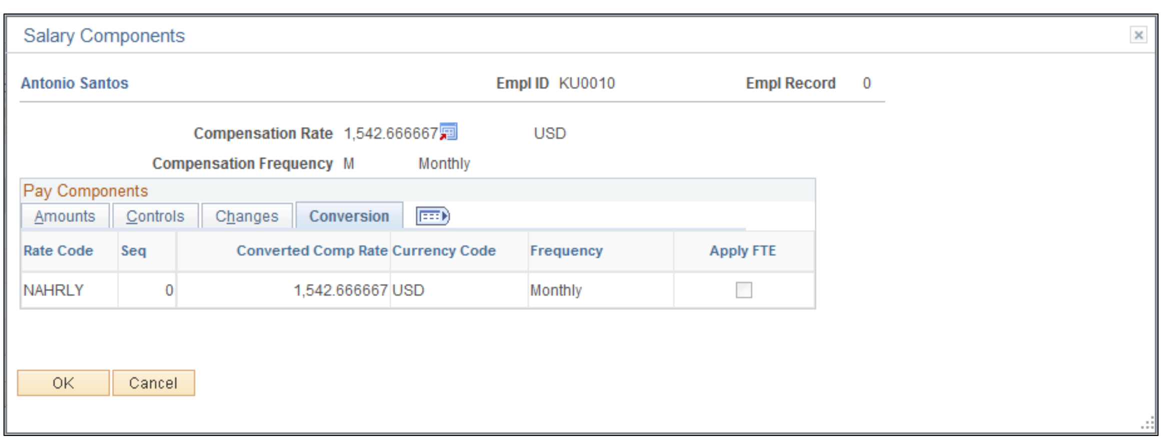


Field or Control	*Description*
Change Amount	Displays the overall change amount in this pay component rate relative to the previous Job Data row.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if **Salary Points** is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Conversion Tab

Select the Conversion tab.

This example illustrates the fields and controls on the Salary Components page: Conversion tab. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency specified.
Apply FTE (apply full time equivalent)	Indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type percent.

(USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

These topics discuss how to view federal employee personal and job data.

Pages Used to View Personal and Job Data

Page Name	*Definition Name*	*Usage*
Personal Data USF - Personal Data Page	GVT_PERS_INQ	View employee personal data.
Mailing Address Page	GVT_MAILADDR_SEC	View the employee's mailing address.
Veterans Info (veterans information) Page	GVT_VETINF_INQ_SEC	View veteran's information for this employee.
Job Data1 Page	GVT_JOB_INQ	View employee job data.
Benefits/Retirement Data Page	GVT_BENDAT_INQ_SEC	View the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.
Job Data2 Page	GVT_JOB_INQ2	View additional job data, including quoted pay and expected pay information.
Employment Data Page	GVT_EMPLOY_INQ	View employment data.

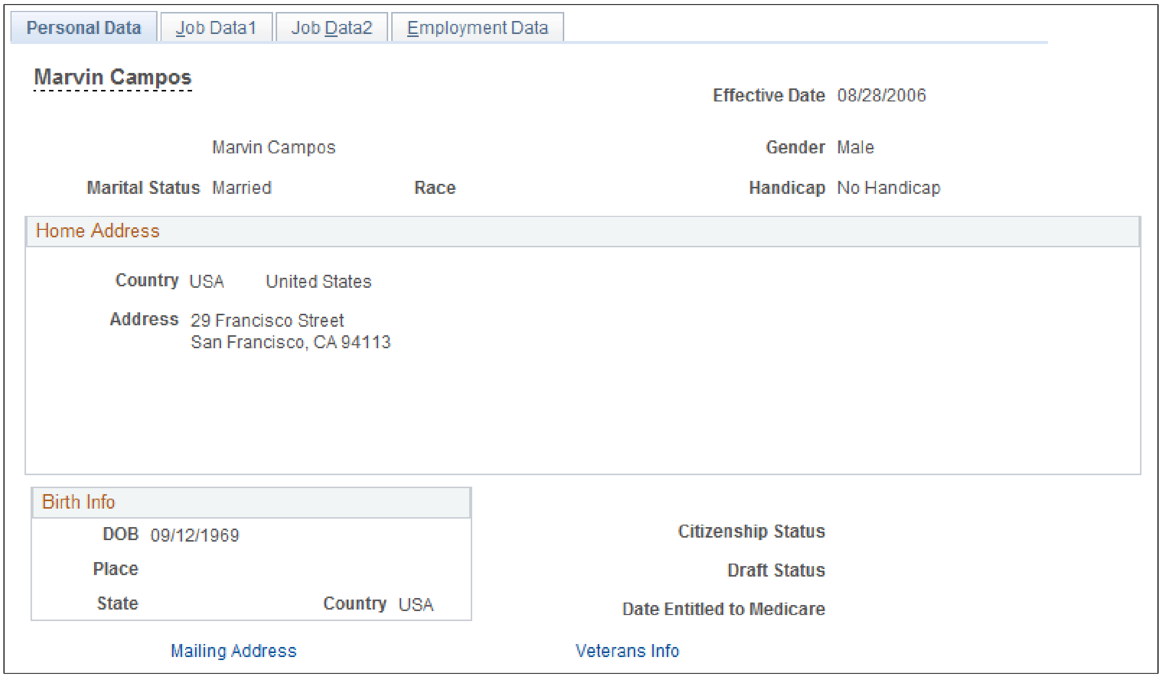
Personal Data USF - Personal Data Page

Use the Personal Data page (GVT_PERS_INQ) to view employee personal data.

Navigation:

Workforce Administration > **Job Information** > **Review Job Information** > **Personal Data USF** > **Personal Data**

This example illustrates the fields and controls on the Personal Data page. You can find definitions for the fields and controls later on this page.



The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the **Mailing Address** link to view the employee's mailing address. Click the **Veterans Info** link to view veteran's information for this employee.

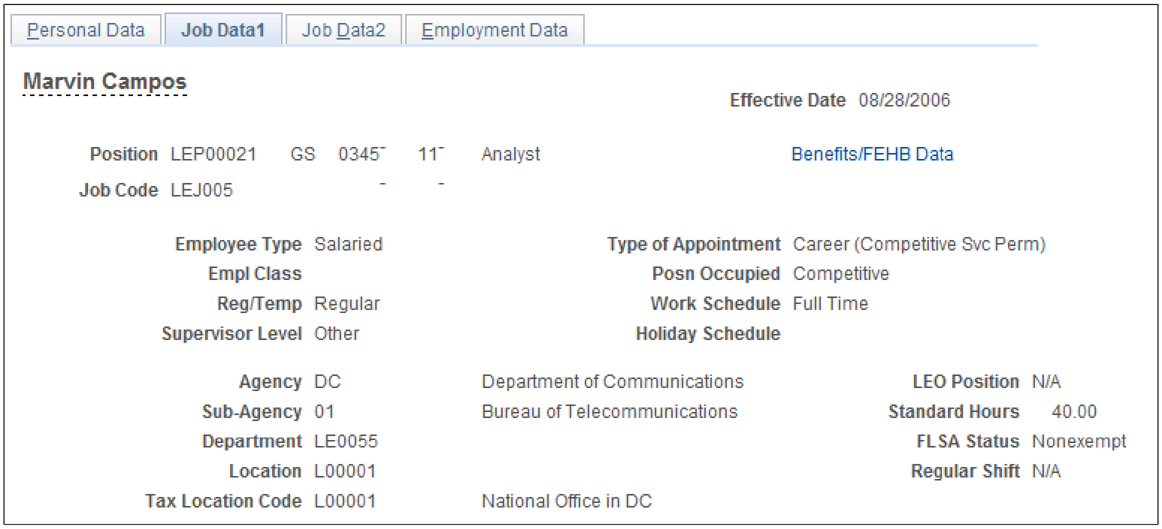
Job Data1 Page

Use the Job Data1 page (GVT_JOB_INQ) to view employee job data.

Navigation:

Workforce Administration > **Job Information** > **Review Job Information** > **Personal Data USF** > **Job Data1**

This example illustrates the fields and controls on the Personal Data - Job Data1 page. You can find definitions for the fields and controls later on this page.



This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the **Benefits/FEHB Data** link to view information on this employee's benefits and retirement data.

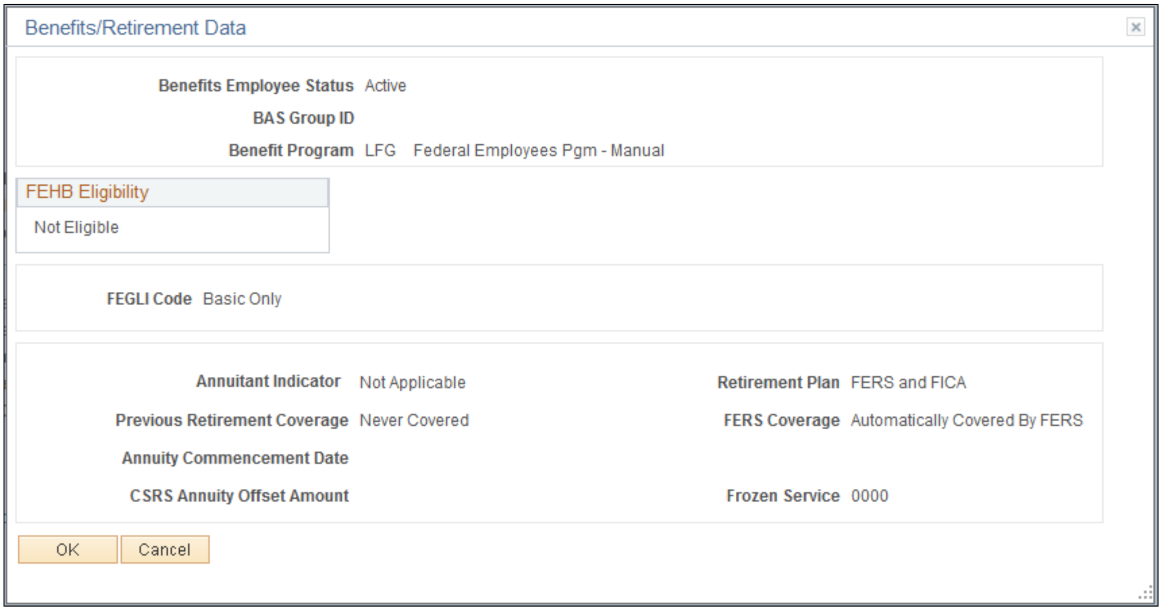
Benefits/Retirement Data Page

Use the Benefits/Retirement Data page (GVT_BENDAT_INQ_SEC) to view the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Navigation:

Click the **Benefits/FEHB Data** link on the Job Data1 page.

This example illustrates the fields and controls on the Personal Data - Job Data1: Benefits/Retirement Data page. You can find definitions for the fields and controls later on this page.



Related Links

"Understanding the Core Tables for PeopleSoft Manage Base Benefits" (PeopleSoft Human Resources Manage Base Benefits)

"Reviewing Employee Eligibility" (PeopleSoft Human Resources Manage Base Benefits)

"Enrolling Participants in Benefit Programs and Plans" (PeopleSoft Human Resources Manage Base Benefits)

Viewing Other Summary Pages in PeopleSoft Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Human Resources. Most of them derive information that you enter in other PeopleSoft Human Resources business processes, such as Planning Compensation, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- Employee Data Summary: Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and compensation-related information (**Benefits** > **Employee/Dependant Information** > **Review HR/Job/Payroll Data**).
- Organizational Summary: Displays a summary of all the organizational relationships for a person. (**Workforce Administration** > **Personal Information** > **Person Organizational Summary**).
- Career Assignment Summary: Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far (**Workforce Development** > **Career Planning** > **Review Career Summaries** > **Career Assignments**).

- Compensation History: Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases (**Compensation** > **Base Compensation** > **Review Salary Information** > **Employee Compensation History**). The Compensation History page is also in **Workforce Development** > **Career Planning** > **Review Career Summaries**.

- Immediate Family Summary: Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children (**Benefits** > **Employee/Dependant Information** > **Review Dep/Ben Summary**).

- Training Summary: Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs, to see if they've taken all course prerequisites, and for career and succession planning (**Administer Training** > **Result Tracking** > **Review Training Summary**).

- Injury Summary: Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents (**Workforce Monitoring** > **Health and Safety** > **Obtain Incident Information** > **Review Employee Injury Summary**).

Viewing Quick Analytics Headcount Pivot Grids

These topics provide an overview of pivot grids and discuss how to view headcount pivot grids.

Pages Used to Run Quick Analytics Reports

Page Name	***Definition Name***	***Usage***
Headcount Movement Pivot Grid	PTPG_PGVIEWER	Analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time.
Current Headcount Pivot Grid	PTPG_PGVIEWER	View the distribution of the organizational population. Administrators can view this information for employees, contingent workers, and persons of interest based upon the current job effective dated rows. Managers can view the distribution of the organizational population by job code based upon the current job effective dated rows.
Prompts Page	PTPG_USERPROMPTS	Enter the default values to further refine a query when you run it.

Page Name	Definition Name	Usage
Pivot Grid Data Page	PTPG_GRIDVIEWER	Select filter options and view a number count for those that meet the criteria
User Charting Options Page	PTPG_DISPLAYOPT	Define the display settings for the user results chart.
Pivot Grid Drilldown Page	PTPG_DRILLDN_PG	View a list of employees that make up the results for the bar or pie piece selected in the chart.

Understanding Headcount Pivot Grids

Pivot Grid functionality provides grid and chart visualization with the ability to filter data by any dimension and drill down on facts to the individual detail level. Pivot grids use PS Queries as the basis to gather data and then transform the results into easy to use pivot tables or charts.

PeopleSoft HCM delivers headcount pivot grids to enable your organization to take a proactive approach to planning, analyzing, and anticipating workforce needs by filtering and presenting data graphically, using different views. Headcount grids enable HR Administrators to view headcount data visually and filter this data to a more granular level. These grids also provide managers with additional insight into the organization, particularly when looking to restructure. Users view the data within the context of the transaction, ensuring proper data security based on their current security access settings used for other reports executed from Workforce Reports.

Video: Pivot Grid Overview

Video: PeopleSoft HCM 9.2 Pivot Grids

PeopleSoft HCM delivers these headcount pivot grids for the following users:

- Administrator
  - Headcount Movement - Shows administrators all job actions that occurred during the specified reporting period (the default chart renders the latest 12 months).
  - Current Headcount - Enables administrators to compare the distribution of the organizational population by employee, contingent worker, and persons of interest, based upon current job effective dated rows.
- Manager
  - Headcount Movement - Displays job actions of those that report to the logged-in manager that occurred during the specified reporting period.
  - Current Headcount - Allows managers to compare the distribution of the organizational population by job code based upon current job effective dated rows.

The headcount pivot grids are accessible from the Direct Reports pagelet on the Manager Dashboard (see “Viewing the Manager Dashboard Pagelets” (PeopleSoft eProfile Manager Desktop)).

To provide flexibility, you can define prompts to enable the user to display the data they need in the pivot grid.

Filters can be applied to the data to further slice it for analysis. Once the results are rendered, the user is able to drill down to the data details and interact with the data in a table format.

You can use the delivered pivot grids, or quickly configure your own using a 5 step setup wizard based off of any PS Query. For more information on Pivot Grid functionality, see the product documentation for *PeopleTools: PeopleSoft Pivot Grid*.

Note: Pivot grids require that you use PeopleTools 8.53, or greater.

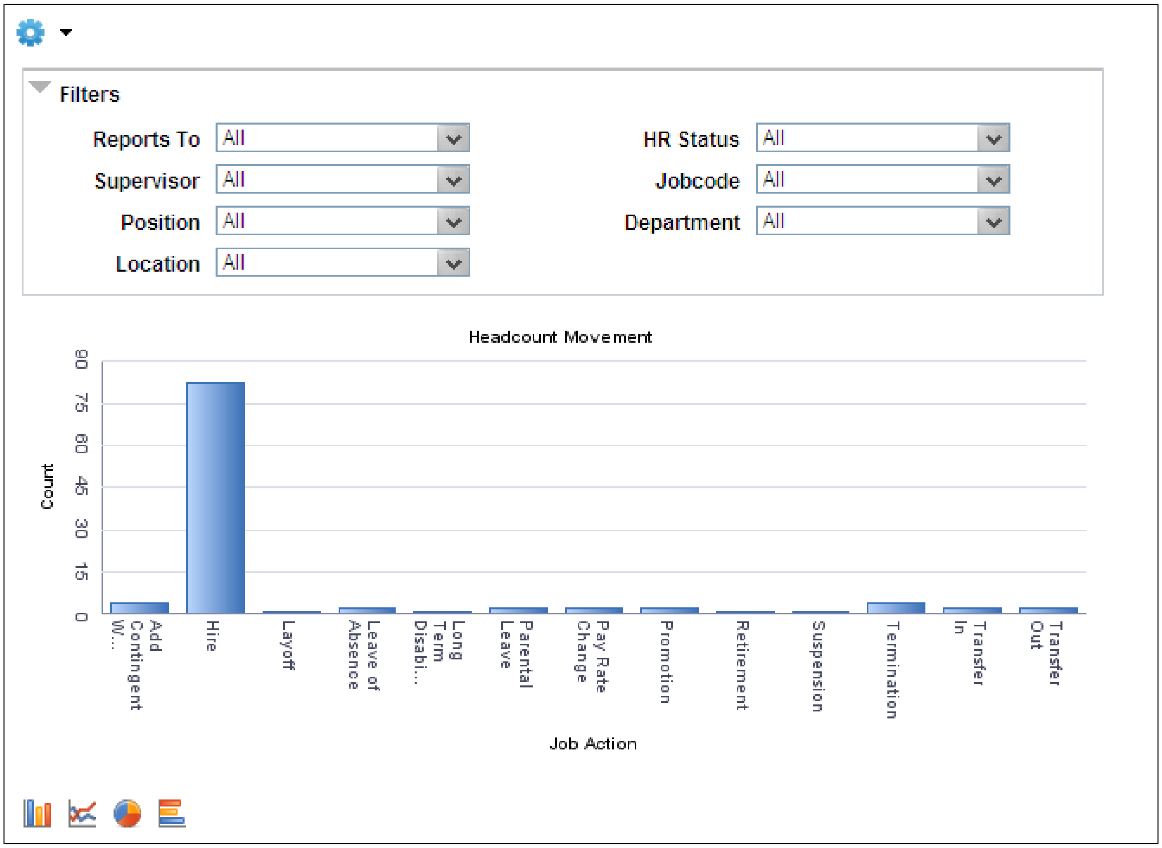
Headcount Movement Pivot Grid

Use the Headcount Movement pivot grid page (PTPG_PGVIEWER) to analyze the headcount movement within your organization.

Navigation:

- **Workforce Administration** > **Workforce Reports** > **Quick Analytics** > **Headcount Movement**
- **Manager Self Service** > **Manager Dashboard** and then select the **Headcount Analytics** link, **Headcount Movement** link at the bottom of the Direct Line Reports pagelet.

This example illustrates the fields and controls on the Headcount Movement page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Filters	Select values from the following filter drop-down fields to narrow your report results. • **Reports To** • **HR Status** • **Supervisor** • **Direct/Indirect** (manager page only) • **Job Code** • **Position** • **Department** • **Location** All fields are set to *All* as a default value. The drop-down list contains values you can select or deselect, to enable you to include one or many criteria options for a field. For example, you can choose to view the results of one department, such as Finance, several departments, such a Finance and Human Resources, or select to include all valid departments in the drop-down list. When you select various options, the field will display *(Multiple Items)*. Use the **Select All** check box in the drop-down list to select or deselect all field values. When you have not selected any items for the field, the filter field will default back to *All*. The chart will update dynamically after selecting criteria for each filtering field. As you select items within each filtering field, other filter fields may be hidden or shown as display only, based on valid values that are available based on your current filter settings. For example, if you select a specific manager in the Supervisor field, only job codes associated with his employees will be available in the **Jobcode** field. If all the people reporting to this manager have the same job code, then the page presents the **Jobcode** field as display only with that one job code as the filter value. To refresh the chart, change the available filter fields to *All*. This will reset the other fields in the Filter group box.

The page displays the chart in the middle of the page, based upon the search criteria filter settings. You can change how the chart appears by selecting from one of these icons at the bottom of the page:

- Bar Chart
- Line Chart
- Pie Chart
- Horizontal Bar Chart

Pause over individual graphic items, such as a bar or pie, to view the job action details and count. Select the bar or pie piece to select from the following options:

- Detailed View:

  Select this option to access the Pivot Grid Drilldown page to view a list of employees that make up the results for the bar or pie piece.

- Drilldown To:

  Administrators can select this option to analyze report data by categories, such as:

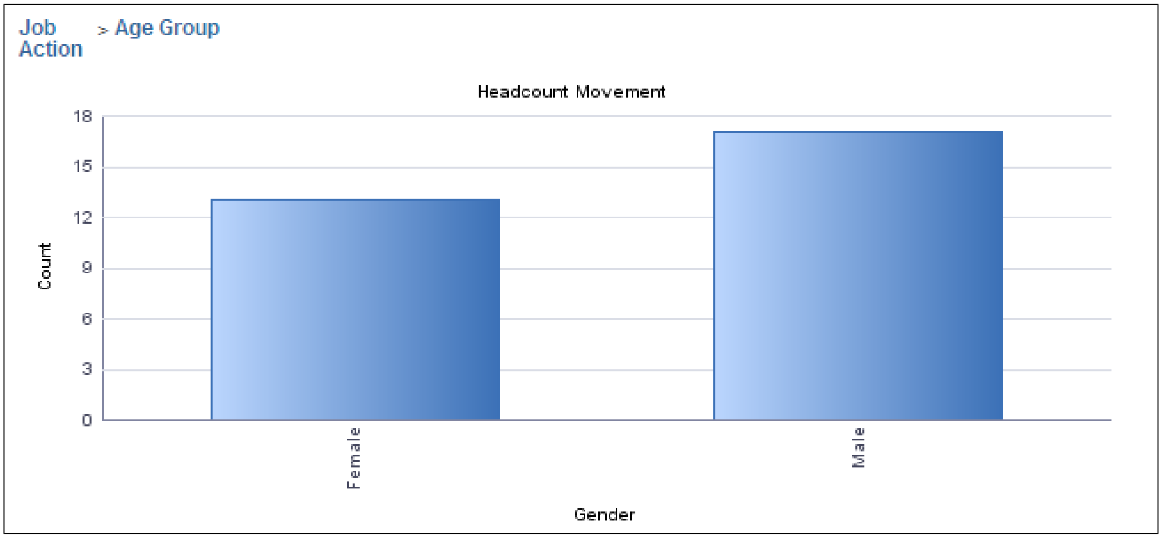
  - Full/Part time status
  - Age group
  - Paygroup
  - Gender
  - Marital status
  - Regulatory region
  - Salary administration plan
  - Establishment

  Managers can select this option to analyze report data by categories, such as:

  - Full/Part time status
  - Salary administration plan
  - Regulatory region
  - Establishment

  You can perform drill-downs within a drill-down. When you do this, the page displays a set of breadcrumbs above the graphic to show the drill-down path you have taken.

For example, you can drill-down to view those people with a job action of *Hire* by age and then drill down again to view the gender of the people in the 35-44 age category. In the example shown here, the first bread crumb is Job Action (Hire), then Age Group (35-44), and the current graphic shows the Gender categories within the previously selected hires between the ages of 35 and 44:



Select any bread crumb to return to that view of the chart.

Current Headcount Pivot Grid

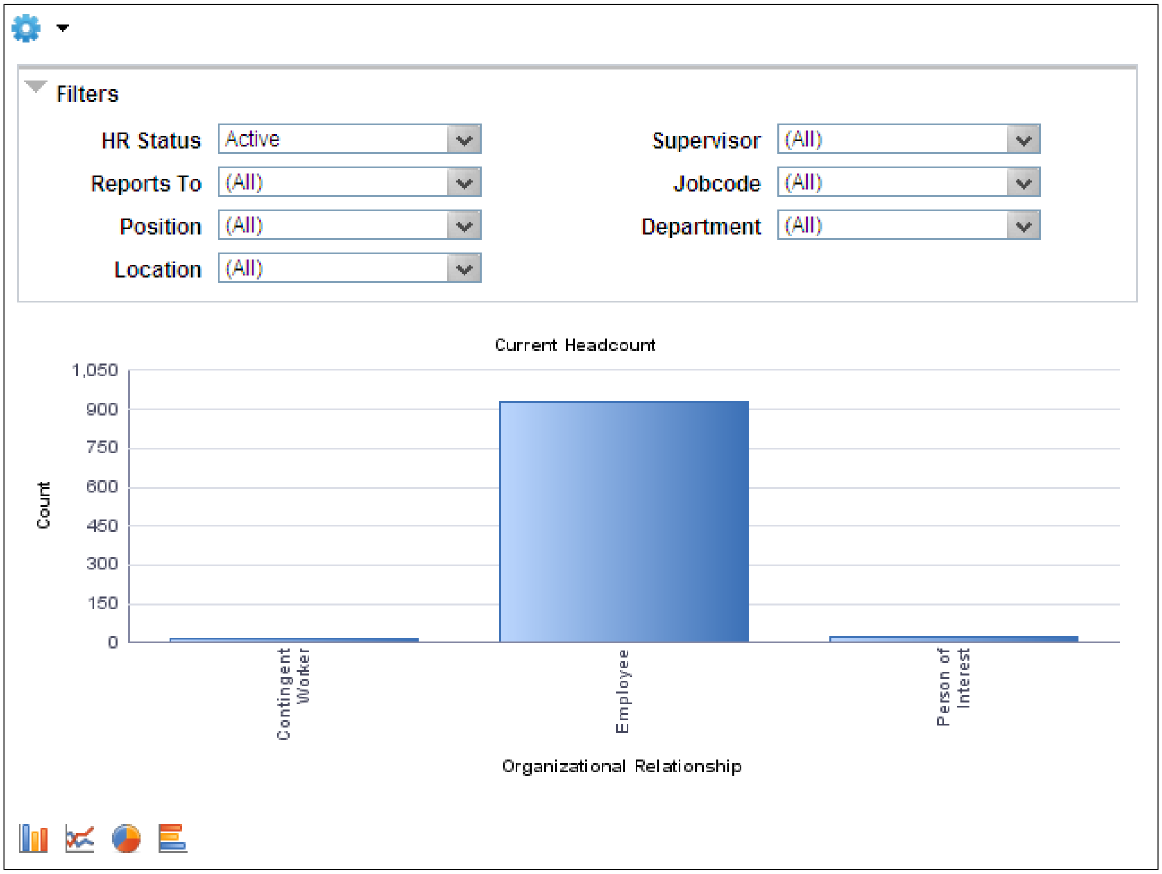
Use the Current Headcount pivot grid page (PTPG_PGVIEWER) to view the distribution of the organizational population.

Administrators can view this information for employees, contingent workers, and persons of interest based upon the current job effective dated rows. Managers can view the distribution of the organizational population by job code based upon the current job effective dated rows.

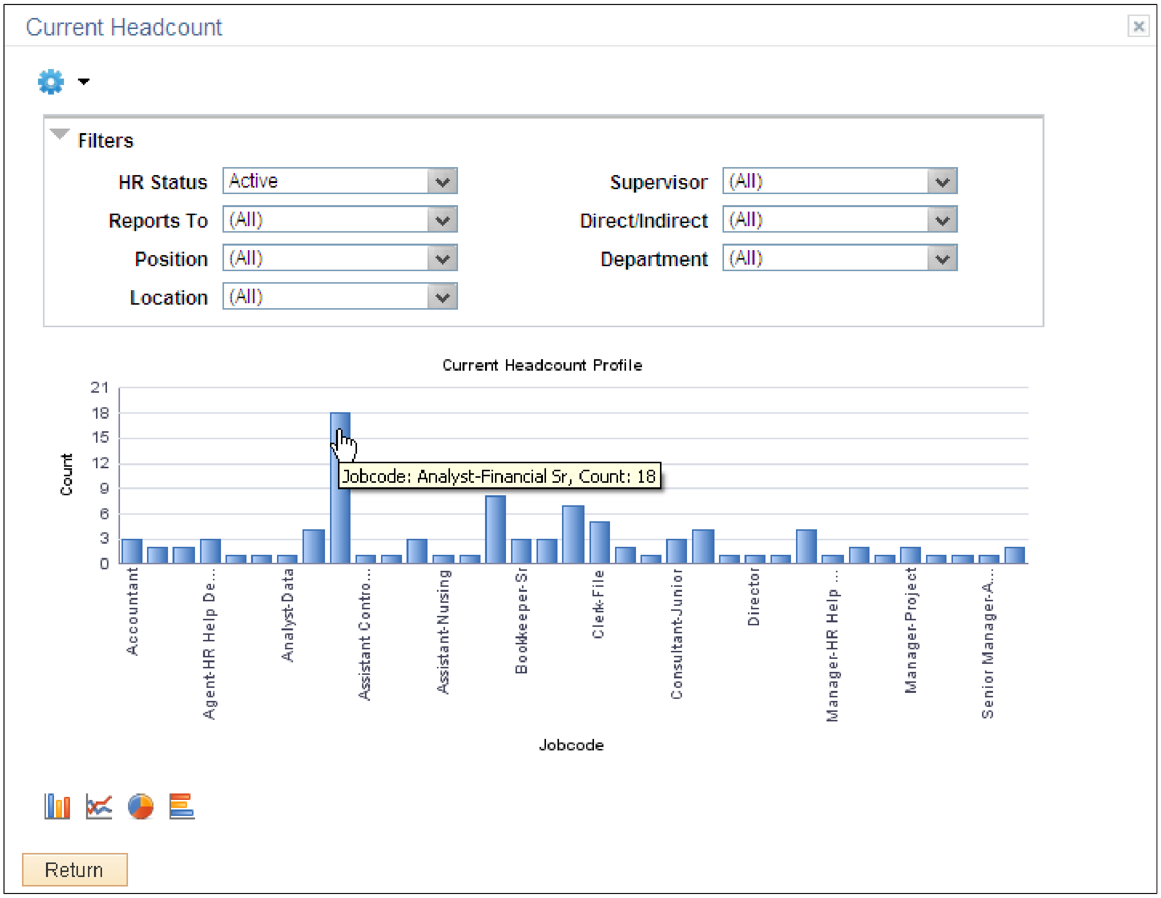
Navigation:

- **Workforce Administration** > **Workforce Reports** > **Quick Analytics** > **Current Headcount**
- **Manager Self Service** > **Manager Dashboard** and then select the **Headcount Analytics** link, **Current Headcount** link at the bottom of the Direct Line Reports pagelet.

This example illustrates the fields and controls on the Current Headcount page for the administrator. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Current Headcount page for the manager. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Filters	Select values from the following filter drop-down fields to narrow your report results. • **HR Status** • **Reports To** • **Position** • **Location** • **Supervisor** • **Job Code** (administrator page only) • **Direct/Indirect** (manager page only) • **Department** All fields are set to *(All)* as a default value (with the exception of the **HR Status** field for the administrator view, which defaults to *Active*). The drop-down list contains values you can select or deselect, to enable you to include one or many criteria options for a field. For example, you can choose to view the results of one department, such as Finance, several departments, such a Finance and Human Resources, or select to include all valid departments in the drop-down list. When you select various options, the field will display *(Multiple Items)*. Use the **(Select All)** check box in the drop-down list to select or deselect all field values. When you have not selected any items for the field, the filter field will default back to *(All)*. The chart will update dynamically after selecting criteria for each filtering field. As you select items within each filtering field, other filter fields may be hidden or shown as display only, based on valid values that are available based on your current filter settings. For example, if you select a specific manager in the **Supervisor** field, only locations associated with the manager's employees will be available in the **Location** field. If all the people reporting to this manager have the same location, then the page presents the **Location** field as display only with that one location as the filter value. To refresh the chart, change the available filter fields to *All*. This will reset the other fields in the **Filters** group box.

The page displays the chart in the middle of the page, based upon the search criteria filter settings. You can change how the chart appears by selecting from one of these icons at the bottom of the page:

- Bar Chart
- Line Chart
- Pie Chart

- Horizontal Bar Chart

Pause over each graphic items, such as a bar or pie, to view the organizational relationship (administrator) or job code (manager) details and count. Select the bar or pie piece to choose from the following options:

- Detailed View:

  Select this option to access the Pivot Grid Drilldown page to view a list of employees that make up the results for the bar or pie piece.

- Drilldown To:

  Administrators can select this option to analyze report data by categories, such as:

  - Business unit
  - Full/Part time status
  - Age group
  - Paygroup
  - Gender
  - Marital status
  - Regulatory region
  - Salary administration plan
  - Establishment

  Managers can select this option to analyze report data by categories, such as:

  - Full/Part time status
  - Organizational relationship
  - Salary administration plan
  - Regulatory region
  - Establishment

  You can perform drill-downs within a drill-down. When you do this, the page displays a set of breadcrumbs above the graphic to show the drill-down path you have taken. Select any bread crumb to return to that view of the chart.

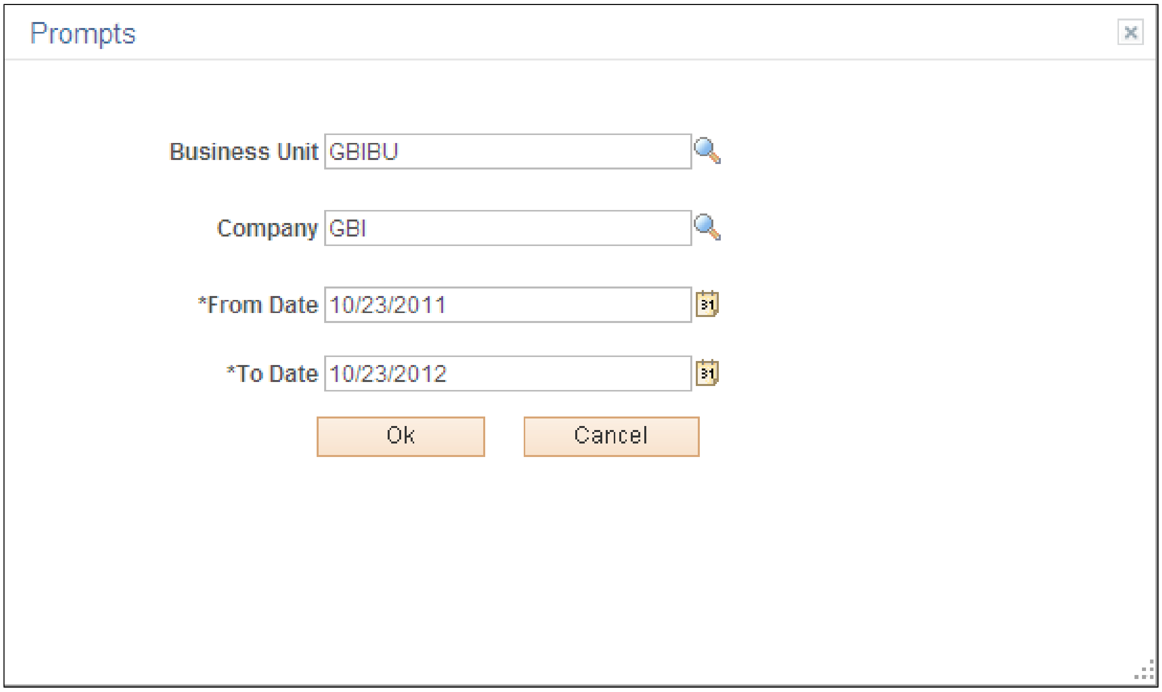
Prompts Page

Use the Prompts page (PTPG_USERPROMPTS) to enter the default values to further refine a query when you run it.

Navigation:

Select the **Prompts** option from the **Options Menu** drop-down arrow above the **Filters** group box on the Headcount Movement or Current Headcount page.

This example illustrates the fields and controls on the Prompts page for the administrator view of the Headcount Movement pivot grid.



The pivot grids will rendered data for values defined on the Prompts page. The initial values come from the primary permission list assigned to the user. You can change the prompt values during a session of viewing a pivot grid, but they default values will reset to those values associated with the primary permission list for the user after exiting a pivot grid.

The Prompts page and its corresponding fields are available for the following headcount pivot grids:

- Current Headcount (administrator view)
  - **Business Unit**
  - **Company**
- Headcount Movement (administrator view)
  - **Business Unit**
  - **Company**
  - **From Date**
  - **To Date**
- Headcount Movement (manager view)
  - **From Date**
  - **To Date**

Note: The from and to dates default to the last 12 months.

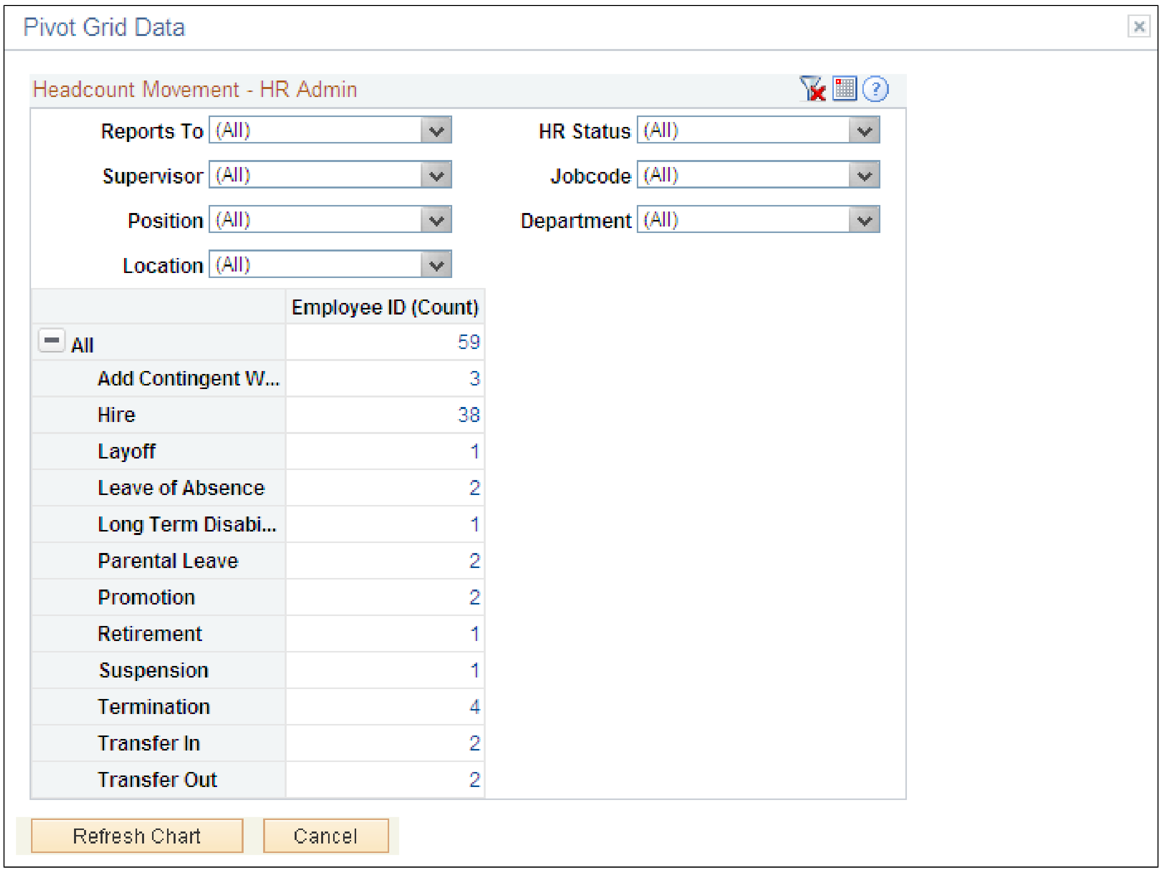
Pivot Grid Data Page

Use the Pivot Grid Data page (PTPG_GRIDVIEWER) to select filter options and view a number count for those that meet the criteria in a grid format.

Navigation:

Select the **View Grid** option from the **Options Menu** drop-down arrow above the **Filters** group box on the Headcount Movement or Current Headcount page.

This example illustrates the fields and controls on the Pivot Grid Data page.



Use this page to view the pivot grid data as a list in a modal window. Use the filters the same as you would on the Current Headcount Pivot Grid or Headcount Movement Pivot Grid.

Select the count number link to access the Pivot Grid Drilldown page and view details about the count you selected.

Select the **Refresh Chart** button to return to the graphical view of the information reflecting the filters you set on the Pivot Grid Data page.

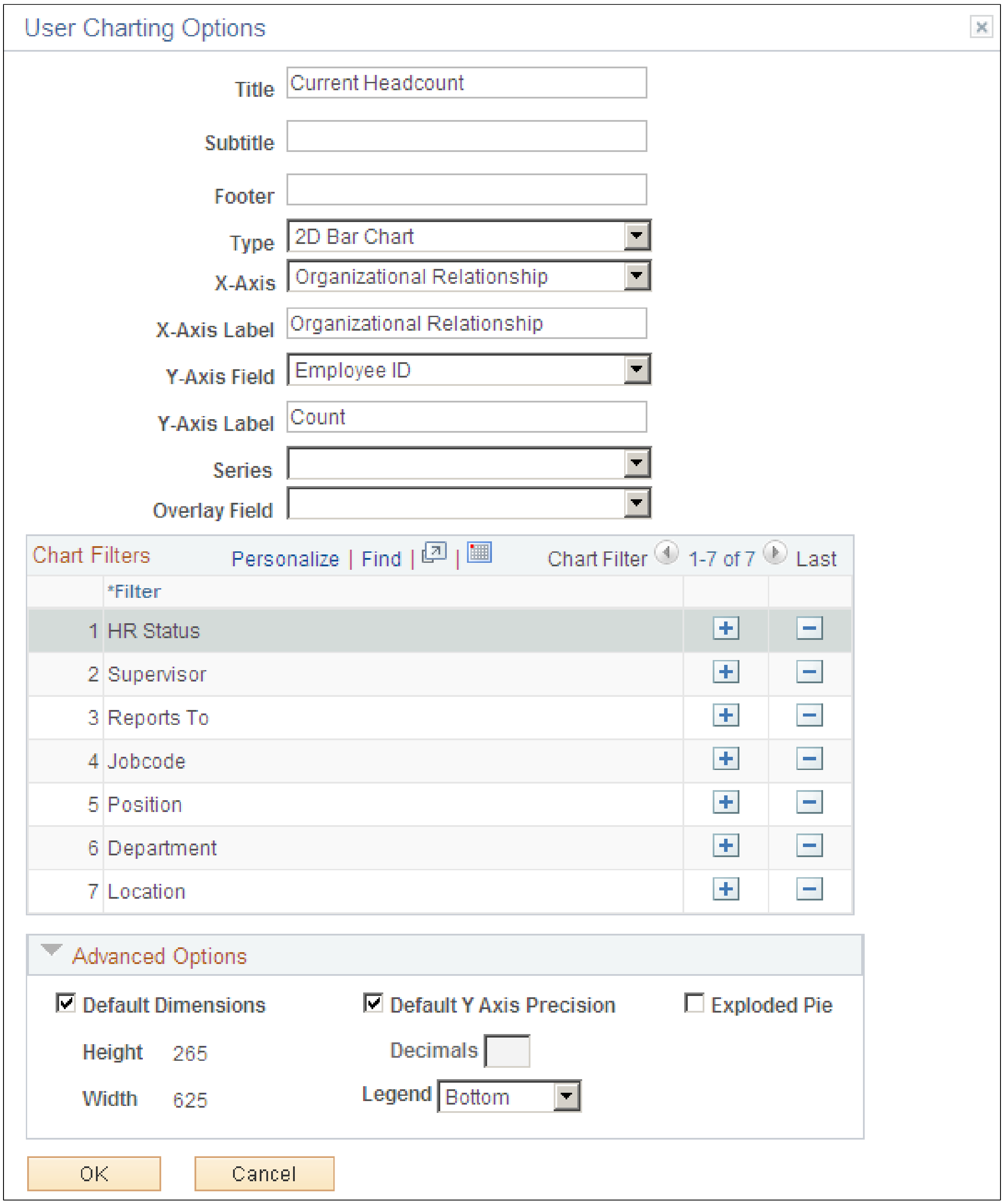
User Charting Options Page

Use the User Charting Options page (PTPG_DISPLAYOPT) to define the display settings for the user results chart.

Navigation:

Select the **Chart Options** item from the **Options Menu** drop-down arrow above the **Filters** group box on the Headcount Movement or Current Headcount page.

This example illustrates the fields and controls on the User Charting Options page.



Use this page to change the chart title, chart type, data to be displayed on the x axis, data to be displayed on the y axis, or add or delete chart filters. Changes you make here are good for the current session of viewing the pivot grid.

For example, if you want to view a headcount profile by full time/part time status, select *Full/Part Time* from the **X Axis** drop-down list and click **OK**. The chart will refresh and display the full/part time label and data on the X axis.

Chart Filters

Select the add a row icon button to include additional filters. Filter options vary according to the pivot grid and administrator or manager access.

Select the delete row icon button to remove filter options for this session.

Advanced Options

Field or Control	***Description***
Default Dimensions	Select this check box to have the system default the 265 height and 625 width for the bar or pie graphic. Deselect this check box to enter your own height and width.
Default Y Axis Precision and **Decimals**	Select to have the system default the decimal precision of 0. Deselect this check box to enter your own decimal precision number in the **Decimals** field.
Legend	Identify where the legend of the chart should appear. Valid values are: • *Bottom* • *Left* • *None* • *Right* • *Top*
Exploded Pie	Select this check box to detach the pieces of a pie graphic.

Viewing Workforce Composition Insights

Administrators can use the Workforce Composition dashboard to evaluate employee counts within their organization. Based on user privileges and criteria, such as date range, departments, and full- or part-time status, administrators can analyze their employee workforce numbers, or a subset, that have been updated within the date range specified.

The Workforce Composition dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Workforce Composition data that is visible on the dashboard comes from the Person Global Search index *HC_HR_PERSON*.

This topic provides an overview of how to set up the Insights Dashboard for Workforce Composition analytics and discusses the PeopleSoft Insights Dashboards for Workforce Composition.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology:* “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation

Pages Used to View Workforce Composition Insights

Page Name	***Definition Name***	***Usage***
Workforce Composition Tile	HC_WORKFORCE_COMP_FL (this is the cref for the tile)	Access Insights visualizations related to employee number counts that have experienced person data changes over a period of time. The data represented is based on your row level security.
Workforce Composition Dashboard	HC_WORKFORCE_COMP_FL (this is the cref for the dashboard) KIBANA_COMP (this is the cref for the dashboard) PTSF_KIBANA_COMP	Review Insights visualizations related to number counts for employees that have experienced person data changes during a specified period. The data represented is based on your row level security.

Understanding How to Set Up the Insights Dashboard for Workforce Composition Analytics

Before administrators can access the visualizations for Workforce Composition data, the following steps should be performed:

1. Deploy the *HC_HR_PERSON* (Person) index.

(**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Deploy/Delete Object**)

2. Build the *HC_HR_PERSON* search index.

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Schedule Search Index**)

3. Deploy the *Workforce Composition Tile* and *Workforce Composition* dashboard.

   (**PeopleTools** > **Search Framework** > **Administration** > **Deploy Insights Dashboards**)

   Note: The full index must be run before the dashboard can be deployed

4. Assign the *Workforce Composition Admin* role to users that should be granted access to view the Workforce Composition dashboard.

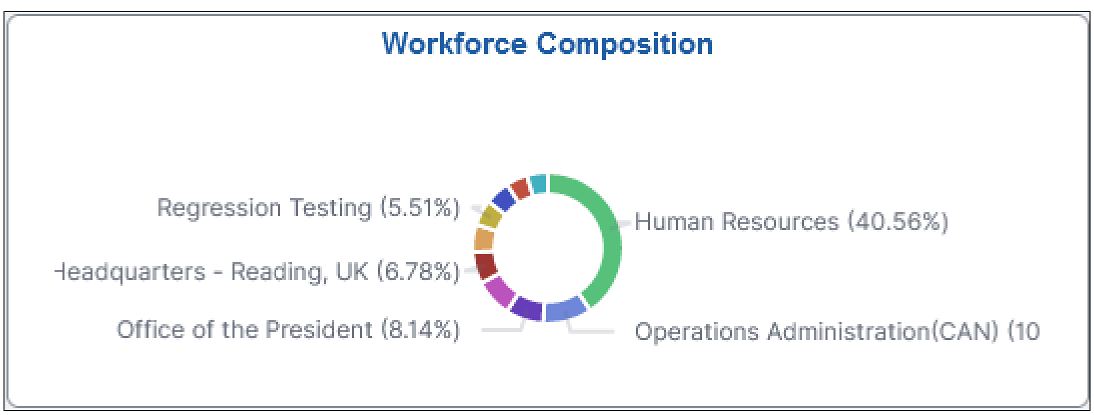
Workforce Composition Tile

Use the Workforce Composition tile to access Insights visualizations related to employee number counts that have experienced person data changes over a period of time. The data represented is based on your row level security.

Navigation:

From the Workforce Administrator home page, click the Workforce Insight Tile. The Workforce Composition tile is located on the Workforce Insight Dashboard.

This example illustrates the Workforce Composition tile.



The tile displays the **Employee by Department** donut visual by default. Select the tile to access the Workforce Composition Dashboard.

Workforce Composition Dashboard

Use the Workforce Composition dashboard to review Insights visualizations related to number counts for employees that have experienced person data changes during a specified period. The data represented is based on your row level security.

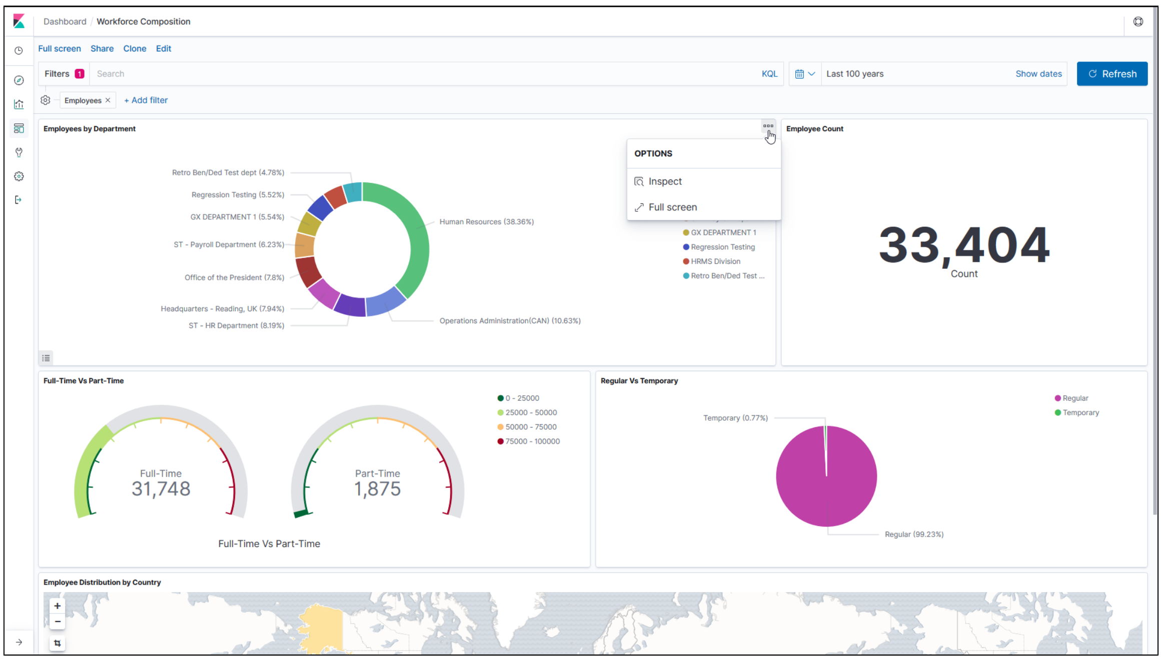
Note: This dashboard displays employee number counts for employees with personal data changes during the specified period. Persons of interest and contingent workers are not included in these analytics.

Navigation:

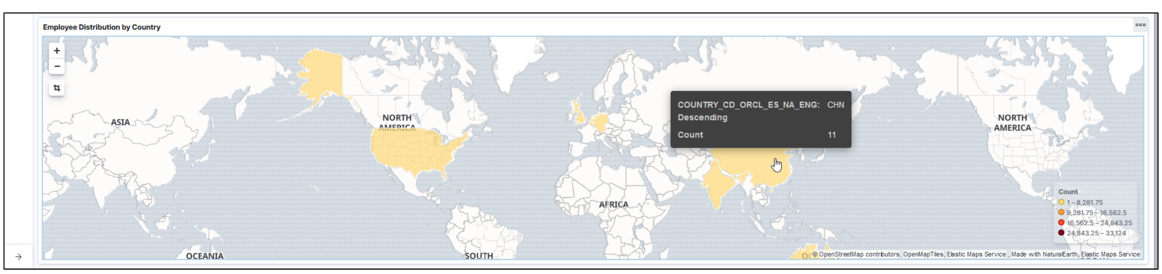
Select the Workforce Composition Tile from the Workforce Insight dashboard.

Note: You must be assigned the *Workforce Composition Admin* role to view this dashboard.

This example illustrates the Workforce Composition dashboard (1 of 2). This screenshot shows one filter in place, which has the visualizations display data for employees only. It also shows the Options and Legend icons that will display when you pause over a visualization.



This example illustrates the Workforce Composition dashboard (2 of 2). This screenshot shows the popup menu details that appears when you pause over a chart item.



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Workforce Composition dashboard provides you with different visualizations to analyze employee composition data modified within a specified time frame. Note that the delivered default time period is set to 15 years, but you can modify this filter at the top of the page. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart, table or map to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Delivered Workforce Composition Visualizations

The Workforce Composition dashboard provides this collection of visualizations based on your filter settings, such as date range of person data changes:

Visualization	*Description*
Employees by Department	This doughnut visualization displays the top 10 departments based on employee count. It shows the percentage of employees per department in relation to other the departments shown in the chart. Pause over a chart item to view the number of employees in a department that have experienced person data changes within the date range specified.
Employee Count	This visualization displays a count of employees within the specified parameters.
Full-Time Vs Part-Time	This visualization displays two gauges: one showing the count of full-time employees, one showing the count of part-time employees. Pause over a gauge bar to view the number of employees in the group.
Regular Vs Temporary	This pie chart visualization shows the percentage of employees that are regular employees versus those that are temporarily employed. Pause over a pie slice to view the number of employees in the group.
Employee Distribution by Country	This map visualization displays a map of where employees are located world-wide.

Viewing Workforce Equity Insights

Administrators can use the Workforce Equity dashboard to evaluate workforce equity data. Based on their user privileges and criteria, like gender and ethnicity, administrators can analyze diversity and compensation for the entire workforce or for a subset of the organization.

The PeopleSoft Workforce Equity dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. This dashboard is built on workforce equity data and uses search index *HC_HR_WF_DIVERSITY*.

This video provides an overview of the Workforce Equity Insights feature:

Video: Image Highlights, PeopleSoft HCM Update Image 34: HCM Insights

This topic provides an overview of how to set up the Insights dashboard for Workforce Equity analytics, lists common elements and controls, and discusses the PeopleSoft Insights Workforce Equity dashboard.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology:* “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Pages Used to View Workforce Equity Insights

Page Name	***Definition Name***	***Usage***
Workforce Equity Tile	HC_WORKFORCE_EQUITY (this is the cref for the tile)	Access and view HR workforce equity analytics that are based on diversity and compensation. For example, view employee data by job code, gender, ethnic group, compa-ratio information, and country.
Workforce Equity Dashboard	KIBANA_COMP (this is the cref for the dashboard) PTSF_KIBANA_COMP	Review Insights visualizations related to workforce equity.

Note: The Workforce Diversity (HC_HR_WF_DIVERSITY) search index, which allows administrators to view workforce equity data, supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide search results using the latest information.
For more information about Real Time Indexing, refer to PeopleTools Search Technology, “Administering Real Time Indexing."

Understanding How to Set Up the Insights Dashboard for Workforce Equity Analytics

Before administrators can access the visualizations for Workforce Equity data, the following steps should be performed:

1. Deploy the *HC_HR_WF_DIVERSITY* (Workforce Diversity) index.

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Deploy/Delete Object**)

2. Build the *HC_HR_WF_DIVERSITY* search index.

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Schedule Search Index**)

3. Deploy the *Workforce Equity Tile* and *Workforce Equity* dashboard.

   (**PeopleTools** > **Search Framework** > **Administration** > **Deploy Insights Dashboards**)

   Note: The full index must be run before the dashboard can be deployed

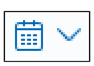
4. Assign the *HR Analytics Administrator* role to users that should be granted access the Workforce Equity dashboard.

Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Term	***Definition***
 (See saved queries)	Click to save the current query text and filters that you want to reuse in the future, or select an existing query to use to update the visualizations.
Search field	Enter a query to filter data, if applicable.

Term	***Definition***
 (Change all filters), and + **Add filter**	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + **Add filter** link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the Employee Details grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + **Add filter** link for reference. For example, when you click a doughnut chart item, the filter is automatically added to your filters list. When you click the horizontal bar item for the *18-24* age group for females, the system will prompt you to add the *Age Range: 18-24* and *Gender: F* filters since this item consists of more than one filter. Click the **Change all filters** icon for a list of actions that can be performed on *all* filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.
 (Calendar) or **Show dates**	Click to select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, *This week*, or *Last 30 days*, click the **Show dates** link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is *Year to date*. Clicking the **Show dates** link displays ~ *10 months ago —> now*, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.
Business Unit, **Location**, and **Department**	Select to filter data by business unit, followed by location, and then by department. You must select a business unit before selecting a location. A location must be specified before you can filter data by department.

When you pause over a visualization, the Options and Legend icons (if applicable) are displayed on the top right and bottom corners respectively. Use them to inspect the chart or table and view the details of that visualization, and toggle the legend display.

Term	***Definition***
(Options)	Pause over the Options icon to select one of these options: • *Inspect*: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • *Maximize panel* or *Minimize*: Select *Maximize panel* to have the page display only this visualization in full screen. Select *Minimize* to return to the dashboard and display all visualizations.
(Toggle legend)	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Workforce Equity Tile

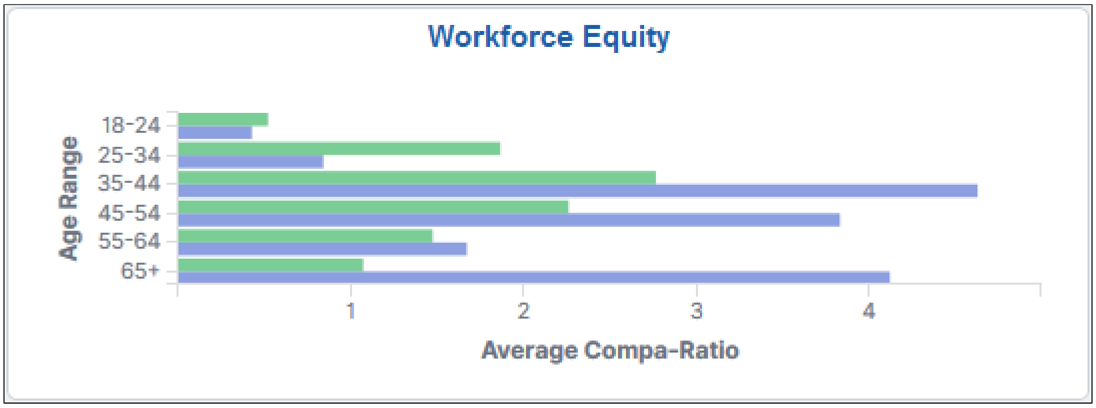
Use the Workforce Equity tile to access and view HR workforce equity analytics that are based on diversity and compensation. For example, view employee data by job code, gender, ethnic group, compa-ratio information, and country.

Navigation:

Workforce Administrator home page > **Workforce Insight tile**

From the Workforce Administrator homepage, click the Workforce Insight Tile. The Workforce Equity tile is located on the Workforce Insight Dashboard.

This example illustrates the Workforce Equity tile.



The Workforce Equity tile displays the **Compa-ratio by Age and Gender** graph.

Click this tile to access the Workforce Equity Dashboard and analyze visualizations related to diversity and compensation information for your workforce.

Workforce Equity Dashboard

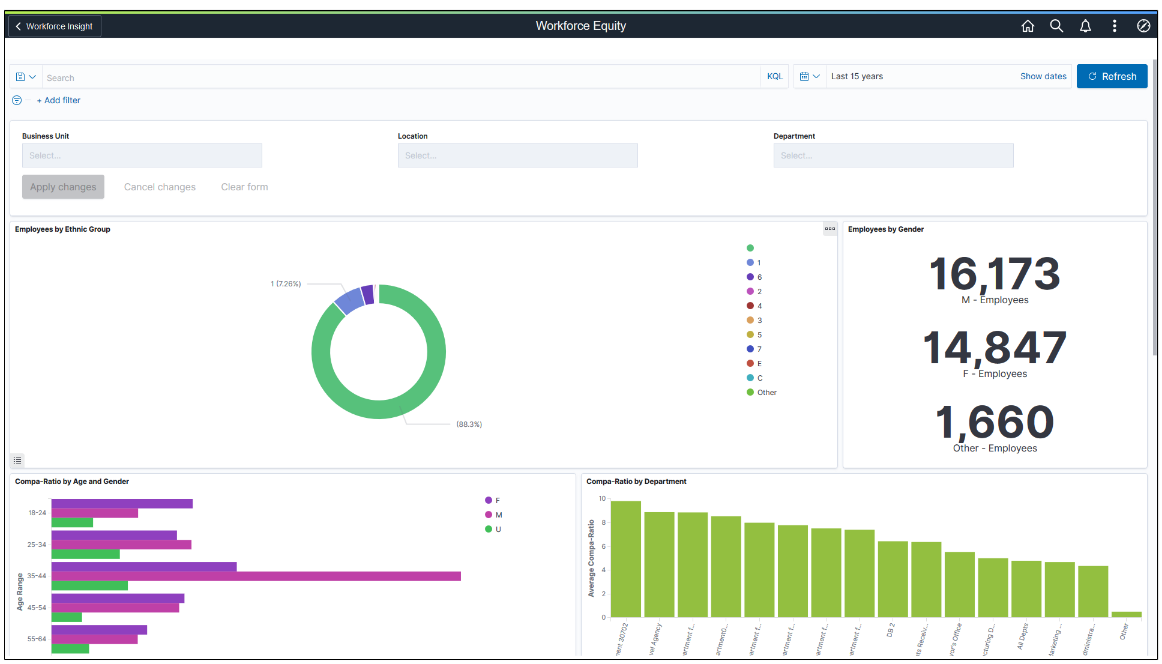
Use the Workforce Equity dashboard to review Insights visualizations related to workforce equity.

Navigation:

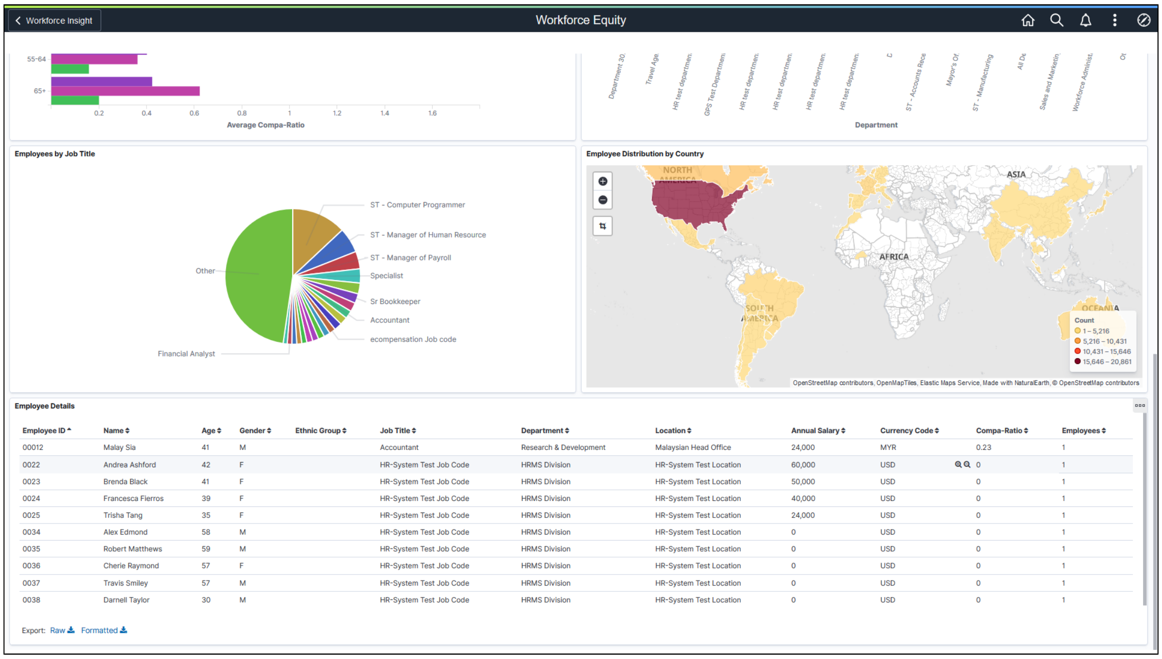
Workforce Administrator home page > **Workforce Insight tile** > **Workforce Equity tile**

You must be assigned the *HR Analytics Administrator* role to view this dashboard.

This example illustrates the Workforce Equity dashboard (1 of 2).



This example illustrates the Workforce Equity dashboard (2 of 2).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

Workforce Equity Visualizations

The Workforce Equity dashboard provides you with different visualizations to analyze workforce equity data. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Note: The dashboard uses role level security to display permitted data to the user.

Important! For optimal performance, only the first 500 rows of data are displayed on the dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

The Workforce Equity dashboard provides this collection of visualizations:

Visualization	***Description***
Employees by Ethnic Group	This doughnut chart visualization displays the number and percentage of employees that are included in an ethnic group. The chart displays the top 30 ethnic groups (based on count). Employees that indicate more than one ethnicity will appear in a *Two or More* group.
Employees by Gender	This visualization displays a count of males, females, and others (those with undefined genders).

Visualization	***Description***
Compa-Ratio by Age and Gender (comparison ratio by age and gender)	This horizontal bar graph visualization displays the average compa-ratio calculation by age groups and then grouped by male and female within those categories. Compa-ratio allows you to see where workers' salaries lie in relation to the midpoint range for their salary grades. Age groups include: • 18–24 • 25–34 • 35–44 • 45–54 • 55–64 • 65+ **Note:** The system calculates the ratio by comparing the worker salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, then the compa-ratio is 1.00, or 100 percent, of the midpoint. If the rate is above or below the midpoint, the system calculates a ratio for the difference between the salary and the midpoint, and then it adds or subtracts the difference from 1.00. If there is no defined midpoint, the compa-ratio will be 0. The system then averages all the compa-ratios for employee's within a group, and displays that number on the chart.
Compa-Ratio by Department (comparison ratio by department)	This vertical bar graph visualization displays the average compa-ratio calculation by department. The chart displays the top 15 departments (based on highest compa-ratio values) at a time. The *Other* department item contains information for all others departments that were not included in top 15 departments. Select the *Other* department bar item to display the next 15 departments in the list. For more information on compa-ratio calculations, see the **Compa-Ratio by Age and Gender** field descriptions above.
Employees by Job Code	This pie chart visualization displays the count and percentage of employees assigned to a job code. The chart displays the top 20 job codes (based on employee count) and the percentages are based on the job codes that appear in the chart. Select the *Other* job code item to display the next 20 job codes in the list.

Visualization	*Description*
Employee Distribution by Country	This map visualization displays a map of where employees are located world-wide.

Employee Details Grid

The **Employee Details** grid lists the employees, which are presented in visualizations, in a tabular format, providing a summary of all visualization data based on the selected filters.

Field or Control	*Description*
(Sort column heading)	Click a column heading to sort grid rows by the column value in ascending or descending order.
(Filter for value) and (Filter out value)	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter to all visualizations. For example, if you click to filter for a **Department** value, all visualizations will refresh to show employees for that department. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filter process for all visualizations. For example, if you click to filter out the *HRMS Division* value in the **Department** column, visualizations will refresh to show information for any type except *HRMS Division*. Filters can be removed from the Filters area at the top of the page.
Raw or **Formatted**	Click to export data from the grid into a .csv file format.

Viewing Remote Worker Insights

PeopleSoft Remote Worker Dashboard and Remote Worker Insight dashboards provide managers and administrators the ability to view and analyze remote worker data using PeopleSoft Insights visualizations.

Based on user privileges, managers and administrators can access the visualizations delivered on the Remote Worker Dashboard and Remote Worker Insights Dashboard to monitor the remote workforce and identify worker types by location, department, and the amount of time working remote. While administrators have access to remote worker information for the entire company, managers are given a view of just the employees that mean the most to them, their direct and indirect reports.

These remote worker analytic dashboards are built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Remote worker data that is visible on the administrator's and manager's dashboards come from various search indexes.

These videos provide an overview of the Insights Remote Worker feature:

Video: Image Highlight, PeopleSoft HCM Update Image 40: Remote Worker

Video: PeopleSoft Remote Worker

Video: Image Highlights, PeopleSoft HCM Update Image 42: Remote Worker Dashboard for the Manager

Video: Image Highlights, PeopleSoft HCM Update Image 44: Additional Remote Worker Analytics

Video: PeopleSoft Remote Worker Insights

Video: Image Highlights, PeopleSoft HCM Update Image 45: Remote Worker Vaccination Visualization

This topic provides an overview of how to set up Insights dashboards for remote worker analytics, lists common elements and controls, and discusses the PeopleSoft Insights Remote Worker dashboards.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology:* “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Pages Used to View Remote Worker Insights

Page Name	***Definition Name***	***Usage***
Remote Worker Insight Tile (for Administrators)	HC_HR_REMOTE_WORK_INSIGHTS_FL (this is the cref for the tile)	Access and view HR remote workforce Insights analytics as an administrator.
Remote Worker Insights Dashboard (for Administrators)	PTSF_KIBANA_COMP	Review and analyze remote worker data using visualizations as an administrator.

Page Name	***Definition Name***	***Usage***
Remote Worker Dashboard Tile (for Managers)	HC_HR_RW_MGR_DSHBRD_FL (this is the cref for the tile)	Access and view HR remote workforce analytics as a manager to view information for employees under your supervision.
Remote Worker Dashboard (for Managers)	PTSF_KIBANA_COMP	Review and analyze remote worker data visualizations as a manager to see data for employees under your supervision.

Understanding How to Set Up Insights Dashboards for Remote Worker Analytics

Before administrators or managers can access the visualizations for remote worker data, the following steps should be performed:

1. Deploy these indexes for the following users:

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Deploy/Delete Object**)

   - Administrator:

     HC_HR_RWORK_INDEX (Remote Worker Index): shows the administrator the current remote work request details as of today.

     HC_HR_RWORKHIS_ADM_IDX (Remote Work History Index Admin): shows the administrator the historical remote work request details up through today.

     HC_HR_RW_EMP_VACC_INDEX (Remote Worker Vaccination): allows the administrator to view the vaccination status of employees, further organized by remote work status.

   - Manager:

     HC_HR_RWORK_MGR_IDX (Manager Remote Worker): shows the current remote work request details as of today for the manager's direct and indirect reports.

     HC_HR_RWHIS_MGR_IDX (Remote Work History for Managers): shows the historical remote work request details up through today for the manager's direct and indirect reports.

2. Build the following search indexes:

   (**PeopleTools** > **Search Framework** > **Search Admin Activity Guide** > **Administration** > **Schedule Search Index**)

   - Administrator:

     HC_HR_RWORK_INDEX

     HC_HR_RWORKHIS_ADM_IDX

HC_HR_RW_EMP_VACC_INDEX

- Manager:

  HC_HR_RWORK_MGR_IDX

  HC_HR_RWHIS_MGR_IDX

3. Deploy the following tiles and dashboards:

   (**PeopleTools** > **Search Framework** > **Administration** > **Deploy Insights Dashboards**)

   - Administrator: *Remote Worker Insight* tile and *Remote Worker Insights Dashboard*.
   - Manager: *Remote Worker Distribution* tile and *Remote Worker Dashboard*.

   Note: The full index must be run before the dashboard can be deployed.

4. Assign roles to the following users to grant them access to view remote worker visualization tiles and dashboards:

   - Administrator: *Fluid Remote Worker Admin* role for the Remote Worker Insight tile and dashboard.
   - Manager: *Fluid Remote Worker Manager* role for the Remote Worker Dashboard tile and dashboard.

Real Time Indexes for Remote Worker Visualizations

The remote worker search indexes to view remote worker information support real time indexing (RTI) with a minimum PeopleTools version. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

Search Definition	***Minimum PeopleTools Release***	***Usage***
Remote Work HC_HR_RWORK_INDEX	8.59.10	Allows administrators to view current remote information.
Remote Worker Vaccination HC_HR_RW_EMP_VACC_INDEX	8.59.10	Allows administrators to view the vaccination status of employees, grouped by remote work status.
Remote Work History HC_HR_RWORKHIS_ADM_IDX	8.59.10	Allows administrators to view historical information.

Search Definition	***Minimum PeopleTools Release***	***Usage***
Manager Remote Worker HC_HR_RWORK_MGR_IDX	8.59.10	Allows managers to view current information for their employees.
Manager Remote Work History HC_HR_RWHIS_MGR_IDX	8.59.10	Allows managers to view historical information for their employees.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, “Administering Real Time Indexing."

Related Links

“Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)

“Understanding Real Time Indexing in HCM” (Application Fundamentals)

Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology,* “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Search and Filter Options:

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Field of Control	***Definition***
 (See saved queries) icon	Click to save the current query text and filters that you want to reuse in the future, or select an existing query to use to update the visualizations.
Search field	Enter a query to filter data, if applicable.

Field of Control	***Definition***
(Change all filters) and **+ Add filter** icon and link	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the **+ Add filter** link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the **Remote Worker Details** grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the **+ Add filter** link for reference. For example, when you click a chart item, the filter is automatically added to your filters list. When you click a chart item, such as the horizontal bar item for *Calgary Branch* for employees working at the workplace, the system will prompt you to add the *Remote Location Type: Workplace* and *Remote Location Type: Calgary Branch* filters since this item consists of more than one filter. Click the **Change all filters** icon for a list of actions that can be performed on *all* filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.
(Calendar) or **Show dates** icon and link	Click to select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, *This week*, or *Last 30 days*, click the **Show dates** link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is *Year to date*. Clicking the **Show dates** link displays ~ *10 months ago —> now*, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.

Field of Control	*Definition*
Regulatory Region, **Business Unit**, **Department**, **Job Family**, **Remote Worker Type**, and **Remote Location** fields	Select to filter remote work data by regulatory region, followed by business unit, then by department, then so on. You must select a regulatory region before selecting a business unit. A business unit must be specified before you can filter data by department, and so on. **Note:** Managers have two additional filters: **Supervisor** and **Employee**. See Remote Worker Dashboard (for Managers) for more information.

Visualization Options:

When you pause over a visualization, the **Options** and **Legend** icons (if applicable) are displayed on the top right and bottom left corners respectively. Use them to inspect the chart or table and view the details of that visualization and toggle the legend display.

Field or Control	*Definition*
 (Options) icon	Click the Options icon to select one of these options: • *Inspect*: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • *Maximize panel* or *Minimize*: Select *Maximize panel* to have the page display this visualization in full screen. Select *Minimize* to return to the dashboard and display all visualizations.
 (Toggle legend) icon	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

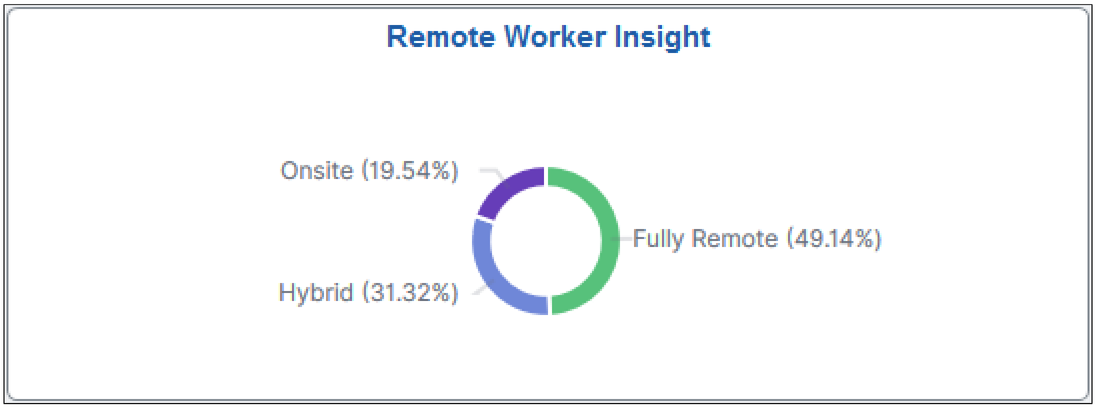
Remote Worker Insight Tile (for Administrators)

Administrators use the Remote Worker Insight tile to access and view HR remote workforce Insights analytics.

Navigation:

The Remote Workforce Insight tile is located on the “Workforce Administrator Homepage” (Application Fundamentals).

This example illustrates the Remote Worker Insight tile.



The Remote Worker Insight tile displays the **Remote Worker Distribution Percentage** visualization, which gives a snapshot of the distribution of employees working onsite, remote, or a hybrid of the two.

Click this tile to access the Remote Worker Insights Dashboard (for Administrators) and analyze visualizations related to remote worker information for the organization.

Remote Worker Insights Dashboard (for Administrators)

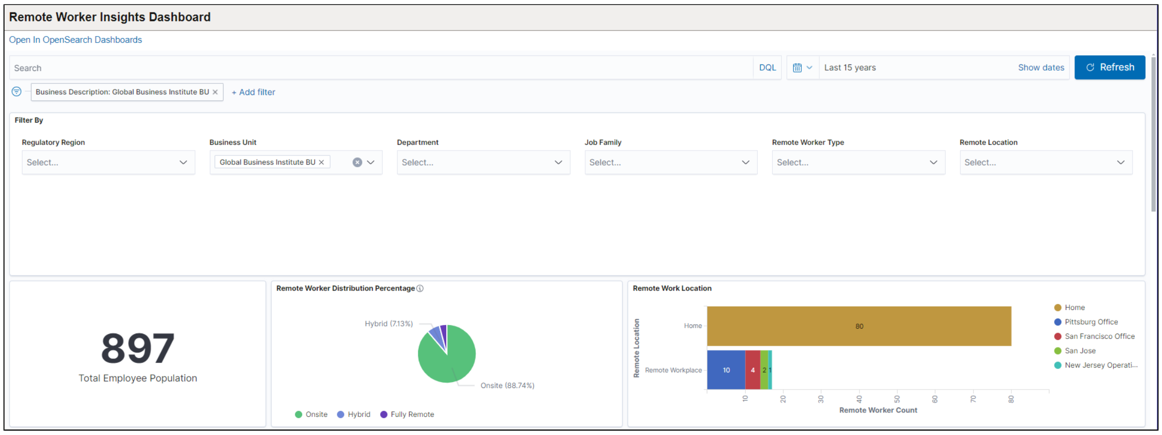
Administrators use the Remote Worker Insights dashboard to review and analyze remote worker data using visualizations.

Navigation:

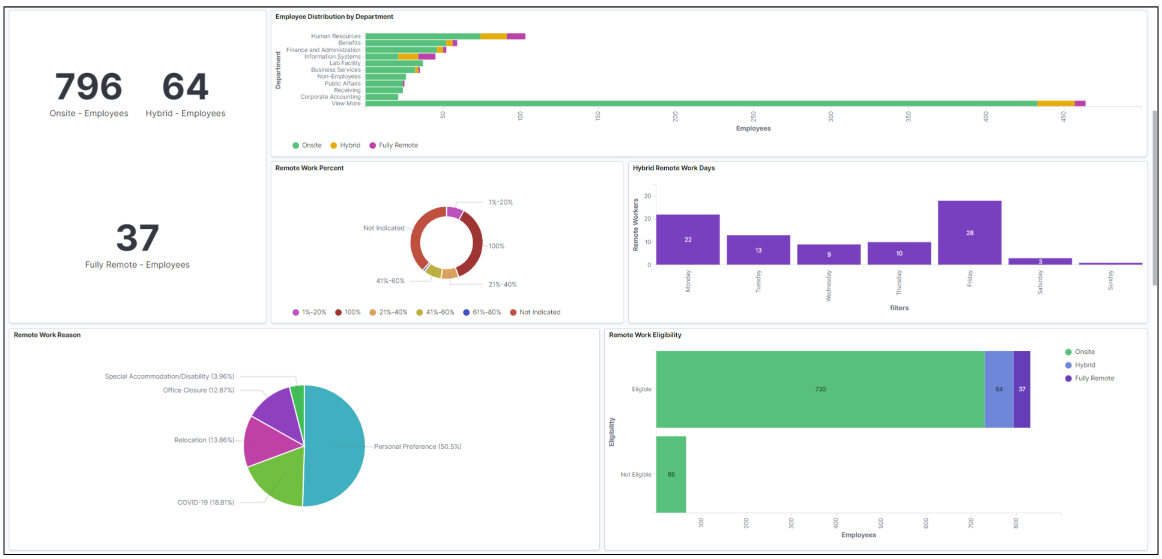
Workforce Administrator home page > **Remote Worker Insight tile**

Note: You must be assigned the *Fluid Remote Worker Admin* role to view this dashboard.

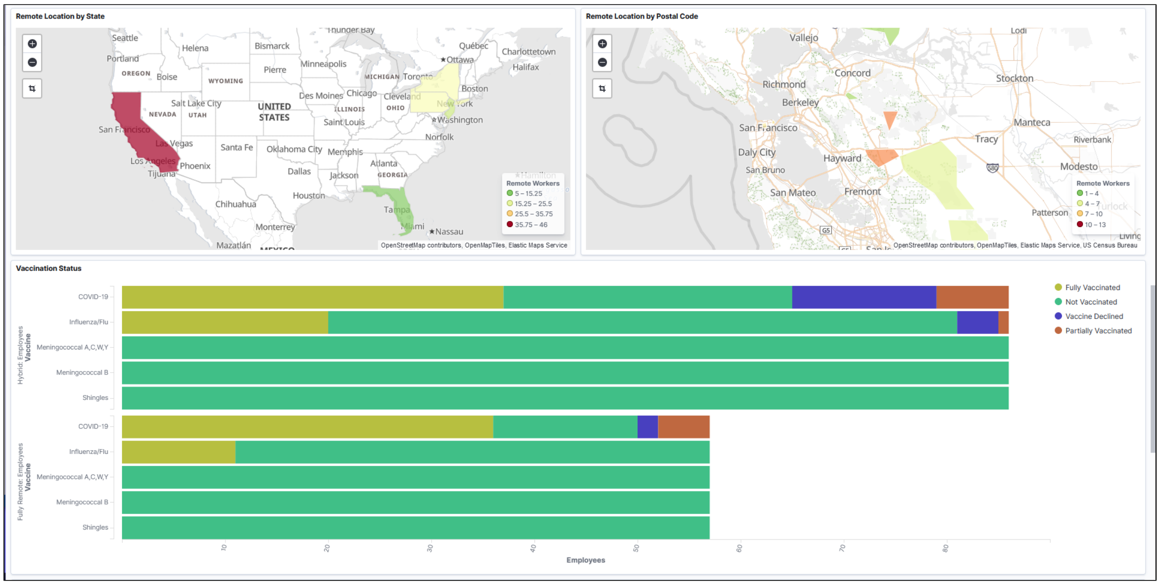
This example illustrates the fields and controls on the Remote Worker Insights Dashboard (1 of 4).



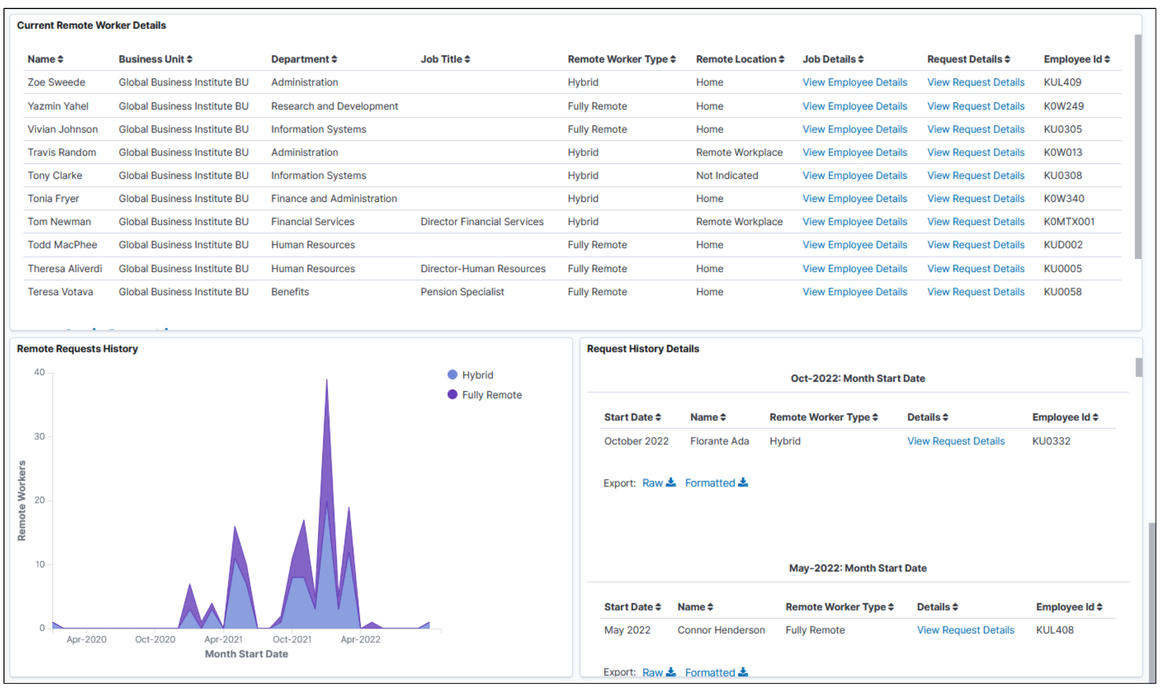
This example illustrates the fields and controls on the Remote Worker Insights Dashboard (2 of 4).



This example illustrates the fields and controls on the Remote Worker Insights Dashboard (3 of 4).



This example illustrates the fields and controls on the Remote Worker Insights Dashboard (4 of 4).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

Filter By

For a list of filters available for the administrator Remote Worker Insights dashboard, see the Common Elements and Controls section in this documentation.

Remote Worker Visualizations (for Current Data)

The Remote Worker Insights Dashboard provides you with the following collection of interactive visualizations to view and analyze current remote worker data for the whole organization.

Note: The dashboard uses role-level security to display permitted data to the user.

Important! For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

Visualization	***Description***
Total Employee Population number count	This panel displays a count of all employees that meet the filter criteria.
Remote Worker Distribution Percentage pie chart	This visualization displays a graphical representation of the number of workers that are fully remote, in the office, and those working a hybrid of the two.
Remote Work Location horizontal bar chart	This visualization displays the locations of workers that are fully or hybrid remote.
Remote worker number counts by type: • **Fully Remote - Employees** • **Hybrid - Employees** • **Onsite - Employees**	This panel displays the number counts for the types of remote workers you have in the organization according to your filter criteria: those who are fully remote, those who work a hybrid of both remote and in the office, and those working fully onsite at the office.
Remote Distribution by Department horizontal bar chart	This visualization displays all employee counts by department and the remote work type.
Remote Work Percent donut chart visualization	This displays the percentages of time employees are scheduled to work remote.
Hybrid Remote Work Days vertical bar chart	This visualization displays the days hybrid remote employees are anticipated to work remotely.
Remote Work Reason pie chart	This shows the top five reasons employees are working remote.

Visualization	***Description***
Remote Work Eligibility horizontal bar chart	This visualization is beneficial for those tracking work eligibility by job code, position, or remote work region. Displays the number of staff that are eligible and ineligible to work remote based on the settings for either their position, job, or remote work region. To be eligible for remote work, at least one of the following must be selected: • The **Available for Telework** check box on the “Job Code Profile Page” (Application Fundamentals) for the employee's job code. • The **Available for Telework** check box on the (Classic) “Position Data - Specific Information Page” (PeopleSoft Human Resources Manage Positions) or (Fluid) “Manage/Create Position - Position Data Page” (PeopleSoft Human Resources Manage Positions) for the employee's position. • The **Override Position and Job Eligibility** option is enabled for the employee's region on the Remote Worker Configuration Page. **Note:** If these options are deselected in all three locations, the employee will not show as eligible for remote work. Since these employee do not work remote, the grid will not list ineligible employees. The analytic extrapolates the number of ineligible workers by subtracting the eligible employees from the total number of employees.
Remote Location by State map	(USA) Displays the remote employee working locations based on the state associated with the **Remote Location** address entered on the request. See Remote Worker Request - Request Details Page.
Remote Location by Postal Code map	(USA) Displays the remote employee working locations by zip code. This information comes from the address information associated with the **Remote Location** entered on the request. See Remote Worker Request - Request Details Page. **Note:** The postal code visualization is currently not available with the OpenSearch implementation.

Visualization	***Description***
Vaccination Status	This stacked horizontal bar chart visualization displays the vaccinations by remote worker status (Onsite, Fully Remote, and Hybrid). Each remote worker type displays the vaccination statuses by vaccine (Not Vaccinated, Fully Vaccinated, Partially Vaccinated, and Vaccine Declined).

Current Remote Worker Details Grid

This grid lists the employees, which are presented in visualizations, in a tabular format for information as of today.

Field or Control	***Description***
 (Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
 (Filter for value) and  (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter. For example, if you click to filter for a **Department** value, all visualizations will refresh to show employees for that department. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filtering process. For example, if you click to filter out the *HRMS Division* value in the **Department** column, visualizations will refresh to show information for all departments except *HRMS Division*. Filters can be removed from the Filters area at the top of the page.
View Employee Details and **View Request Details** links	Click to access the corresponding information in a new browser window or tab. **Note:** If you update the information in the Remote Worker Request component, you need to rebuild the index for the changes to be reflected in these analytics. However, changes from the component will be updated in the index in real time when RTI is enabled. See also, “Understanding Real Time Indexing in HCM” (Application Fundamentals).

Field or Control	*Description*
Export links: • **Raw** • **Formatted**	Click to export data from the grid into a .csv file format.

Historical Remote Worker Visualization and Grid

Visualization	*Description*
Remote Requests History graph	Displays remote work trends by month comparing fully remote and hybrid remote workers.
Request History Details table grid	Lists remote worker information by month. For a list of elements and controls in the details grid, see the **Current Remote Worker Details Grid** subtopic that precedes this subtopic.

Related Links

(Fluid) Managing Remote Worker Information

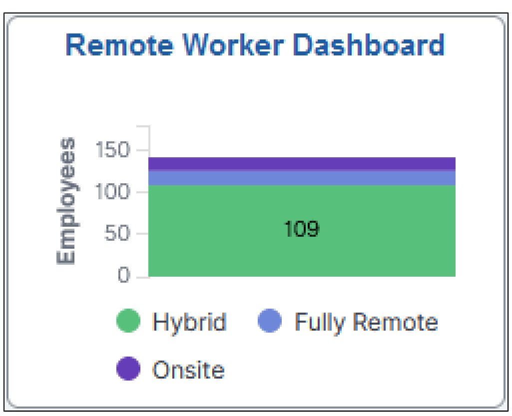
Remote Worker Dashboard Tile (for Managers)

Managers use the Remote Worker Dashboard tile to access and view HR remote workforce analytics for employees under their supervision.

Navigation:

The Remote Workforce Dashboard tile is located on the "Manager Self Service Homepage" (Application Fundamentals).

This example illustrates the Remote Worker Dashboard tile.



The Remote Worker Dashboard tile displays the **Remote Worker Distribution Type** visualization, which gives a snapshot of the distribution of employees working onsite, remote, or a hybrid of the two.

Click this tile to access the Remote Worker Dashboard (for Managers) and analyze interactive visualizations related to remote worker information for direct and indirect reports.

Remote Worker Dashboard (for Managers)

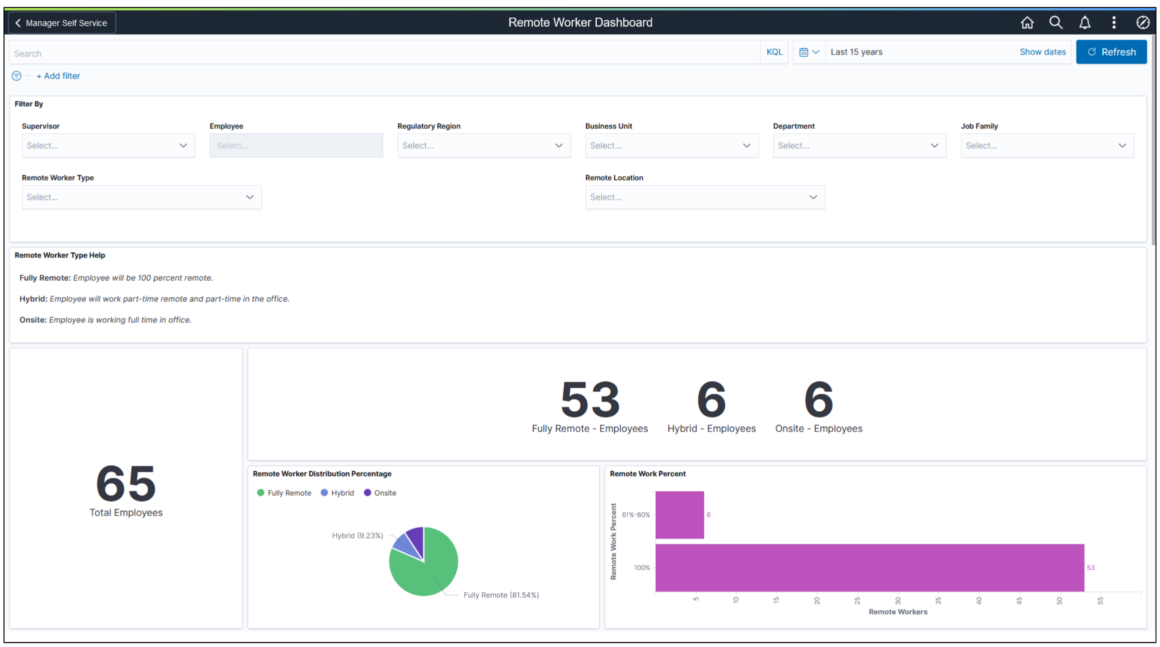
Managers use the Remote Worker Dashboard to review and analyze remote worker data using visualizations for employees under their supervision.

Navigation:

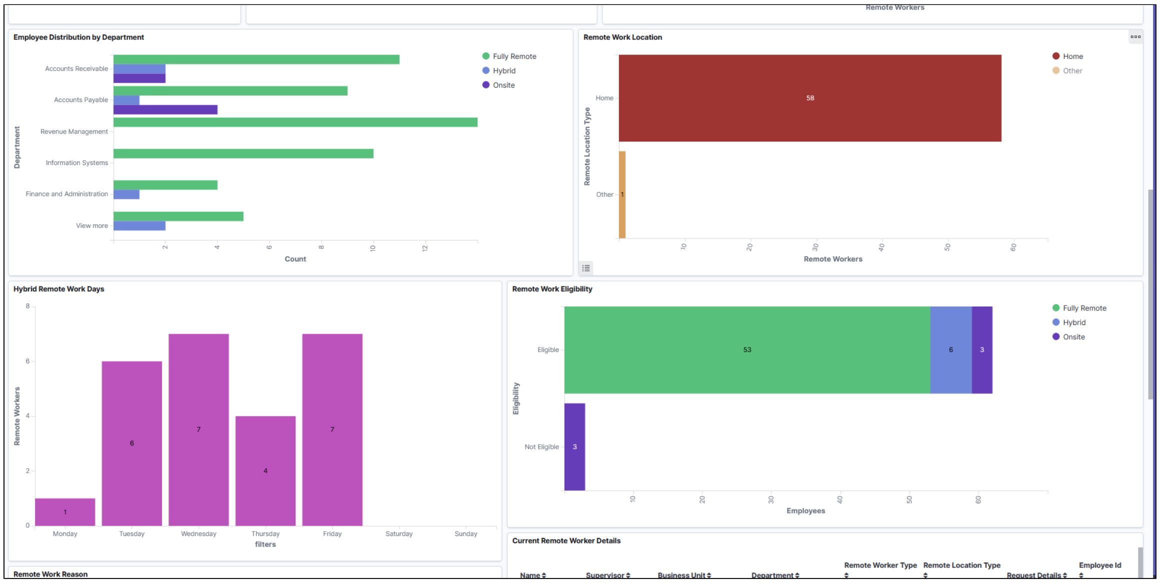
Manager Self Service home page > **Remote Worker Dashboard tile**

Note: You must be assigned the *Fluid Remote Worker Manager* role to view this dashboard.

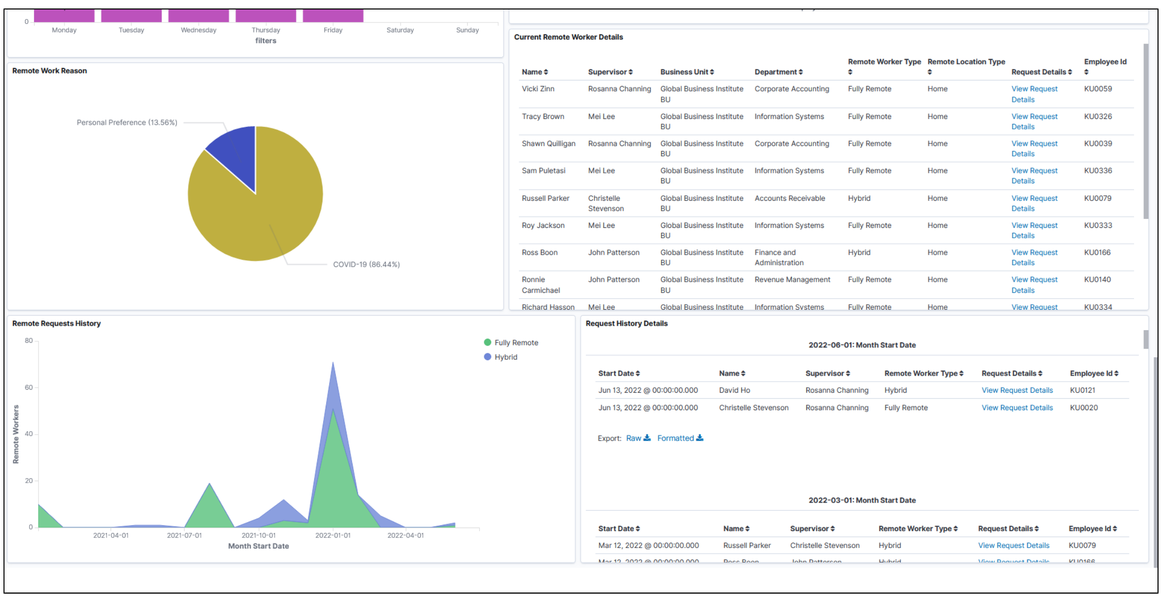
This example illustrates the fields and controls on the Remote Worker Dashboard (1 of 3).



This example illustrates the fields and controls on the Remote Worker Dashboard (2 of 3).



This example illustrates the fields and controls on the Remote Worker Dashboard (3 of 3).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

Filter By

These filters are specific to the manager Remote Worker Dashboard.

Field or Control	***Description***
Supervisor	Select one or several supervisors from a list of managers, including yourself, under your supervision. This allows you to view data for the employees that report to the manager(s) you have specified.
Employee	Select one or more employees from a list of people that report to the supervisor or set of supervisors your selected in the **Supervisor** field. This will filter the view of the graphics to show data for just those individuals.

For a list of other filters, see the Common Elements and Controls section in this documentation.

Remote Worker Visualizations (for Current Data)

The Remote Worker Dashboard provides you with the following collection of visualizations to view and analyze remote worker data as a manager.

Note: The dashboard uses role-level security to display permitted data to the user.

Important! For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.

Visualization	***Description***
Total Employees number count	This panel displays a count of all employees under the manager's supervision (direct and indirect reports) that meet the filter criteria.
Remote worker number counts by type: • **Fully Remote - Employees** • **Hybrid - Employees** • **Onsite - Employees**	This panel displays the number counts for the types of workers under a manager's supervision in regards to the filter criteria. It displays those who are fully remote, those who work a hybrid of both remote and in the office, and those working fully onsite at the office.
Remote Worker Distribution Percentage pie chart	This visualization displays a graphical representation of the manager's subordinates that are fully remote, in the office, and working a hybrid of the two.
Remote Work Percent horizontal bar chart	This visualization displays the number of employees under the manager by the percentage of time they are working remote.

Visualization	*Description*
Employee Distribution by Department horizontal bar chart	This visualization displays employees under the manager's supervision by department and remote work type.
Remote Work Location horizontal bar chart	This visualization displays the work locations of workers that are fully or hybrid remote.
Hybrid Remote Work Days vertical bar chart	This visualization displays the days hybrid remote employees are anticipated to work remotely.
Remote Work Eligibility horizontal bar chart	This visualization is beneficial for those tracking work eligibility by job code, position, or remote work region. Displays the number of staff under the manager that are eligibility and ineligible to work remote based on the settings for either their position, job, or remote work region. To be eligible for remote work, at least one of the following must be selected: • The **Available for Telework** check box on the “Job Code Profile Page” (Application Fundamentals) for the employee's job code. • The **Available for Telework** check box on the (Classic) “Position Data - Specific Information Page” (PeopleSoft Human Resources Manage Positions) or (Fluid) “Manage/ Create Position - Position Data Page” (PeopleSoft Human Resources Manage Positions) for the employee's position. • The **Override Position and Job Eligibility** option is enabled for the employee's region on the Remote Worker Configuration Page. **Note:** If these options are deselected in all three locations, the employee will not show as eligible for remote work. Since these employee do not work remote, the grid will not list ineligible employees. The analytic extrapolates the number of ineligible workers by subtracting the eligible employees from the total number of employees.
Remote Work Reason pie chart	This shows the top five reasons employees are working remote.

Current Remote Worker Details Grid

This grid displays a detailed grid of employee's under the manger's supervision that meet the visualization specifications.

Field or Control	Description
(Sort column heading) icon	Click a column heading to sort grid rows by the column value in ascending or descending order.
(Filter for value) and (Filter out value) icons	These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid and provide a quick way to add filters to the analytics. Click the **Filter for value** (+ magnify glass) icon to add the shown field value as a filter to all visualizations. For example, if you click to filter for a **Department** value, all visualizations will refresh to show employees for that department. Click the **Filter out value** (- magnify glass) icon to remove the shown field value from the filter process for all visualizations. For example, if you click to filter out the *Human Resources* value in the **Department** column, visualizations will refresh to show information for all departments except *Human Resources*. Filters can be removed from the Filters area at the top of the page.
Request Details column heading	Click the *View Request Details* link to access the remote request details in a new browser window or tab. **Note:** If you update the information in the Remote Worker Request component, you need to rebuild the index for the changes to be reflected in these analytics. However, changes from the component will be updated in the index in real time when RTI is enabled. See also, “Understanding Real Time Indexing in HCM” (Application Fundamentals).
Export links: • **Raw** • **Formatted**	Click to export data from the grid into a .csv file format.

Historical Remote Worker Visualization and Grid

Visualization	Description
Remote Requests History graph	Displays remote work trends by month comparing fully remote and hybrid remote workers.

Visualization	*Description*
Request History Details table grids	Lists remote worker information by month. For a list of elements and controls in the details grid, see the **Current Remote Worker Details Grid** subtopic that precedes this subtopic.

Related Links

(Fluid) Managing Remote Worker Information

Chapter 25

Viewing the Org Chart Viewer and Company Directory

Using the Org Chart Viewer

Use the Org Chart Viewer component to view employee personal and job data within the context of your organization's various hierarchical reporting structures.

These topics provide an overview of the Org Chart Viewer, folder tabs, and page functionality and discuss how to use the Org Chart Viewer.

Pages Used to View the Org Chart Viewer

Page Name	*Definition Name*	*Usage*
Org Chart Viewer - Preferences Page	HRCD_USER_PREF_SEC	Define Org Chart Viewer personal preferences to determine how you want the startup page content or layout to appear. The start page content is specific to the Org Chart Viewer: Company Directory page.
Org Chart Viewer- Search for People Page (See Searching for a Person in the Org Chart Viewer)	HRCD_SEARCH	Search for a person in the Org Chart Viewer by entering any number of search criteria to locate an individual in the corresponding Org Chart Viewer folder tab. For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports. Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header. Searches from within an org view type folder tab will perform a search within that folder only.

Page Name	***Definition Name***	***Usage***
Company Directory: Org Chart Page	HRCD_MAIN	View an organizational chart for a person as a three-tiered chart with the person in the focus node in the middle level. Or, you can view a hierarchical list of people with the retrieved person's record at the top of the list.
Company Directory:Profile Page	HRCD_MAIN	View a person's profile information from the Company Directory folder, such as contact information, HR details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile.
Direct-Line Reports: Org Chart Page	HRCD_MAIN	View an organizational chart with you as the top node and your direct reports below. Or, you can view a hierarchical list of your direct-line reports with you at the second level and your manager at the top. When you search for a specific person, the page will display that person's manager at the top with their direct-line reports below.
Direct-Line Reports:Profile Page	HRCD_MAIN	View a person's profile information from the Direct-Line Reports folder for you or one of your direct-line reports, such as contact information, company details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile.
<matrix team name>: Org Chart Page	HRCD_MAIN	View a tiered organizational chart containing the matrix team's members.
<matrix team name>: Profile Page	HRCD_MAIN	View a matrix team member's profile information, such as contact information, HR details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile.
Org Chart Viewer - Teams Page	HRCD_LIST_SEC	View all the members of a matrix team as an Hgrid list, with matrix leads appearing as expandable rows.

Page Name	***Definition Name***	***Usage***
Org Chart Viewer - Update Photo Page	HRCD_USER_PICS_SEC	Select photo display options, such as no photo, upload your own photo, or use the HR photo that is on file, for your personal profile. The photo selected here is used for all the org chart view types.
Edit Additional Contacts Page	HRCD_USER_CNTC_SEC	Add additional contact information to your personal profile, such as home phone number, mobile, IM address, or email addresses. The data you enter here is the same across all org view type Profile pages.
Edit My Profile Links Page	HRCD_USER_LINK_SEC	Add web site links to your own personal profile. The data you enter here is the same across all org view type Profile pages.
Edit Personal Statement Page	HRCD_USER_TEXT_SEC	Include a personal statement or comments using a rich text formatting to your own personal profile. The data you enter here is the same across all org view type Profile pages.

Understanding the Org Chart Viewer, Folder Tabs, and Page Functionality

The Org Chart Viewer enables your employees and managers to search for people across the organization, to see a visual representation of the organization based on your defined hierarchical structures, and enable actions from the visualization. Users are able to collaborate with co-workers by selecting the communication methods available within the organization including email, telephone options, instant messaging, links to social networks, and a free form text field to add additional personalized information.

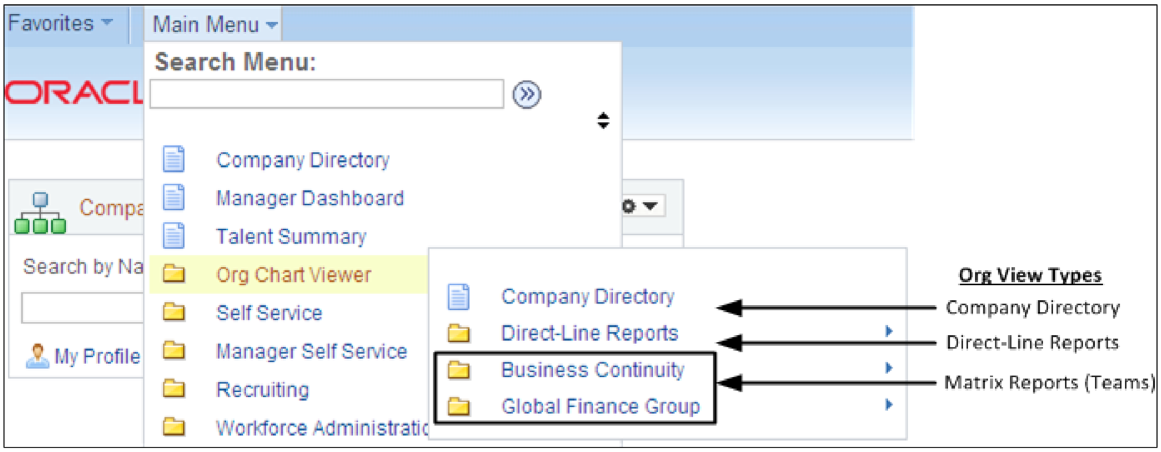
The Org Chart Viewer pages present the user with different views of the organization. When enabled and granted access, users can view the hierarchical structure of their organizations through the Company Directory folder or tab, view their direct-line structure through the Direct-Line Reports folder or tab, or view matrix teams through the Org Chart Viewer matrix folders or tabs or **Teams** menu links.

See Understanding Org Chart Viewer and Company Directory Features and Functionality.

Access the Org Chart Viewer component by selecting an org view type folder directly from the root menu.

Folder Tabs to Represent Org View Types

When you access the Org Chart Viewer in classic mode, you may be presented with the option to select from three different types of org view types: Company Directory, Direct-Line Reports (if you are a manager with direct reports), and matrix teams, otherwise known as dotted-line reports (one for each team with which you are associated).



Note: As of PeopleTools 8.55, the menu navigation structure is no longer available. Select **Company Directory** from the Nav Bar Navigator and it will take you to the Org Chart Viewer, if Fluid Company Directory is not implemented.

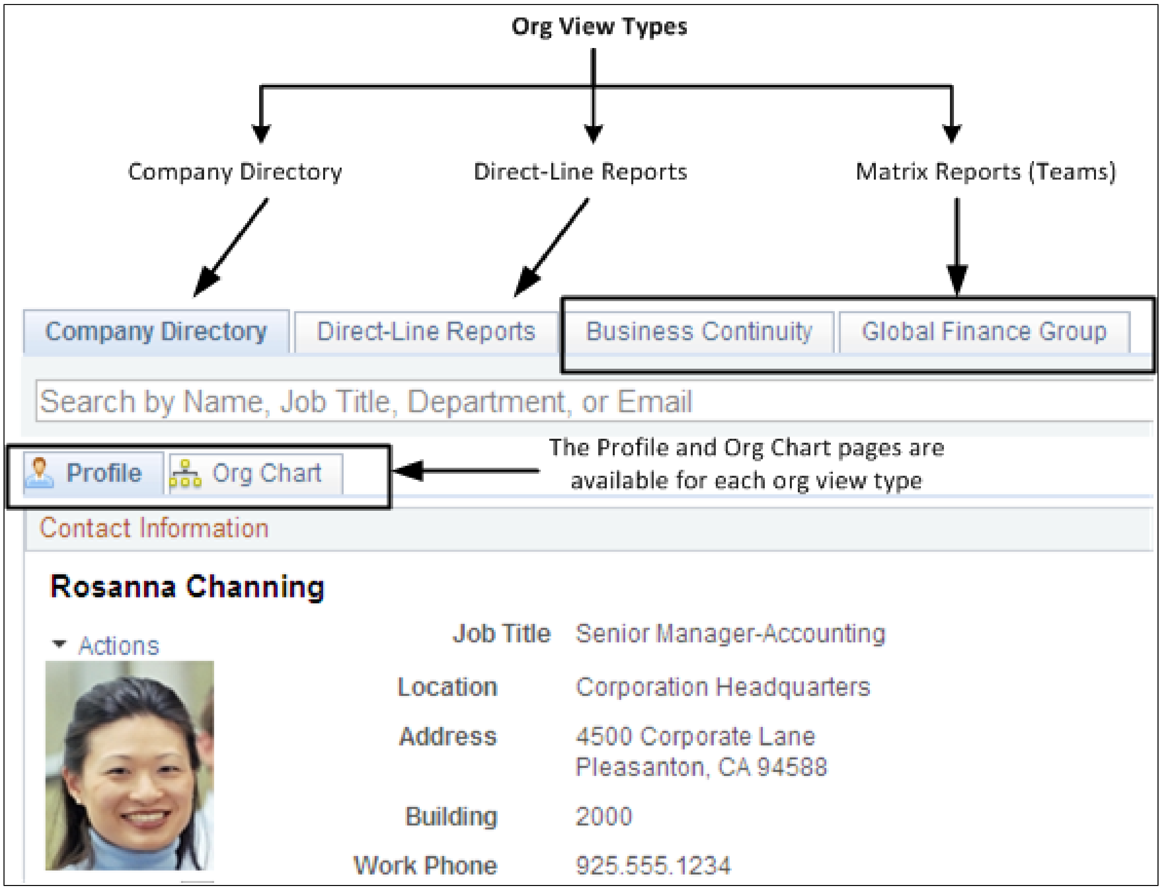
The menu navigation structure provides a quick overview of the reporting structures for each organizational viewer format. The menu navigation shows the following folder order structure when all folders are enabled and a user has access:

Org View Type ***Folder***	***Description***
Company Directory	The first menu folder displays the Company Directory. The Company Directory folder tab appears as the first tab in the Org Chart Viewer tab folders. Depending upon your security access and reporting structure, this may be the only org view type for which you have access. The Org Chart page reflects the reporting structure of your organization and you can perform searches for anyone in the Company Directory. When you access the Company Directory folder from one of the other Org Chart Viewer folders, the page will display the person defined in the **Start Page Content** section of the Org Chart Viewer - Preferences Page as the focus root node.

Org View Type ***Folder***	***Description***
Direct-Line Reports	If applicable, the next folder in the menu structure shows the Direct-Line Reports folder for managers. The Direct-Line Reports folder tab typically appears as the second tab in the Org Chart Viewer tab folders. If you do not have access to this page or do not have direct reports, this folder tab will not be available to you. The Org Chart page reflects the reporting structure of your direct and indirect reports. You can perform searches for any employees that report to you. When you access the Direct-Line Reports folder from one of the other Org Chart Viewer folders, the page will display the logged in user’s profile data or in the focus node as the manager, by default. If you have access to the Manager Dashboard page, you can also access that page from this folder tab by clicking the Manager Dashboard link in the Search bar.

Org View Type ***Folder***	***Description***
Matrix Reports (teams)	The remaining folders, if applicable, represent the Matrix Reports (teams) folders and are identified by the team name. You can view matrix teams through these various methods: • Matrix reports folder tabs at the top of the Org Chart Viewer component A matrix report folder tab, which reflects the name of the matrix team, appears at the top of the Org Chart Viewer component and is available for team owners and members, depending upon how the team matrix was set up. • Teams page Teams that are made public and viewable for org view types will be shown in the Teams fields for individuals associated with a team. You can view a list of team members by selecting the matrix team link for an individual on the Profile or by selecting the matrix team from the Teams drop-down list on the org chart nodes. See Org Chart Viewer - Teams Page. The matrix team pages reflect the reporting structure of each team and you can perform searches for anyone in that team. When you access the matrix team folders from one of the other Org Chart Viewer folders, the page will display the root person of the team in the focus node or profile page by default. See Matrix Team Page.

After you have accessed the Org Chart Viewer component, you can use the folder tabs to access the different org view types, as shown in this example.



There are also elements within the Org Chart Viewer common to all org view types. These include:

- At the top of Org Chart Viewer users will have access to set personal preferences.
- A search feature that enables users to look for individuals within the org view type tab folder from which the search was initiated.
- Each org view type folder consists of a Profile and an Org Chart page.
    - The Profile page enables users to view profile details about a person, such as job specifics, and provides access to additional contact information.
    - The Org Chart page shows the reporting structure specific to the org view type folder you have accessed. You can view this information in a chart or list format.
- When the appropriate functionality is enabled, users can initiate IM chats and email communication directly from the Org Chart Viewer pages.
- When the appropriate functionality is enabled, users can export Org Chart Viewer details to Excel or Visio.

Pages Within Each Org View Type

Each org view type folder contains two page tabs:

Page Within the Org Chart Viewer Folder	***Description***
Org Chart Viewer	View a person within the context of the reporting structure for the org view type you are accessing. It displays a three-tiered graphical representation. The chart focuses on a person and where he or she fits within the reporting structure or that org view type.
Profile Page	Displays up to five group boxes: two company related group boxes on the left side and three personalized group boxes on the right. The Profile tab of the page provides additional information about a person, such as his or her job details; links to other people with whom he or she is associated, such as direct reports, peers, and the manager; as well as personalized group boxes, which enable the user to enter additional contact details, personal links, and free from text. Information the user enters on his or her own Profile page will appear on the Profile page of each org view type folder, it is not org view type specific.

Performing Personal Updates Through Self Service Transactions

When an individual views his or her content, whether from the Org Chart tab or the Profile tab within the Org Chart Viewer pages, he or she can be granted the ability to access HCM related self service transactions using the Actions menu link. The manager can also be granted the ability to access HCM related manager self service transactions using the **Actions** menu link for his or her subordinates.

For a list of delivered Self Service and Manager Self Service transactions, see the “Setting Up the Administer Workforce Business Process” topic in this book.

See Understanding Related Actions and Self Service Transactions.

See “(Classic) Reviewing and Updating Personal Information” (PeopleSoft eProfile).

See “Understanding the Management of Direct Reports” (PeopleSoft eProfile Manager Desktop).

Org Chart Viewer - Preferences Page

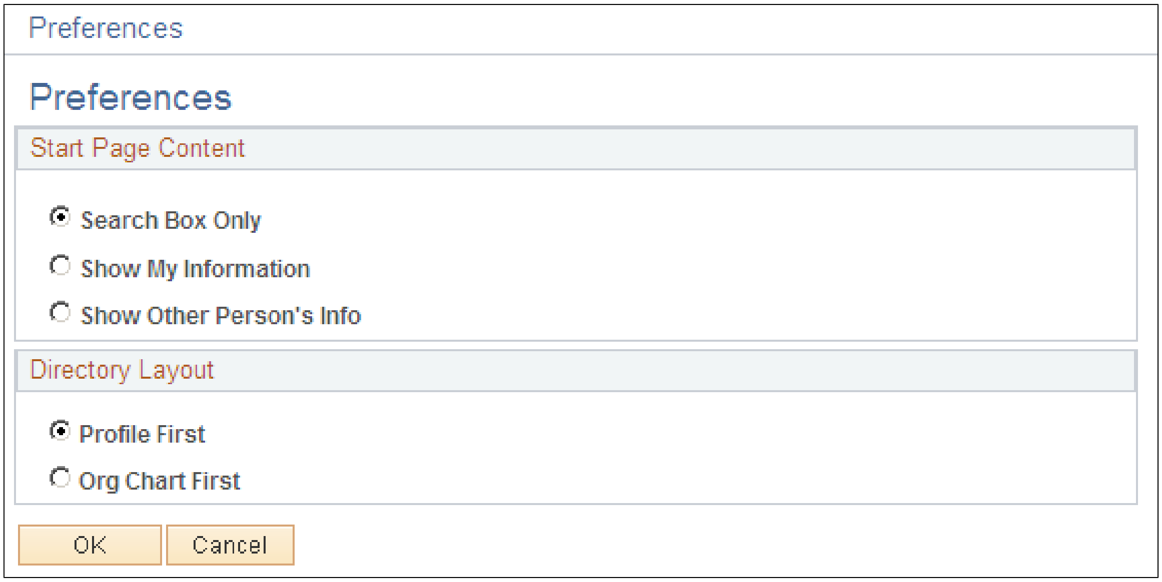
Use the Org Chart Viewer - Preferences page (HRCD_USER_PREF_SEC) to define Org Chart Viewer personal preferences to determine how you want the startup page content or layout to appear.

The start page content is specific to the Org Chart Viewer: Company Directory page.

Navigation:

Click the **Preferences** link at the top of any of the Org Chart Viewer pages.

This example illustrates the fields and controls on the Org Chart Viewer - Preferences page. You can find definitions for the fields and controls later on this page.



Start Page Content

This group box enables you to determine how the start page of the Company Directory folder tab should display for yourself as a user.

Note: This group box is specific to the Company Directory tab and does not display when you access the **Preferences** link from the Direct-Line Reports or matrix team folder tabs.

Field or Control	***Description***
Search Box Only	Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system.
Show My Information	Select this option to have the system display your information as the user accessing the page. Your information will appear as the focus of the Org Chart node or on the Profile page, depending on the layout setting you have selected. The search field is also available at the top of the page when you select this option.

Field or Control	***Description***
Show Other Person's Info	Select this option to enter a person's name in the **Enter a Name** field. This person's information will appear as the initial focus of the Org Chart node or Profile page, depending on the layout setting you have selected. The search field is also available at the top of the page when you select this option.
Enter a Name	Enter the name of the person who should appear as the focus when you first access the Company Directory page. For example, you may want to enter the name of a person you contact frequently, such as your HR or accounting representative. This field is available only when **Show Other Person's Info** is selected.

Directory Layout

This group box enables you to select which page within the Org Chart Viewer folder tabs the system should display first: the Org Chart or Profile page. This group box applies to all the Org Chart Viewer tabs and changing the layout style on one folder tab will change it for all of them.

Field or Control	***Description***
Profile First	Select this option to have the system display the Profile page for the focus person of the page. The Profile page displays detailed information about the person, such as contact information, HR details, and personalized links and information.
Org Chart First	Select this option to have the system display the Org Chart page for the focus person of the page. The Org Chart page displays a three-leveled graphical representation of this person's reporting structure, with the focus person in the middle level.

Searching for a Person in the Org Chart Viewer

The Org Chart Viewer feature enables you to search and retrieve people through various methods. You can use the basic search field, enter multiple search criteria through an advanced search page, use SmartNavigation that appears in the navigation header as breadcrumbs and fly-out menus, or select the links of other names on the Org Chart or Profile pages of the Org Chart Viewer component.

The Org Chart Viewer will perform a search for an individual based on the org view type folder tab you are currently viewing. For example, if you have accessed a matrix team folder tab from within the Org

Chart Viewer, the system will search for that person within that team. If the person does not exist in that matrix team, the search will return no results.

These topics discuss:

- The search for people: single field search.
- The search for people: advanced search page.
- The SmartNavigation menu structure.
- The search for people with multiple jobs.

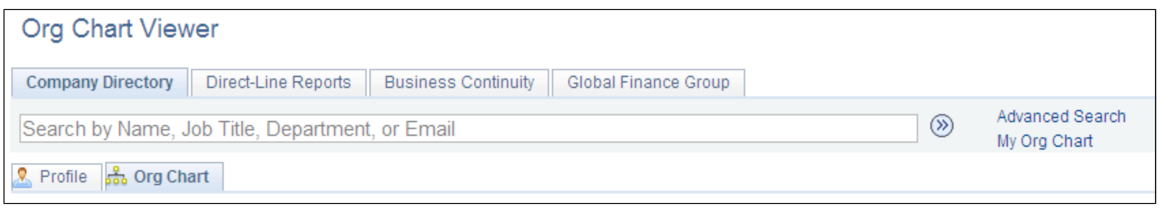
The Search for People: Single Field Search

Access the search header of any Org Chart Viewer page.

Note: Searches from within an org view type folder tab will perform a search within that folder only.

For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports. Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header.

This example illustrates the fields and controls on the Org Chart Viewer search header that uses a single field search. You can find definitions for the fields and controls later on this page.



The header for each org view type folder will display this search field and enables you to perform a single field search for a person. When a user accesses the Company Directory org view type folder tab, only the header (with the search field) will display on the page when the **Search Box Only** option is selected for the user's personal preferences.

Field or Control	*Description*
Search by Name, Job Title, Department, or Email	Enter the name, job title, department, or email for the person that you want to retrieve. Searches are not case sensitive and will perform partial name searches. **Note:** Searches are specific to the org view type folder you have selected.
Advanced Search	Click this link to access the Advanced Search page where you can enter multiple search criteria to narrow a search.

Field or Control	***Description***
My Org Chart	Click this link to have the system display your information as the focus on the Org Chart page. This link appears if the layout for the start page is set to show the Org Chart page first or when you are on the Org Chart page.
My Profile	Click this link to have the system display your information as the focus on the Profile page. This link appears if the layout for the start page is set to show the Profile page first or when you are on the Profile page.
Preferences	Click this link to access the Preferences page and configure personal start up page and layout preferences. See Org Chart Viewer - Preferences Page.
(Export to CSV icon button)	Select the button in the page header to export profile or org chart information to a CSV file. Exporting must be enabled when setting up the org view types. Export types are: *CSV file for Excel* *CSV file for Visio:* The CSV file is a datasource that contains the hierarchy data. You will need to import this file from Visio manually.

The Search for People: Advanced Search Page

Use the Org Chart Viewer- Search for People page (HRCD_SEARCH) to search for a person in the Org Chart Viewer by entering any number of search criteria to locate an individual in the corresponding Org Chart Viewer folder tab.

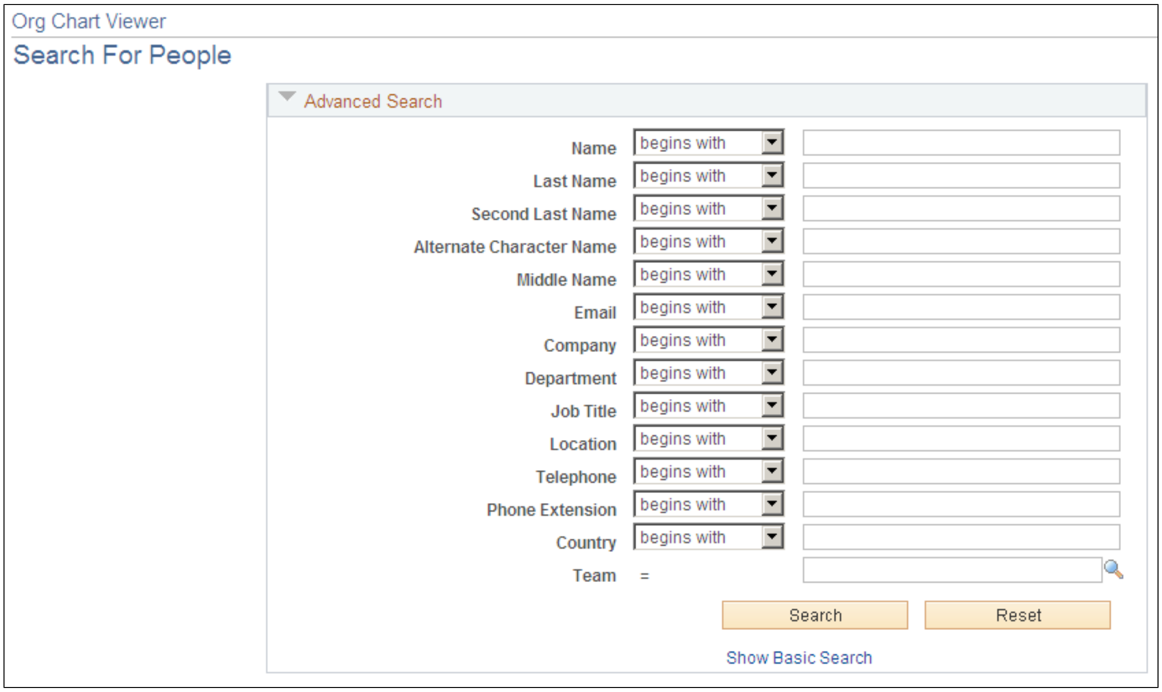
Note: Searches from within an org view type folder tab will perform a search within that folder only.

For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports. Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header.

Navigation:

Click the **Advanced Search** link within the header of any of the Org Chart Viewer folders or pages.

This example illustrates the fields and controls on the Org Chart Viewer - Search For People: Advanced Search page. You can find definitions for the fields and controls later on this page.

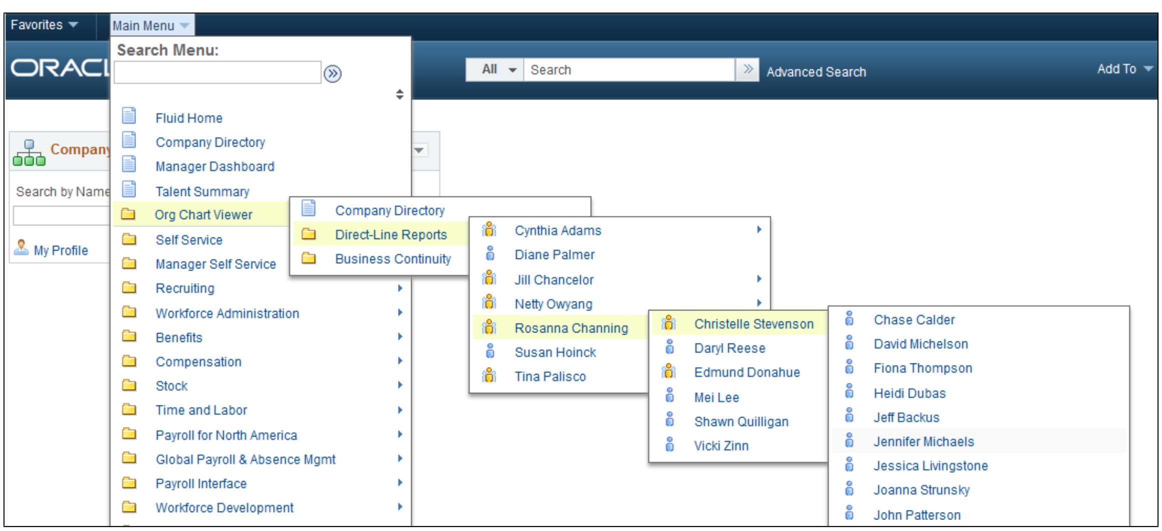


Enter search criteria in one or more of the fields on this page and click **Search.**

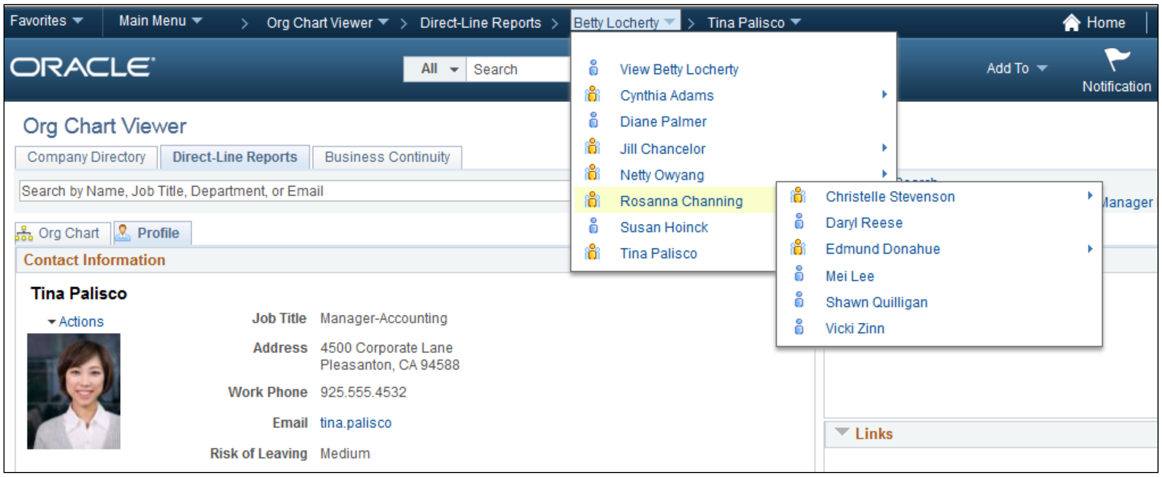
The SmartNavigation Menu Structure

The system uses Application Based Navigation (ABN), or SmartNavigation, which enables you an alternative method of navigating directly to an employee in the Org Chart Viewer (bypassing the search). The SmartNavigation menu navigation and breadcrumbs also provide a quick overview of the reporting structure of the employee jobs in the directory.

This example illustrates the fields and controls on the Example of the menu navigation using SmartNavigation fly-outs. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Example of the breadcrumb navigation using SmartNavigation fly-outs. You can find definitions for the fields and controls later on this page.



Searches for People with Multiple Jobs

When searching for a person who holds multiple jobs or assignments, and the Org Chart Viewer setup tables and trees are set up to support multiple jobs, the search will retrieve each active job held by the employee.

This example illustrates the fields and controls on the Search Results page showing an employee with multiple jobs. You can find definitions for the fields and controls later on this page.


Search Results

Search results for: "Steve Religioso".

Search Results Find | View All First 1-2 of 2 Last

Name	Job Title	Department	Telephone	Email
Steve Religioso	Bookkeeper	Accounts Payable	925.555.4532	HCMGENUser1
Steve Religioso	Specialist-Tech Training	Assembly	925.555.4532	HCMGENUser1

Cancel

Click the name link for the job title you wish to view. If, after clicking the name you find you accessed the wrong job information, you can select another job title for the person from the Org Chart or Profile pages.

Org Chart Page

Use the Company Directory: Org Chart page (HRCD_MAIN) to view an organizational chart for a person as a three-tiered chart with the person in the focus node in the middle level.

Or, you can view a hierarchical list of people with the retrieved person's record at the top of the list.

When you access the Company Directory folder from one of the other Org Chart Viewer folders, the page will display the person defined in the **Start Page Content** section of the Org Chart Viewer - Preferences Page as the focus root node.

Navigation:

- **Org Chart Viewer** > **Company Directory: Org Chart tab**
- **Company Directory** > **Company Directory: Org Chart tab**
- Click the **My Org Chart** link from the Company Directory header where the Company Directory: Org Chart tab is showing.
- Click the **Org Chart** link from within any node box for a person on the Company Directory: Org Chart page.

Use the Direct-Line Reports: Org Chart page (HRCD_MAIN) to view an organizational chart with you as the logged in user as the focus node and your direct reports below.

Or, you can view a hierarchical list of your direct-line reports with you at the second level and your manager at the top. When you search for a specific person, the page will display that person's manager at the top with their direct-line reports below.

Navigation:

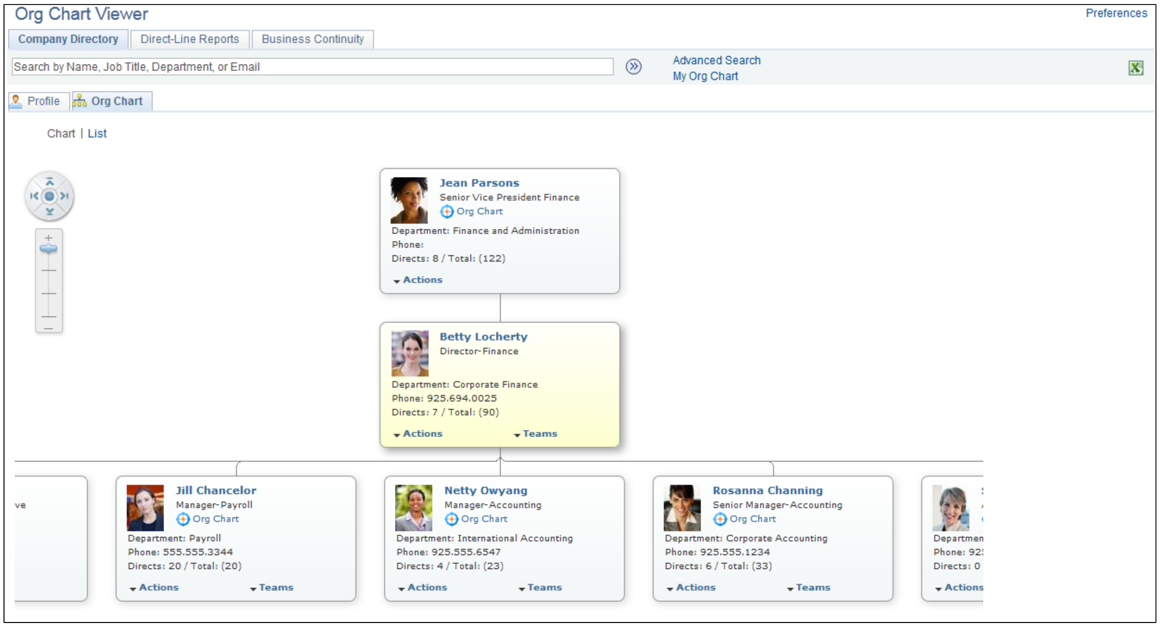
- **Org Chart Viewer** > **Direct-Line Reports** > **Org Chart tab**
- Click the **My Org Chart** link from the Direct-Line Reports header when the Direct-Line Reports: Org Chart page is showing.
- Click the **Org Chart** link from within any node box for a person on the Direct-Line Reports: Org Chart page.

Use the <matrix team name>: Org Chart page (HRCD_MAIN) to view a tiered organizational chart containing the matrix team's members. When you access the matrix team folders from one of the other Org Chart Viewer folders, the page will display the root person of the team in the focus node by default.

Navigation:

- **Org Chart Viewer** > **<matrix team name>** > **<matrix team name>: Org Chart**
- Click the **My Org Chart** link from the <matrix team name> header when the <matrix team name>: Org Chart page is showing.
- Click the **Org Chart** link from within any node box for a person on the <matrix team name>: Org Chart page.

This example illustrates the fields and controls on the Org Chart page for the org view type Company Directory folder tab showing the user as the focus node of the tree with no siblings showing. You can find definitions for the fields and controls later on this page.

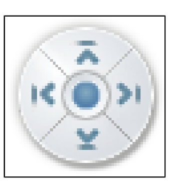
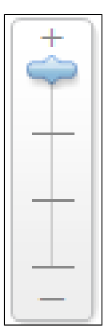


Each Org Chart page reflects the reporting structure of the org view type folder tab you are currently viewing.

The chart displays a maximum of three vertical levels at any time. If the person in the focus node does not report to another person (is in the top-most or root node position), or when the person in the focus node does not have any direct reports, the Org Chart page will display two levels only.

The focus node is displayed in a contrasting color from other nodes in the chart. You can change the focus node by clicking the Org Chart link in each node of the chart. Changing the focus node updates the contents of the Profile page to reflect the person who is in the focus node. Clicking the name link on a node will transfer you to the Profile page for that person and refocus the org chart on that node.

The fields that appear within the nodes are determined on the Chart and Profile Settings - Org Chart Content page.

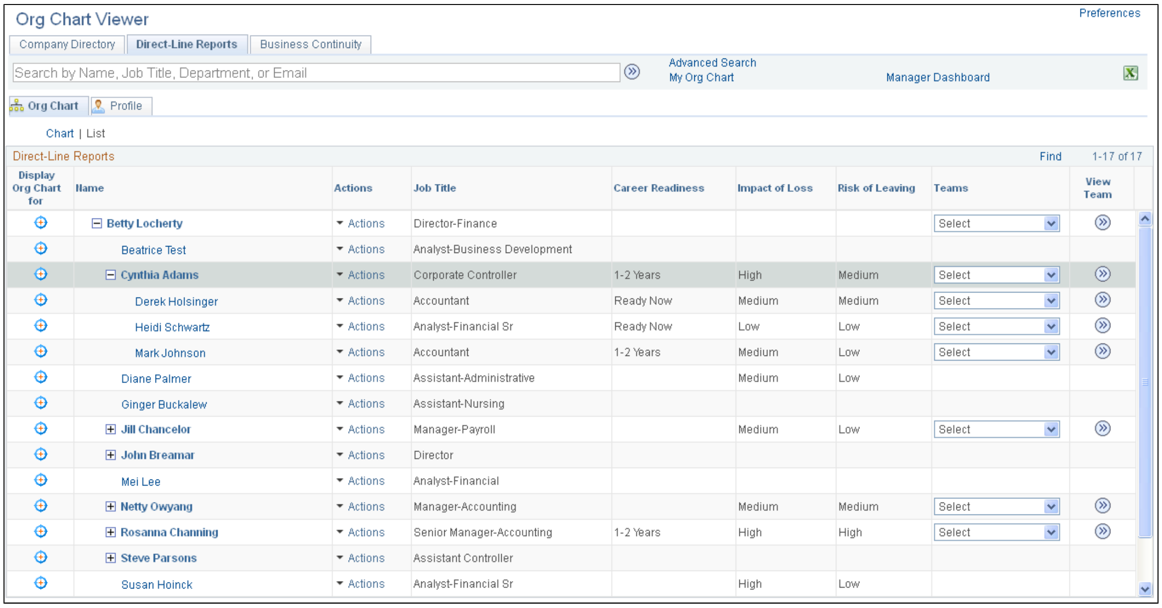
Field or Control	***Description***
 and 	The org chart appears with a navigator widget and zoom bar in the upper left-hand corner of the chart. Use the directional arrows to navigate left, right, up, or down. Click the dot in the center of the widget to center the chart on the focus node. If all of the nodes fit within the visible area of the chart, this widget does not appear. Use the zoom in feature (plus sign) to see more detail about a person in the node. As you zoom out (negative sign), you will see more nodes on a level associated with the hierarchical structure but less detail on each individual node.

Field or Control	***Description***
Chart and **List**	Select either of these links at the top of the Org Chart page to view the reporting structure as a three-tiered org chart or in an hierarchical grid (Hgrid) list format. See the Viewing the Org Chart as a List subtopic in this topic.
<a person's name link>	Click the name to access profile information for the person you have selected.
	Click the **Org Chart** link to move the focus of the chart to another node. This also sets the focus of profile page to the newly selected node.
Actions	Select a self service action for yourself, or as a manager, select an action to perform for your employees. The system will direct you to the respective self service page. The Actions menu link will display only for yourself or your direct reports if enabled. The PeopleSoft application delivers the various self service transactions to work in conjunction with the Org Chart Viewer. These related actions enable employees or managers to view or manage personal or employee information in the PeopleSoft database as they would from the self service pages. See the self service information under Understanding the Org Chart Viewer, Folder Tabs, and Page Functionality. See “(Classic) Reviewing and Updating Personal Information” (PeopleSoft eProfile).
Teams	Click this menu drop-down list to see a list of teams with which this person is associated. Select a team to open the Teams page and view the matrix team structure in a list format. The Team drop-down is not available if the person is not associated with a team or the team has not been made public.

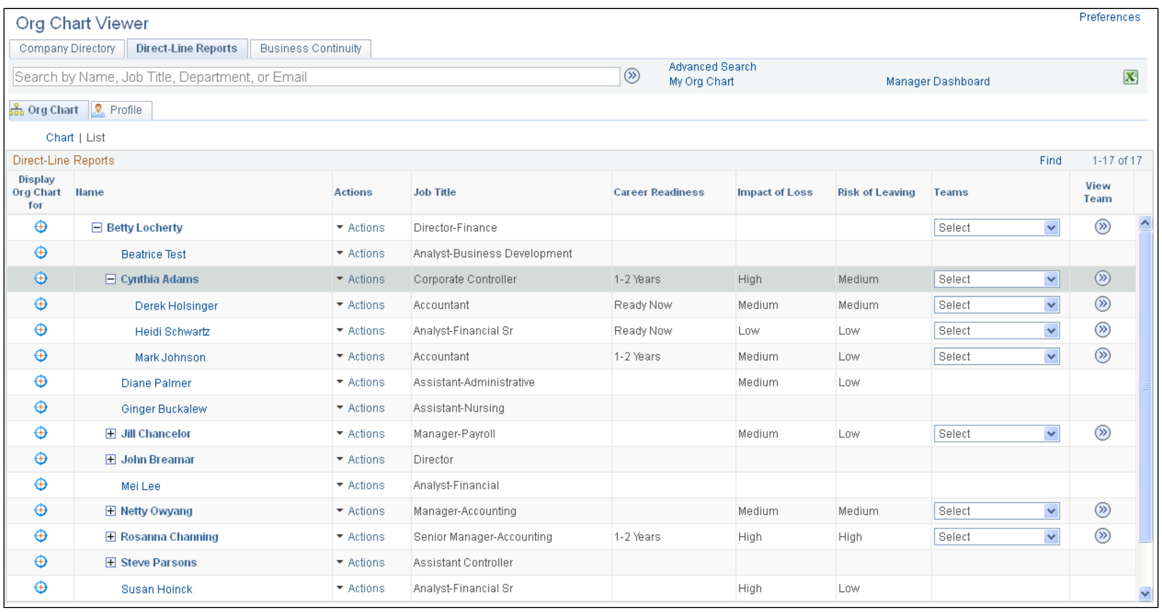
Viewing the Org Chart as a List

Access the List page (click the List link at the top of the Org Chart page).

This example illustrates the fields and controls on the Org Chart page displaying the reporting structure in an hierarchical (Hgrid) list format. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Org Chart page displaying the reporting structure in an hierarchical (Hgrid) list format. You can find definitions for the fields and controls later on this page.



When you select the **List** link, you change the display of the Org Chart page to a grid or hierarchical list view. You can expand or collapse the reporting structure to see who reports to whom.

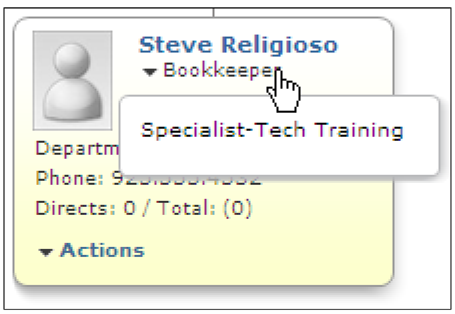
The **List** layout contains the same fields as the **Chart** option, as defined by the Org Chart Viewer administrator on the setup pages.

Field or Control	***Description***
Focus Org Chart on 	Click the icon button in the **Focus Org Chart on** column to transfer back to the chart layout, with that person as the focus.
Actions	Select an transaction to perform self service actions for yourself, your direct reports, or for those team members for which you are granted self service access.

Viewing a Person's Multiple Jobs from the Org Chart Page

When you are on the Org Chart page and a person holds multiple jobs, the node will display a **Job Title** drop-down arrow and menu link that enables you to select any job that this person holds. When you select a job from the drop-down list, the org chart refocuses on the newly selected job.

This example illustrates the fields and controls on the Focus node showing a person with multiple jobs. You can find definitions for the fields and controls later on this page.



Information about setting up the Org Chart Viewer to support multiple jobs is documented in the set up pages of the Org Chart Viewer.

See Setting Up the Org Chart Viewer and Company Directory.

Profile Page

Use the Company Directory: Profile page (HRCD_MAIN) to view a person's profile information from the Company Directory folder, such as contact information, HR details, and other personal information.

Users can enter additional contact information, links, and text on this page for their own profile.

Navigation:

- **Org Chart Viewer** > **Company Directory: Profile tab**
- **Company Directory** > **Company Directory: Profile tab**
- Click the **My Profile** link from the Company Directory heading where the Company Directory, Profile tab is showing.
- Click the name link of a person on either the Company Directory: Org Chart or Profile page.

Use the Direct-Line Reports: Profile page (HRCD_MAIN) to view a person's profile information from the Direct-Line Reports folder for you or one of your direct-line reports, such as contact information, company details, and other personal information.

Users can enter additional contact information, links, and text on this page for their own profile.

Navigation:

- **Org Chart Viewer** > **Direct-Line Reports: Profile tab**
- Click the **My Profile** link from the Direct-Line Reports header when the Direct-Line Reports: Profile tab is showing.
- Click the name link of a person on either the Direct-Line Reports: Org Chart or Profile page.

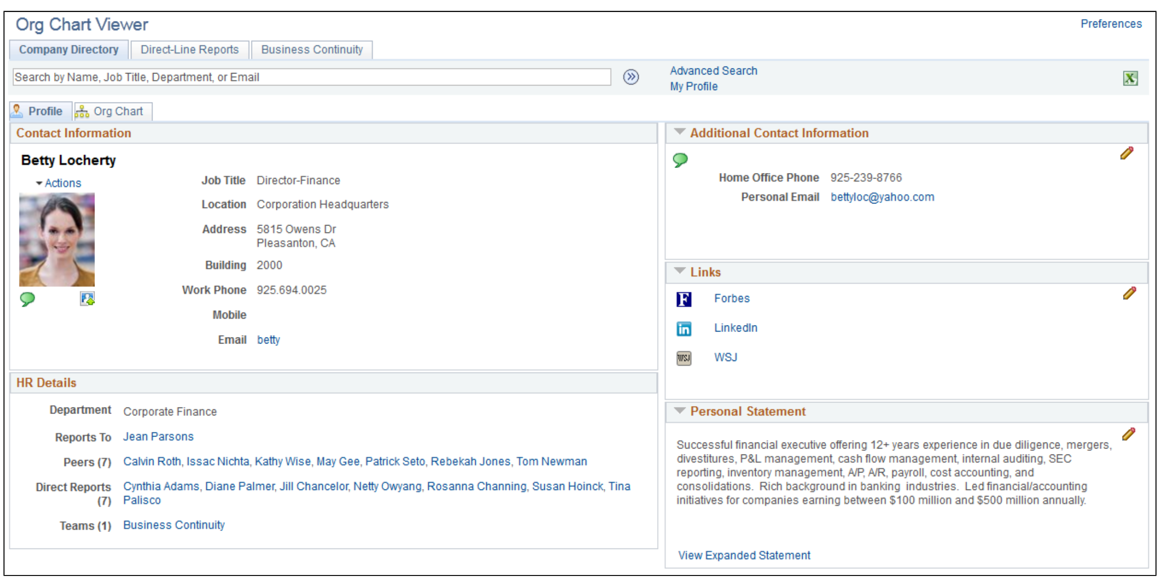
Use the <matrix team name>: Profile page (HRCD_MAIN) to view a matrix team member's profile information, such as contact information, HR details, and other personal information.

Users can enter additional contact information, links, and text on this page for their own profile.

Navigation:

- **Org Chart Viewer** > **<matrix team name>** > **<matrix team name>: Profile tab**
- Click the **My Profile** link from the <matrix team name> header when the <matrix team name>: Profile tab is showing.
- Click the name link of a person on either the <matrix team name>: Org Chart or Profile page.

This example illustrates the fields and controls on the user’s Profile page in the Company Directory. You can find definitions for the fields and controls later on this page.



This page displays details regarding the person in focus on the organizational chart.

This page displays up to five group boxes, depending on how the system administrator has configured this page on the Chart and Profile Settings - Profile Content page. A user can modify the group boxes on the right side of the Profile page when viewing his or her own profile. These group boxes are:

- Contact Information

  Depending on the set up, this group box can include items such as an employee photo, job and location information, contact information, links for e-mail addresses, and a drop-down list for a user to perform self service actions for him or herself. This group box is not editable to the user.

- HR Details

  Depending on the set up, this group box can include items such additional job information and co-worker and reports to links. This group box is not editable to the user.

- Additional Contact Information

  Users can enter their own person contact data, such as phone numbers and emails, on their own profile.

- Links

  Users can enter person links, such as web engines and social web sites, on their own profile.

- Personal Statement

  Users can enter personalized text to appear on their own profile. Users can view another person's statement. For large amounts of text, select the **View Expanded Statement** link to view all the text in another window. If there is no text in the Personal Statement group box, the **View Expanded Statement** link will not appear on the page.

Fields on this page will also vary depending upon the setup. Use the links on the page to access other people's Profile pages. Enter or edit content for the personalized group boxes by using the edit (pencil) icon to access the specific pages for your own profile.

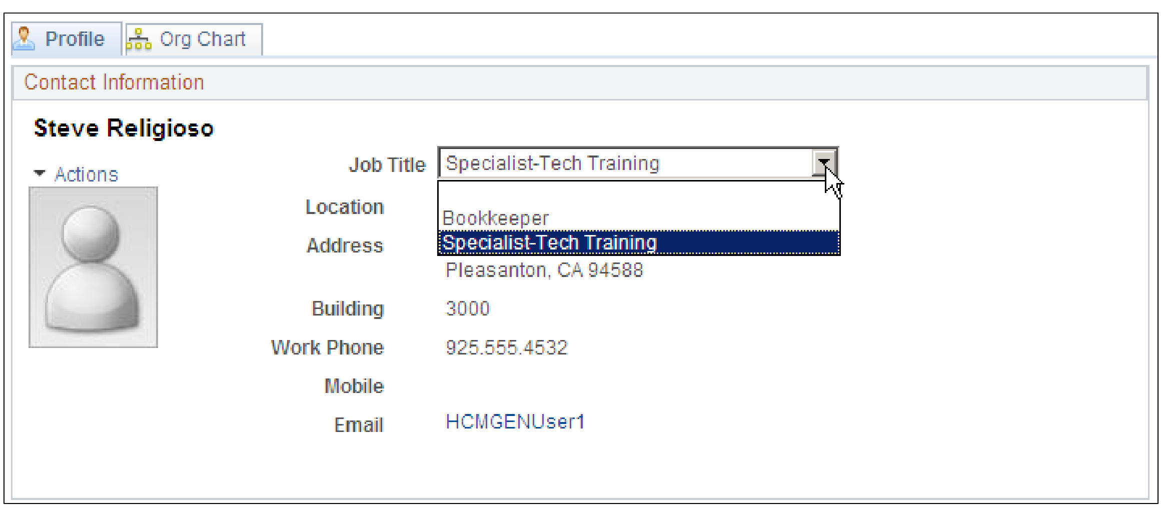
Field or Control	***Description***
Actions	Select a self service action for yourself, or as a manager, select a self service action to perform for your employees. The system will direct you to the appropriate self service page. PeopleSoft delivers the various self service transactions to work in conjunction with the Org Chart Viewer that enable employees or managers to view or manage personal or employee information in the PeopleSoft database as they would from the self service pages. This link will be available for your profile or for your direct-line reports' profiles, if enabled. See Understanding Related Actions and Self Service Transactions. See "(Classic) Reviewing and Updating Personal Information" (PeopleSoft eProfile). See "Understanding the Management of Direct Reports" (PeopleSoft eProfile Manager Desktop).

Field or Control	***Description***
Employee Photo	The page displays the HR system photo of the employee, if available, or a default photo, when the **Display on Self Service** check box is selected on the "HCM Options Page" (Application Fundamentals) of the Installation Table.
(Update Photo icon)	Click this icon to open the Org Chart Viewer - Update Photo Page and change your photo display options. **Note:** This icon is available only when the **Allow Employee to Upload Photo** check box is selected on the "HCM Options Page" (Application Fundamentals) of the Installation Table.
(Edit icon)	Click this edit icon to access the corresponding edit page for the personalization group boxes on the Profile page This icon is available for your Profile only. **Note:** Any edits or updates made in the editable group boxes of this page are not written to the HR records. This data is stored in the Org Chart Viewer only
Teams	Displays a list of published matrix teams with which this person is associated. Click a team link to open the Teams page and see a list of team members.

Viewing a Person's Multiple Jobs from the Profile Page

When you are viewing the Profile page and a person holds multiple jobs, the **Job Title** field will display a drop-down list that enables you to select another job for this person. Select another job to have the system redirect you to the Profile page for that job.

This example illustrates the fields and controls on the Profile page showing a person with multiple jobs. You can find definitions for the fields and controls later on this page.



See Setting Up the Org Chart Viewer and Company Directory.

Org Chart Viewer - Update Photo Page

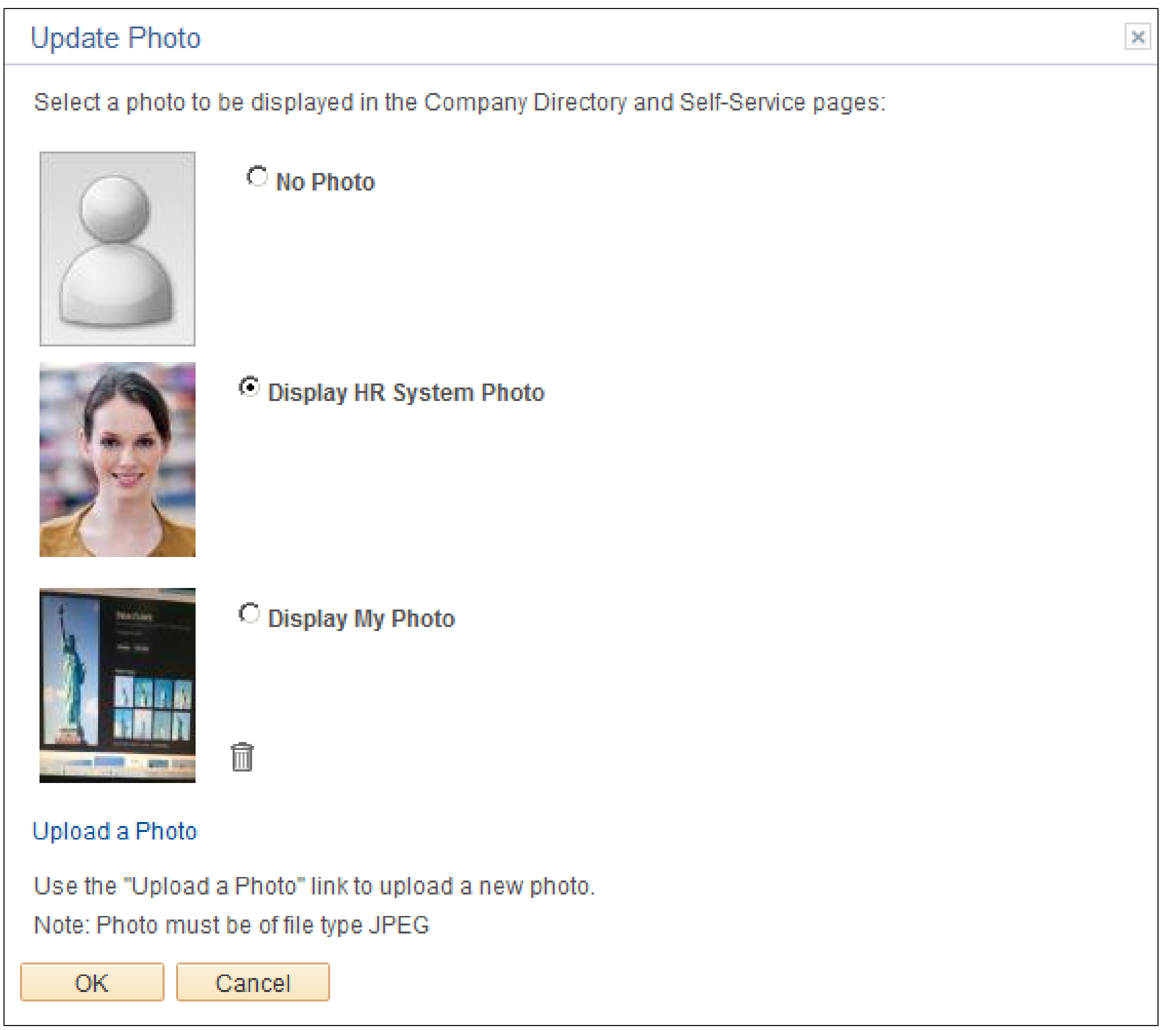
Use the Org Chart Viewer - Update Photo page (HRCD_USER_PICS_SEC) to select photo display options, such as no photo, upload your own photo, or use the HR photo that is on file, for your personal profile. The photo you select here is shown on all the pages that display an employee photo.

Navigation:

Click the **Update Photo** icon link on any Org Chart Viewer - Profile page when you are on your own profile.

Note: The **Update Photo** icon is available only if the **Allow Employee to Upload Photo** check box is selected on the “HCM Options Page” (Application Fundamentals) of the Installation Table.

This example illustrates the fields and controls on the Org Chart Viewer - Update Photo page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
No Photo	Select this option to have the pages that display an employee photo show a default photo image.
Display HR System Photo	Select this option to have the pages that display an employee photo show the company stored photo image of yourself.
Display My Photo	Select this option to have the pages that display an employee photo show a photo image of yourself that you have uploaded. If you have not uploaded an image for yourself, this option will not be available.
Upload a Photo	Click this link to upload your own photo image. The photo must be a JPEG and the upload size is determined by the employee photo settings on the “HCM Options Page” (Application Fundamentals). After uploading, this image becomes the **My Photo** image.

Edit Additional Contacts Page

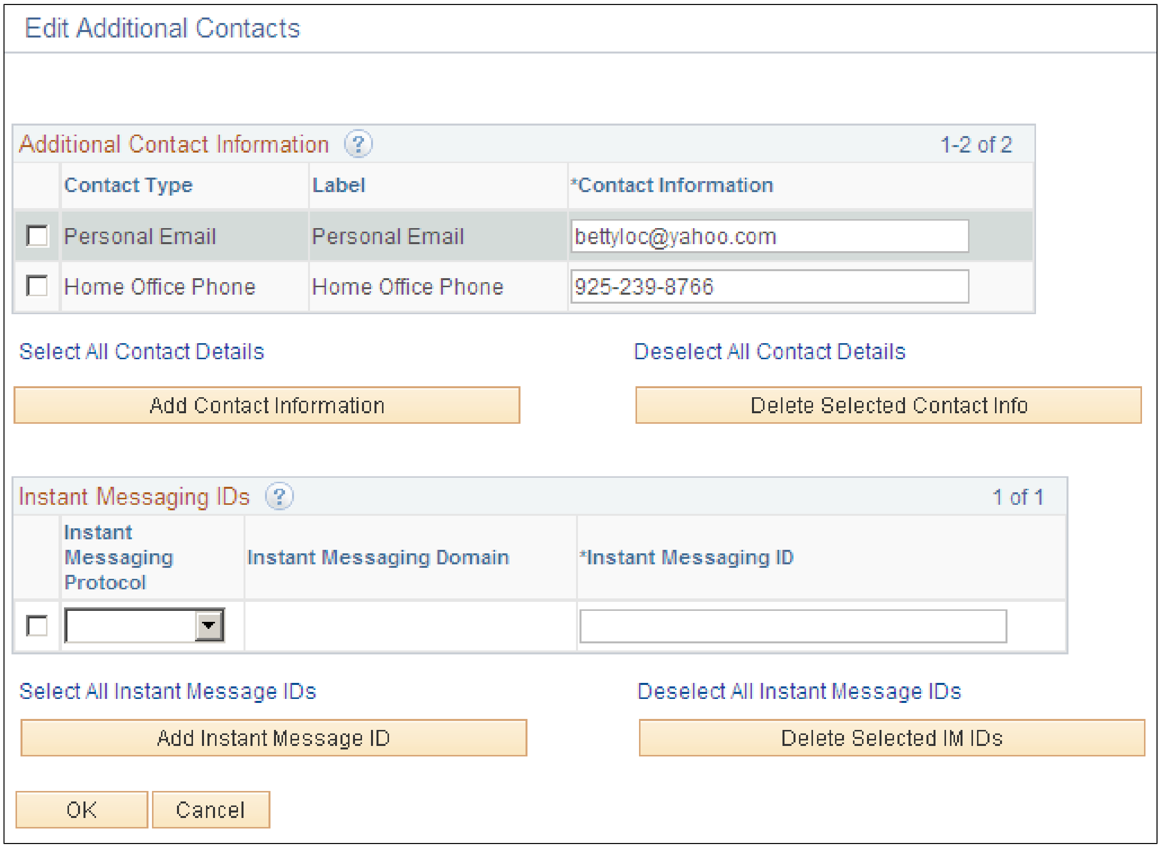
Use the Edit Additional Contacts page (HRCD_USER_CNTC_SEC) to add additional contact information to your personal profile, such as home phone number, mobile, IM address, or email addresses.

The data you enter here is the same across all org view type Profile pages.

Navigation:

Click the Edit Additional Contact (pencil) button on the Profile page when you are in your own profile.

This example illustrates the fields and controls on the Edit Additional Contacts page. You can find definitions for the fields and controls later on this page.



Additional Contact Information

Field or Control	*Description*
Contact Type, Label, and Contact Information	Select a contact type and the related label will appear. You can enter your specific contact details in the **Value** field. When the *Other* contact type is available and selected, the you can enter your own label name, which will serve as the field description on the Profile page. Contact types are defined by the administrator on the Additional Contacts page.
Add Contact Information	Select this button to insert another contact row and add additional contact types.

Field or Control	***Description***
Select All Contact Details, Deselect All Contact Details, and **Delete Selected Contact Info** (delete select contact information)	Select the appropriate check box to select or deselect all additional contact information rows. Or, select rows individually for deletion. Select the **Delete Selected Contact Info** button to remove the contact rows you have selected.

Note: Any edits or updates made in the **Additional Contact Information** group box are not written to the HR records. This data is stored in the Org Chart Viewer only.

Instant Messaging IDs

Field or Control	***Description***
Instant Messaging Protocol, Instant Messaging Domain, and Instant Messaging ID	Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO,* which will display the Instant Message domain associated with the **IM Protocol.** Enter the you chat ID as the **Network ID.**
Add Instant Message Contact	Select this button to insert another IM contact row.
Select All Instant Messaging IDs, Deselect All Instant Messaging IDs, and **Delete Selected IM IDs**	Select the appropriate check box to select or deselect all instant messaging ID rows. Or, select rows individually for deletion. Select the **Delete Selected IM IDs** button to delete the IM contact rows you have selected.

Edit My Profile Links Page

Use the Edit My Profile Links page (HRCD_USER_LINK_SEC) to add web site links to your own personal profile.

The data you enter here is the same across all org view type Profile pages.

Navigation:

Click the Edit My Profile Links Contact (pencil) button on the Profile page when you are in your own profile.

This example illustrates the fields and controls on the Edit My Profile Links page. You can find definitions for the fields and controls later on this page.

Field or Control	***Description***
Profile Link Name and **Web Address**	Enter the label name and web site address that should appear as a link on your Profile page.
Add Link	Select this button to insert another link row and enter how the name should display in your profile and the web address.
Select All Links, Deselect All Links, and **Delete Selected**	Select the appropriate check box to select or deselect all profile link rows. Or, select rows individually for deletion. Select the **Delete Selected** button to delete the link rows you have selected.

Note: Any edits or updates made in the **My Profile Links** group box are *not* written to the HR records. This data is stored in the Org Chart Viewer only.

Edit Personal Statement Page

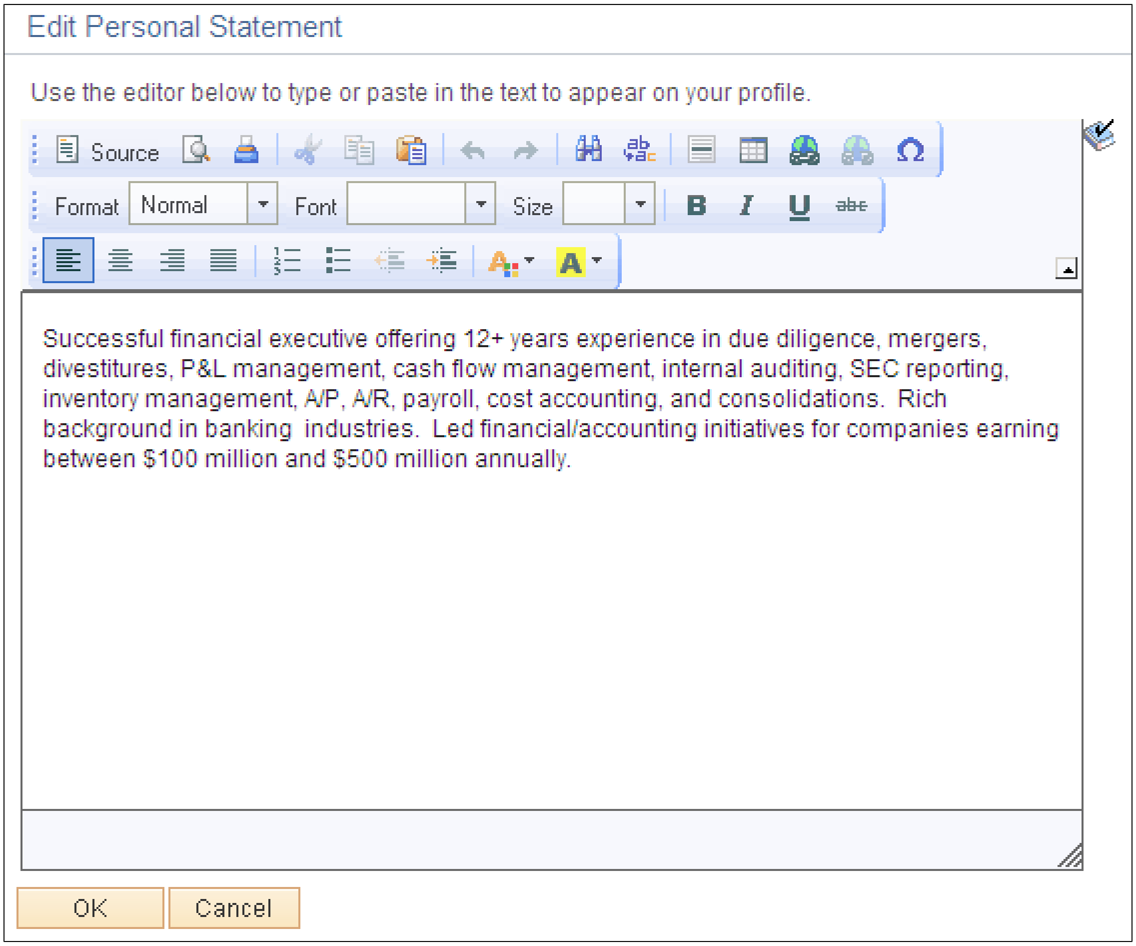
Use the Edit Personal Statement page (HRCD_USER_TEXT_SEC) to include a personal statement or comments using a rich text formatting to your own personal profile.

The data you enter here is the same across all org view type Profile pages.

Navigation:

Click the Edit Personal Contact (pencil) button on the Profile page when you are in your own profile.

This example illustrates the fields and controls on the Edit Personal Statement page. You can find definitions for the fields and controls later on this page.



The Edit Personal Statement page opens up in a modal, resizable window. Enter data and click **OK** to save your text that will display on the Profile page, Personal Statement group box.

Note: Any edits or updates made in the **Personal Statement** group box are not written to the HR records. This data is stored in the Org Chart Viewer only.
For more information on using the Rich Text Editor, see *PeopleTools: Using PeopleSoft Applications,* "Using PeopleSoft Application Pages," Working With the Rich Text Editor.

Org Chart Viewer - Teams Page

Use the Teams page (HRCD_LIST_SEC) to view all the members of a matrix team as an Hgrid list, with matrix leads appearing as expandable rows.

Navigation:

Click the name of a matrix team on any person's node or profile.

This example illustrates the fields and controls on the Teams page. You can find definitions for the fields and controls later on this page.

Use this page to view the members and reporting structure of a matrix team. The fields on this page are determined by the Org Chart Viewer administrator during setup of the Matrix Reports.

User access to the self service self service transaction pages is determined by security access or when setting up the matrix team.

Related Links

Matrix Team Page
Action Assignment Page
Assign Transaction Access Page

Using the PeopleSoft Fluid User Interface for the Company Directory

Use the Fluid Company Directory to view employee personal and job data within the context of your organization's various hierarchical reporting structures.

These topics provide an overview of directs, dotted line, matrix team reporting, company directory Actions List menu options, and discusses how employees and managers use the PeopleSoft Fluid User Interface to view the Company Directory.

These videos provide overviews of Company Directory-related enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 17: Fluid Company Directory Usability Improvements

Video: Image Highlights, PeopleSoft HCM Update Image 23: Dotted Line Reporting for HR

Video: PeopleSoft Dotted Line Relationship Management

Video: Image Highlights, PeopleSoft HCM Update Image 24: Company Directory Setup Enhancement

Video: Image Highlights, PeopleSoft HCM Update Image 27: Company Directory–Org Chart Actions

Video: Image Highlights, PeopleSoft HCM Update Image 28: Company Directory-Display Empty Positions

Video: Image Highlights, PeopleSoft HCM Update Image 28: Company Directory-HR Administrator Org Chart Export

Video: Image Highlights, PeopleSoft HCM Update Image 33: Company Directory Assistant Chatbot

Video: Image Highlights, PeopleSoft HCM Update Image 45: Configurable Fluid Header Display

For setup considerations, see Setting Up the Org Chart Viewer and Company Directory.

To see the direct line reports in a PeopleSoft Fluid User Interface, see the My Team feature documented in the “Using the PeopleSoft Fluid User Interface to Perform Manager Tasks” (PeopleSoft eProfile Manager Desktop) topic.

For general information about fluid pages and Company Directory pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Related Links

Understanding Employee Directory Assistant
Understanding the Org Chart Viewer and Company Directory Setup Steps
Using the Org Chart Viewer

Pages Used to View the Company Directory Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Company Directory Tile	HC_HR_SRCH_CD_GBL (this is the cref for the tile)	Access the Company Directory pages.
Company Directory Home Page	HRCD_CO_DIRECT_FL	Search for individuals within your organization.
Company Directory - Search Results Page	HRCD_SEARCH_FL	View a list of employees that meet your search criteria.
Company Directory Profile Page Layout	N/A	The Company Directory - Profile pages appear within the context of a multi-panel layout. When using a medium to large form factor device, the application displays a left panel navigation, which consists of page category tabs from which you select to view contextual data in the main panel. When using a small form factor device, there is no left panel navigation but contextual data appears directly on the page. Click rows within the page to view additional information about an item.

Page Name	***Definition Name***	***Usage***
(Smartphone) Profile Page	HRCD_PROFILE1_FL	View or access details about a person such as contact information, organizational information, job details, a personal statement, or links this person has added to his or her profile.
Profile - Contact Information Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL	View contact information such as phone numbers, emails, and location details.
Address Page	HR_ADDR_MAP_FL	View the employee's location on a map.
Add Contact or Edit Contact Page	HRCD_PROFILE1_SCF	Add, update, or delete additional contact information on your personal profile, such as home phone number, mobile, or email addresses.
Edit Time Zone Page	HRCD_PROFILETZ_SCF	Enter the time zone for where you work.
Profile - Reporting Structure Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL HRCD_PROFILE2_FL	View the reporting structure for the person whose profile you are accessing.
<Number> Dotted Line Managers Page	HRCD_DOT_LINE_SCF	View the dotted line managers for a person.
Profile - Manage Dotted Line Page	HRCD_PROFILE1_FL HRCD_PROFILE5_FL	Create or remove dotted line reporting relationships for a person.
Person Search Page	HR_PSEL_FLU	Search for and select a person as a dotted line report or dotted line report manager for this person.
Profile - Directs Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL HRCD_PROFILE3_FL	View direct or dotted line reports of the person profile that you have accessed.
Profile - Peers Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL HRCD_PROFILE3_FL	View your peers, or the peers of the person profile that you have accessed in the content area, sorted by display name.

Page Name	***Definition Name***	***Usage***
Other Teams - <Team Name> Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL HRCD_PROFILE3_FL	View a list containing the matrix team's members.
Profile - Job Details Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL	View company and job details about a person.
Profile - Business Partners Page	HRCD_PROFILE1_FL HRCD_PROFILER_FL	View business partner contact information for an individual.
Profile - Remote Worker Status Page	HRCD_PROFILE1_FL	View a summary of the remote work details for the person.
Profile - About Page	HRCD_PROFILE1_FL HRCD_PROFILE4_FL	View a personal statement or links this person has added to his or her profile.
Personal Statement Page	HRCD_PROFILE3S_SCF	Add, update, or delete a personal statement or comment on your profile.
Link Page	HRCD_PROFILE3L_SCF	Add, update, or delete website links to your own personal profile.
Organization Chart Page	HRCD_ORG_CHART_FL	View the hierarchical reporting structure of a person.
(Desktop) <Employee Name> - Organization Chart Page	HRCD_ORG_CHRT_SCF	Print the three-tiered hierarchical structure for a person.

Understanding Directs, Dotted Line, and Matrix Team Reporting

In addition to viewing contact and personal information, the PeopleSoft Fluid Company Directory enables you to view the reporting structures of individuals within the organization. An intuitive visualization of such relationships in the Company Directory and Org Chart Viewer will help employees easily view and understand them. The company directory displays the following reporting relationships:

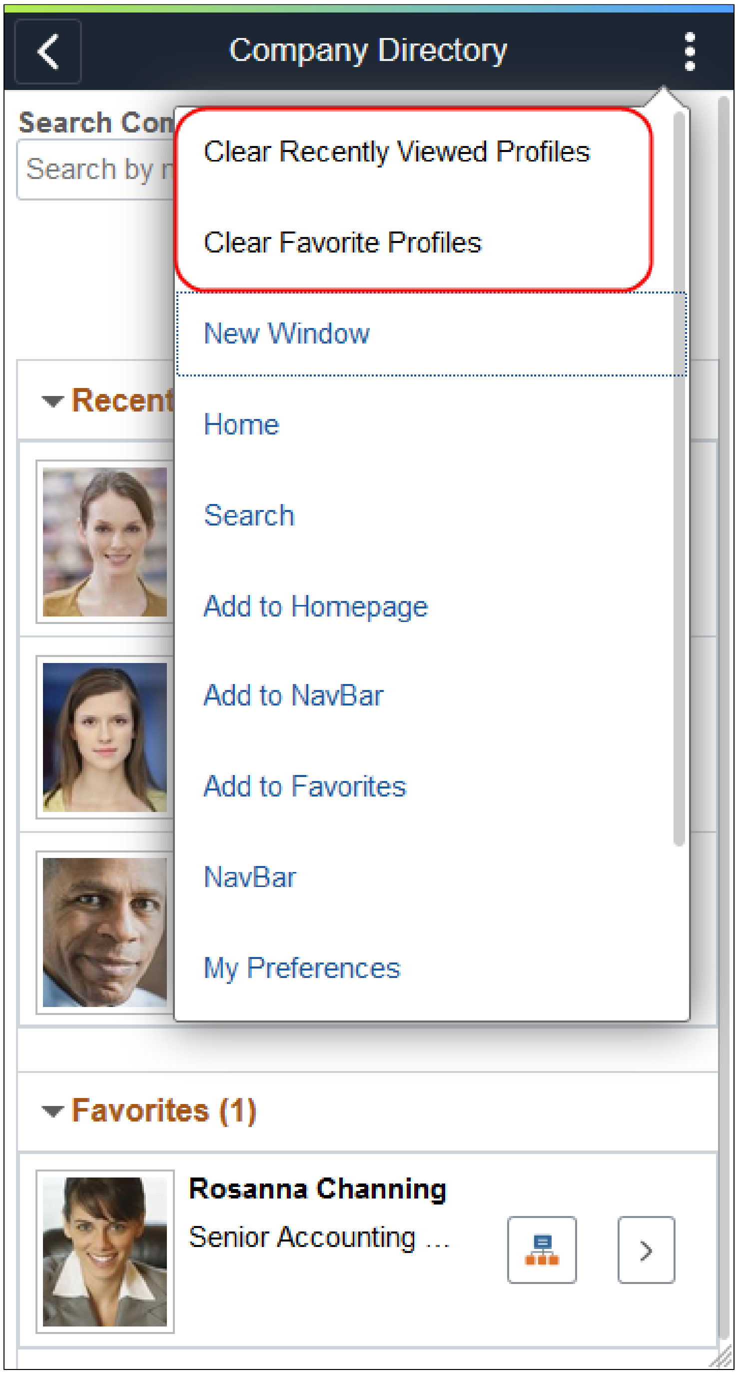
Term	***Definition***
Directs	Represents the organizational reporting structure as defined on the Tree Builder Run Control Page for the *COMPANY_ DIRECTORY* tree structure ID.

Term	***Definition***
Dotted Line	These relationships are typically between two individuals, where one individual is a dotted line report to another individual, for purposes such as mentoring, providing a service or function due to a specialized role, or cross team collaboration.
Teams (Matrix Teams)	Represents groups of individuals that are team or project based. Team leads may be able to assign some tasks or view data for the employee as defined on the Setup Matrix Types Page for the team matrix type.

Understanding Company Directory Actions List Menu Options

Use the Actions List menu from the Company Directory pages to perform additional Company Directory-related actions.

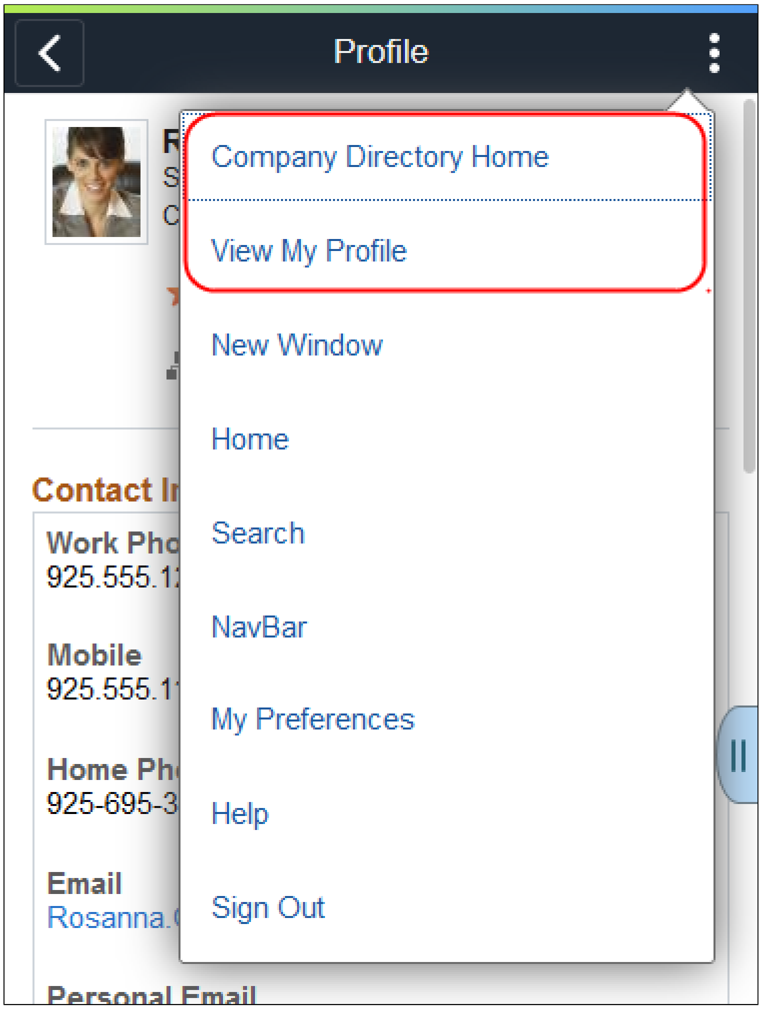
This example illustrates the Actions List menu options for the Company Directory.



When you access the Company Directory in fluid, the banner displays the Actions List icon button in the top right corner. The first two items in the Actions List menu are specific to the Company Directory and allow you to clear the contents in the **Recently Viewed** or **Favorites** sections of your Company Directory Home Page.

The remaining Actions List options are general to the PeopleSoft Fluid User Interface and application.

This example illustrates the Actions List menu options for the Company Directory from the Profile pages.



From the Profile pages, the menu items enable you to return to the Company Directory home page, or provide access to your own Profile pages if you are not on your own profile.

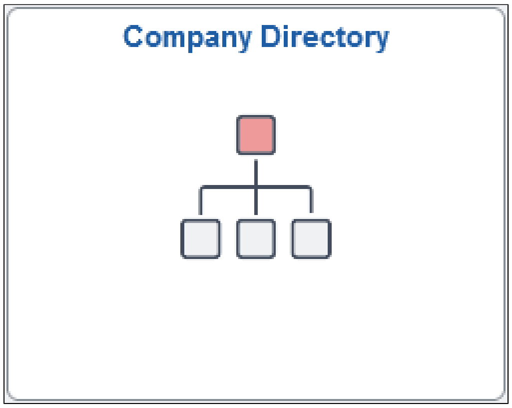
Company Directory Tile

Employees and managers use the Company Directory tile to access the Company Directory pages.

Navigation:

The Company Directory tile is delivered as part of the fluid Employee Self Service and Manager Self Service home pages, but the location may vary if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the Company Directory tile.



Click this tile to access the Company Directory pages and content.

Related Links

Using the Org Chart Viewer

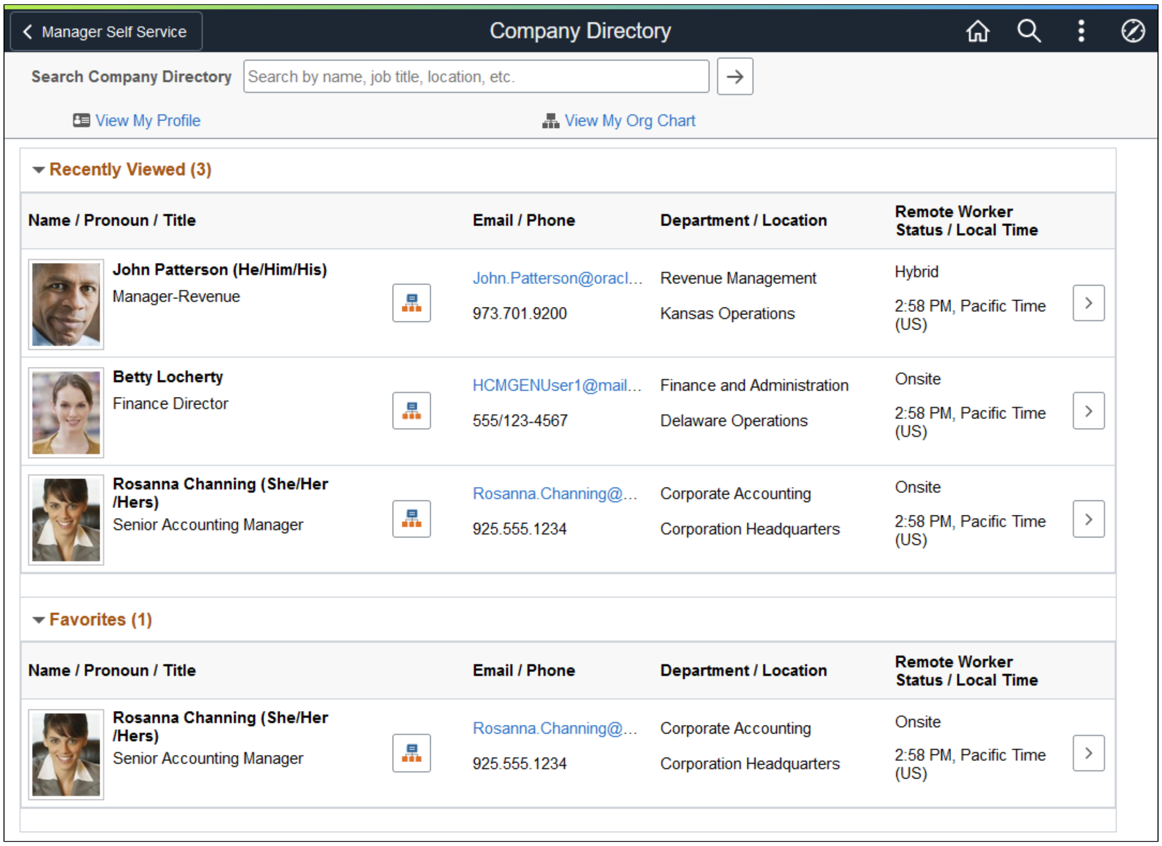
Company Directory Home Page

Use the Company Directory home page (HRCD_CO_DIRECT_FL) to search for individuals within your organization. This landing page also displays two other collapsible sections: a list of employee profiles you have recently viewed and a list of individuals you have added to your Company Directory favorite's list.

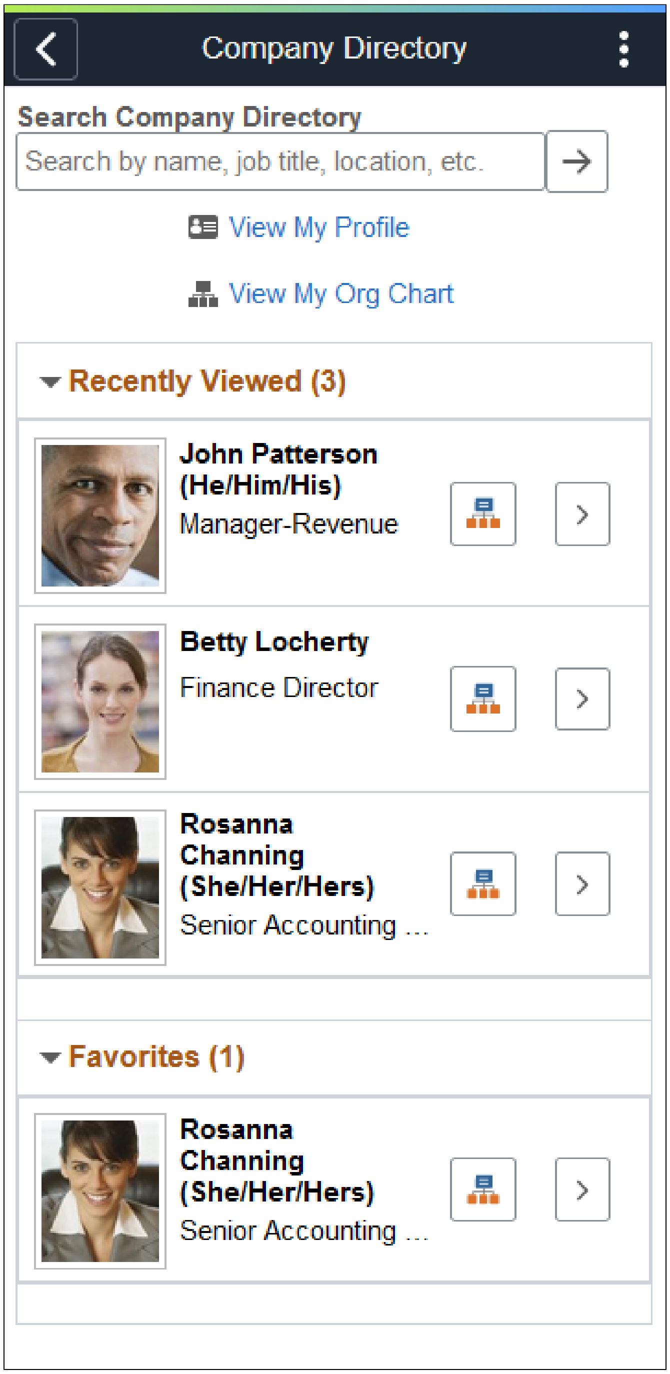
Navigation:

Click the Company Directory tile on the delivered fluid "Employee Self Service Homepage" (Application Fundamentals) or "Manager Self Service Homepage" (Application Fundamentals) (or any other home page with the tile).

This example illustrates the Company Directory home page.



This example illustrates the on the Company Directory home page for the smartphone.



A standard banner appears at the top of every fluid page. For more information see "Common Elements Used with PeopleSoft Fluid User Interface" (Application Fundamentals).

Field or Control	***Description***
Search Company Directory	Enter basic search criteria in this field, such as name, department, location, or so forth and click the **Run Search** button to locate specific individuals. You can search for any person in the company's organization using the PeopleTools Search Framework, based on the Company Directory tree. A person must be present in the tree to appear in the directory. **Note:** This framework searches for people in a company directory tree. You cannot search for positions, even if you are using a tree that includes empty positions. For information on the process to building your company trees, see Understanding the Org Chart Viewer and Company Directory Setup Steps.
View My Profile link	Select this link to quickly access your own profile without entering search parameters.
View My Org Chart link	Select this link to access the Organization Chart Page with you in the focus node.

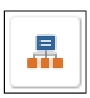
Recently Viewed

Use this section to view and access recently viewed profiles, if any. A person appears in this list when you have viewed their profile in the past. The list displays employees in descending order of date of access. The pages displays a maximum of 20 people.

When there are individuals listed in your **Recently Viewed** section but not listed in the **Favorites** section, the home page displays this section expanded by default.

Clear your Recently Viewed list by accessing the Actions icon button in the banner and select the **Clear Recently Viewed Profiles** action item. See also Understanding Company Directory Actions List Menu Options.

Field or Control	***Description***
Name	Displays the person's name.

Field or Control	***Description***
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - “HCM Options Page” (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - “Gender Details Page” (PeopleSoft eProfile) in employee self service.
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.

Field or Control	***Description***
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
(View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

This video demonstrates the additional display configuration options for the Company Directory:

Video: Image Highlights, PeopleSoft HCM Update Image 45: Additional Display Configurability for Company Directory

Favorites

Note: This section has the same field elements and controls as the **Recently Viewed** grid.

Use this section to view and access the profiles of those you have listed in your favorites, if any. Add or remove a person from your favorites list when viewing their profile. For more information, see the Company Directory Profile Page Layout, Header subtopic. The favorites list displays employees in alphabetical order by display name.

When there are individuals listed in your **Favorites**, the home page displays this section expanded by default. When no favorites exist, the page displays an expanded **Recently Viewed** section by default, if values are present there.

Clear your favorites list by accessing the Actions icon button in the banner and select the **Clear Favorite Profiles** action item. See also Understanding Company Directory Actions List Menu Options.

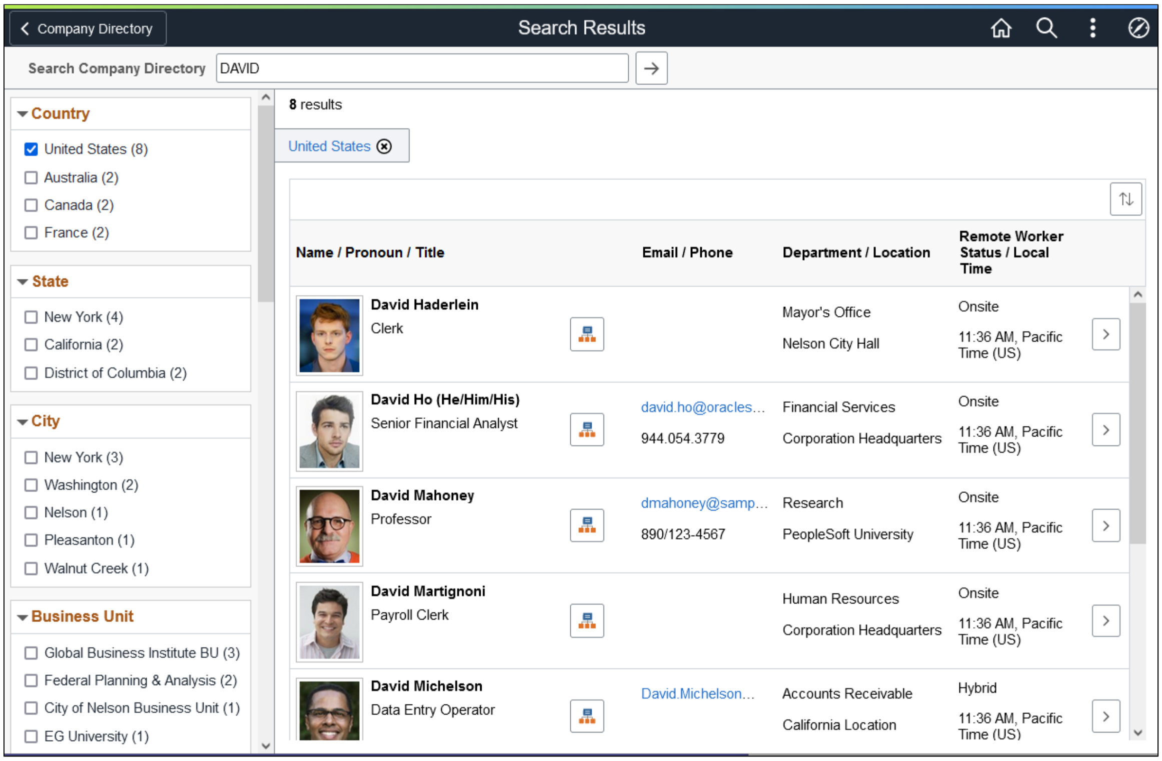
Company Directory - Search Results Page

Use the Company Directory - Search Results page (HRCD_SEARCH_FL) to view a list of employees that meet your search criteria.

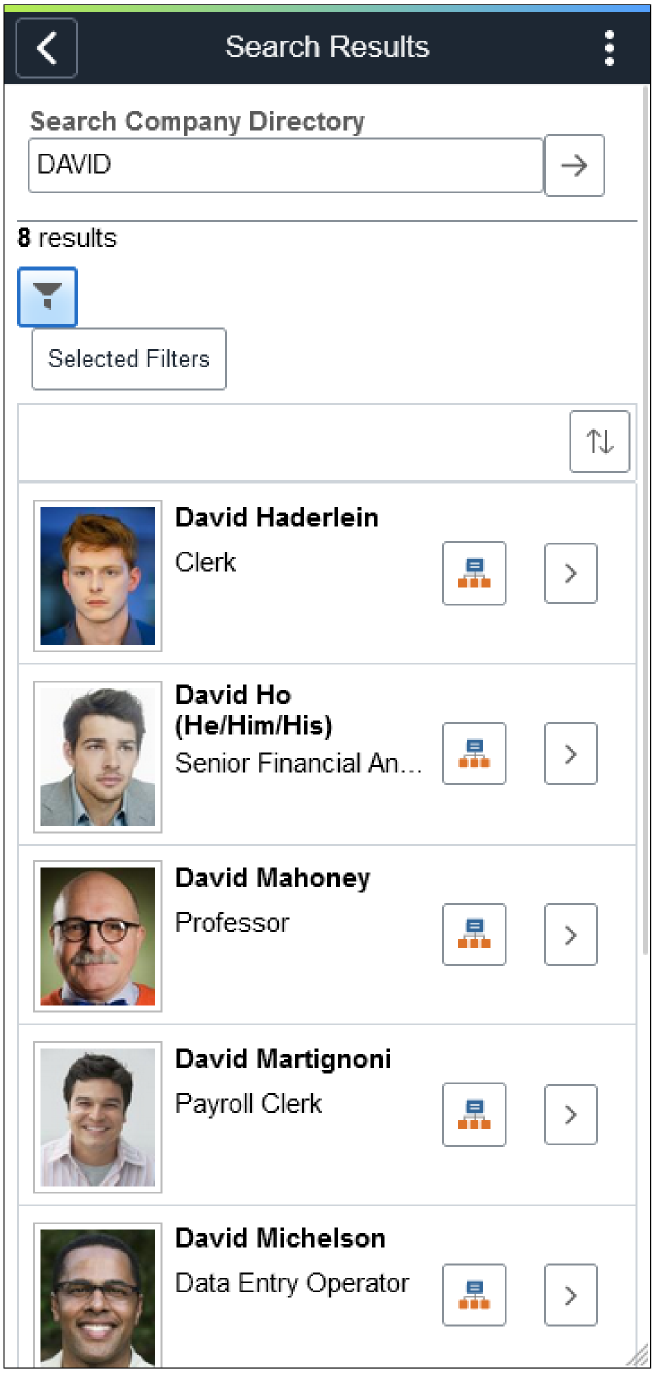
Navigation:

Enter search criteria in the **Search Company Directory** field on the Company Directory Home Page and select the **Run Search** (—>) button.

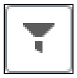
This example illustrates the Company Directory - Search Results page.



This example illustrates the Company Directory - Search Results page for the smartphone.

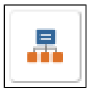
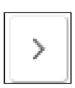


(Desktop or Tablet) When using a larger form factor, like a tablet or workstation, a filter panel appears on the left side of the page, which shows facets with counts of those that match that search criteria. Select facet to filter results further. The search results will reset to show only those that meet the additional criteria. The filters you select appear as boxes at the top of the page. Click the X to cancel a filter item, or if there is more than one filter, you can click the **Clear All** link to remove all filters.

Field or Control	***Description***
 (Search Filter icon) and  (Search Filter icon with filters applied) buttons	(Smartphone) Click to display the Filters page and select or deselect facets. When you have identified all your criteria, select **Done** on the Filters page to return to the Search Results page. When filters are in place, the **Search Filter** button is colored and a **Selected Filters** button now appears on the page.
 (Selected Filters) button	(Smartphone) This button is available when filters have been applied. Click to view or remove the filters that are in place.
Clear All link	This link appears next to the listed filters when more than one facet is selected. For larger form facts, the link appears after the filter criteria boxes across the top of the page. For smaller devices, the Clear All link is accessible when you click the Selected Filters button. Click the **Clear All** link to remove all filters.

Results Grid

Field or Control	***Description***
Name	Displays the person's name.
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - "HCM Options Page" (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - "Gender Details Page" (PeopleSoft eProfile) in employee self service.

Field or Control	***Description***
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
 (View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

This video demonstrates the additional display configuration options for the Company Directory:

Video: Image Highlights, PeopleSoft HCM Update Image 45: Additional Display Configurability for Company Directory

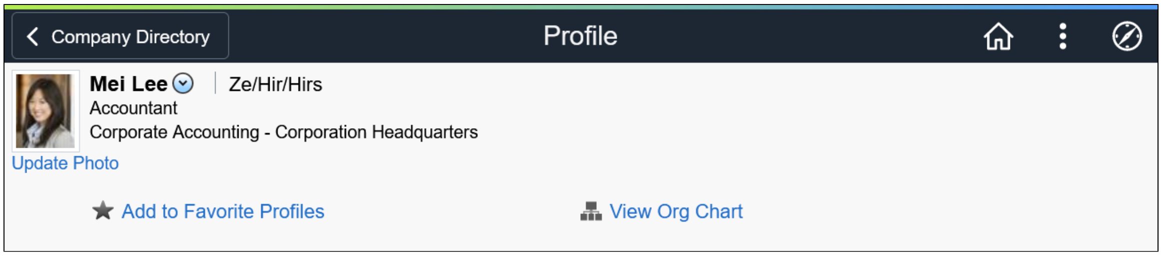
Company Directory Profile Page Layout

The Company Directory - Profile page appears in a multi-panel layout and consists of the following panels and sections:

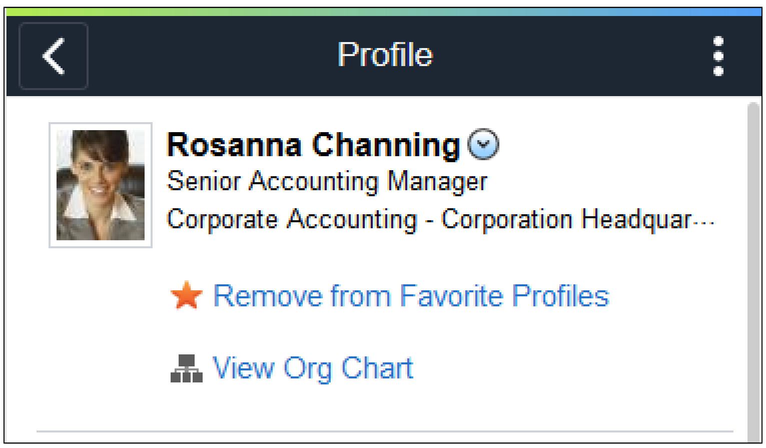
Header

The top of the Profile pages of the Company Directory contains the header. From the header you are able to view a person's name, title, and department, view a person's pronouns if configured to show, access related actions for self service transactions, add or remove the person from your favorite profiles list, and access a graphical representation of the organization.

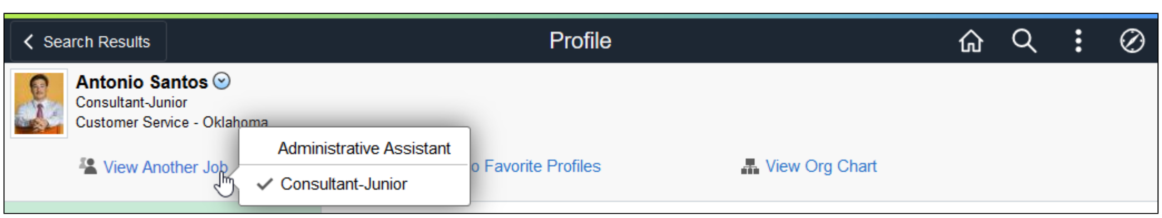
This example illustrates the header of the Profile page.



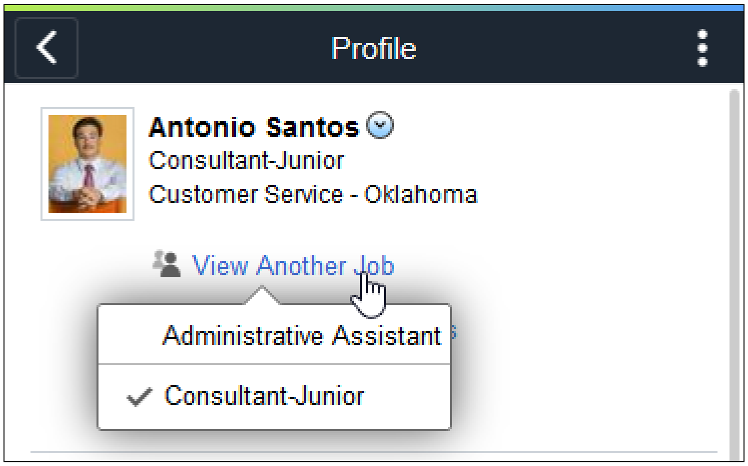
This example illustrates the header of the Profile page for the smartphone.



This example illustrates the header of the Profile page when the person you are viewing holds multiple jobs.



This example illustrates the header of the Profile page when the person you are viewing holds multiple jobs using a smartphone.



Use this panel to perform the following:

Field or Control	***Description***
Related Action Menu icon button	Click this icon next to the employee's name to display a menu of self-service transactions you can access for this person. The list of options will vary based on whether you are accessing your own profile, the profile of one of your employees, the profile of other employees, and your security access.
(pronouns for a person)	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - "HCM Options Page" (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - "Gender Details Page" (PeopleSoft eProfile) in employee self service.

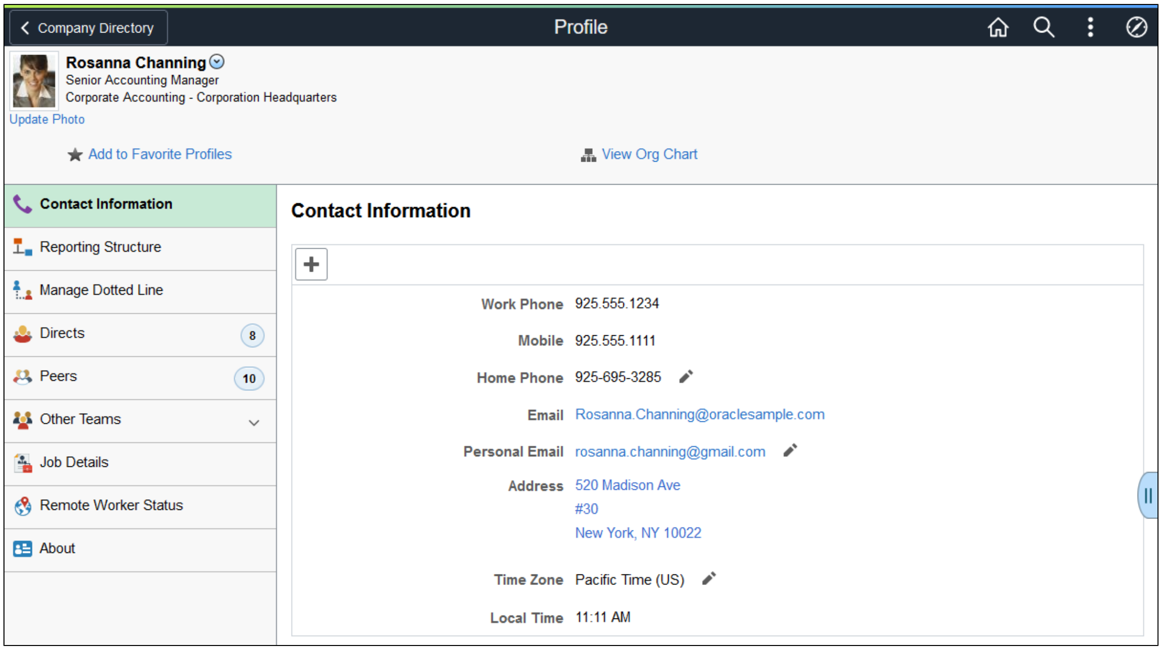
Field or Control	*Description*
Update Photo link	The page will include this link on your own profile if the **Allow Employee to Update Photo** option is enabled on the Installation Table - "HCM Options Page" (Application Fundamentals). Select this link to open the Select Photo page and upload or select an employee photo to display in self-service. See also "Select Photo Page" (PeopleSoft eProfile).
View Another Job	This link is available if an employee holds multiple jobs. Click this link to view the multiple jobs held by this employee. The drop-down menu displays a check mark next to the job you are currently viewing. Select a job to close the menu and view the profile information related to that job.
Add to Favorite Profiles or Remove from Favorite Profiles	Click the star icon and link to add or remove a person from your Favorites list. To see employees in your Favorites list, access the Company Directory Home Page and view the Favorites section.
View Org Chart	Select the **View Org Chart** icon and link to access the Organization Chart Page and view a graphical representation of where the employee fits within the organizational hierarchical reporting structure.

Content Navigation

You will access content differently based on the type of device you are using (large or small form factor).

- (Desktop or Tablet) When using a large form factor device, like a tablet or workstation, the Profile page displays a left navigation panel. This left panel lists the various page categories that make up the employee profile. Click the page name in the left panel to display the content in the right, or main panel.

This example illustrates the layout of the Profile pages for the Company Directory.

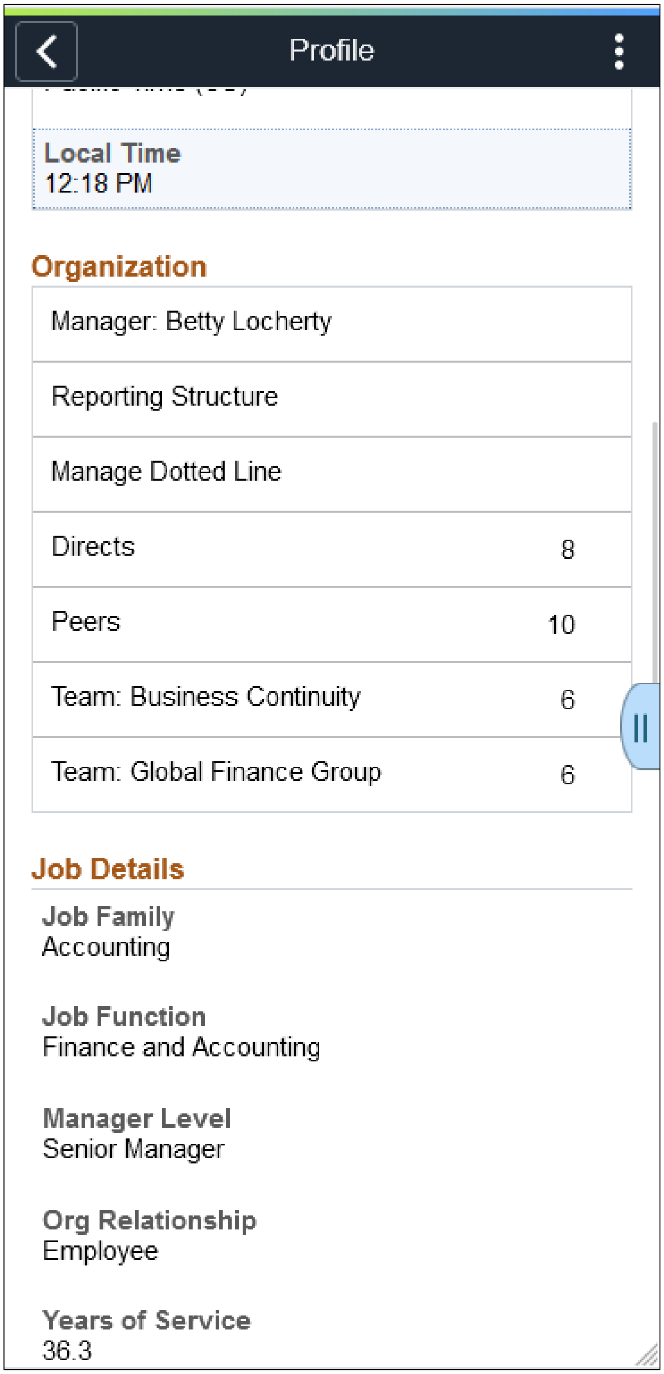


Note: Throughout the remainder of this topic, the page illustrations will show the individual content pages of the Profile pages without the context of the left panel navigation (available when using larger devices). Even though the left navigation panel is not illustrated, remember that the navigation panel appears within the framework of the medium and large form factor pages.

The left panel navigation shows a list of page category tabs and the content that corresponds to the current category appears in the right panel. These category tabs and pages may vary.

- (Smartphone) When using a small form factor device, like a smartphone, content is grouped by sections on the Profile page. You can access additional content by selecting a row within a group box, like within the Organization grid box, clicking an address link, or selecting a Add button on your own profile. The system will direct you to the page content you selected.

This example illustrates the Profile page layout for the Company Directory when using a smartphone.



For more information on using a small form factor device, see the (Smartphone) Profile Page topic.

Profile Content

The main panel displays the employee content. The following topics discuss the employee profile content in further detail:

- (Smartphone) Profile Page

- Profile - Contact Information Page
- Profile - Reporting Structure Page
- Profile - Manage Dotted Line Page
- Profile - Directs Page
- Profile - Peers Page
- Other Teams - <Team Name> Page
- Profile - Job Details Page
- Profile - Remote Worker Status Page
- Profile - Business Partners Page
- Profile - About Page

Note: Rows of data may not apply to all employees.

For medium or larger devices, this information corresponds to the category page you selected in the left panel. For small devices, most of the content is grouped into sections on the same page or you can access additional information by clicking a row, link, or button on the page.

Supplementary Panel

If you use PeopleTools 8.57 or later, the Company Directory - Profile pages include a supplementary slide out panel on the right that provides access to related information and simplified analytics.

These videos demonstrate simplified analytics:

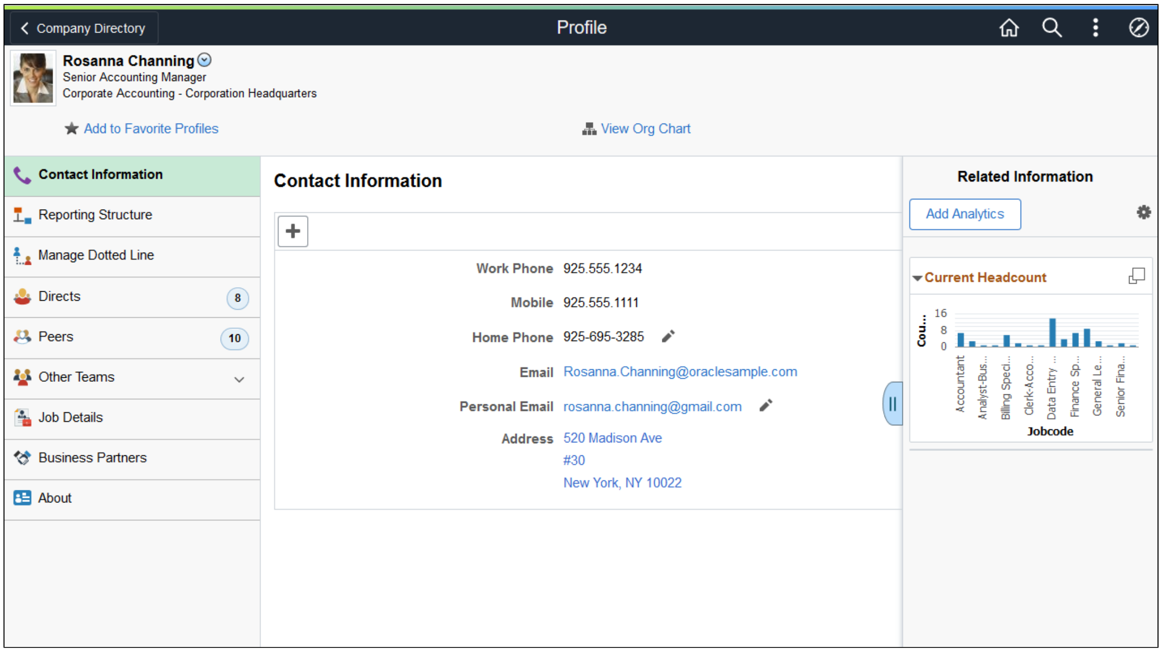
Video: Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics

Video: PeopleSoft Simplified Analytics

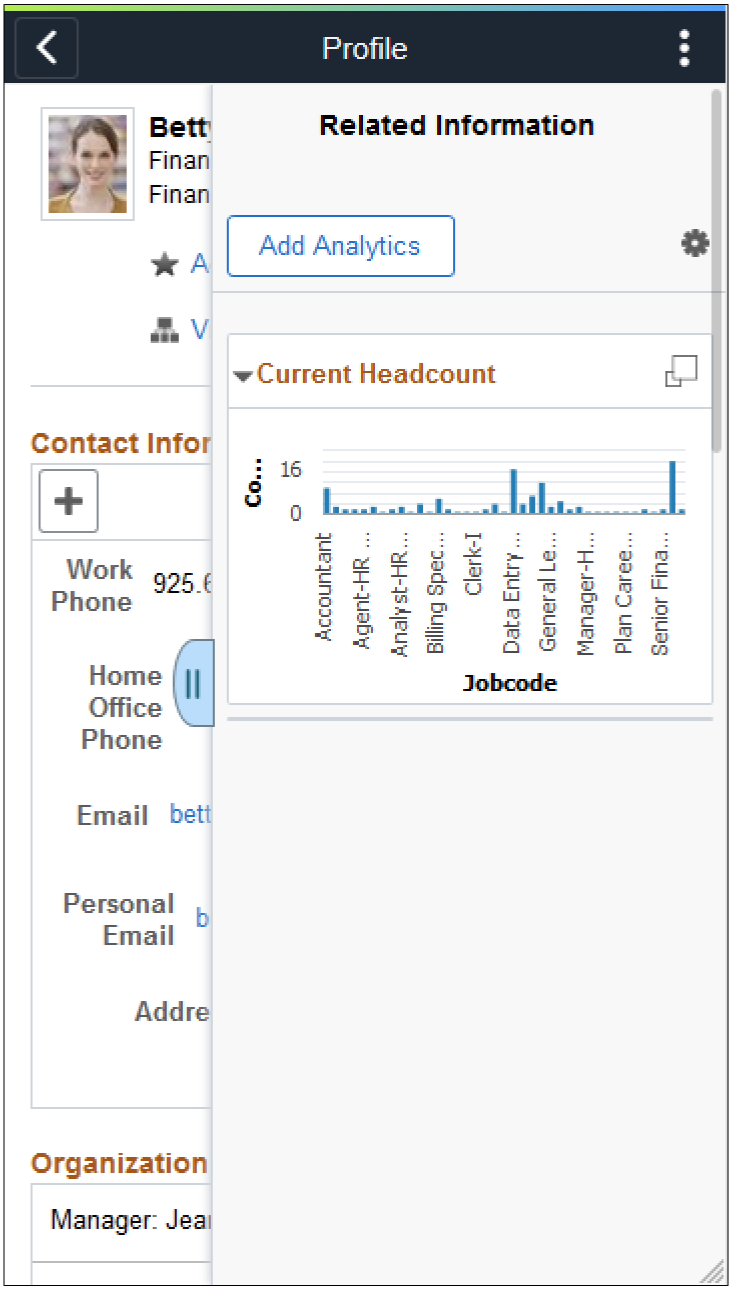
Navigation:

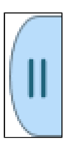
Click the Supplementary Panel tab button from the right side of any Company Directory - Profile page.

This example illustrates the Supplementary Panel options for the Company Directory - Profile page.



This example illustrates the Supplementary Panel options for the Company Directory - Profile page for the smartphone.



Field or Control	Description
 (Supplementary Panel tab button)	Click this tab to open the Related Information panel and view related information.

Field or Control	***Description***
Add Analytics	Click to access the simplified analytics capabilities provided by PeopleTools 8.55 and later. Click the button to create a new chart. When you select to add a new analytic report, the system opens the Create Analytics page where you will use the Analytics Wizard to guide you through the process of creating a new report. The system uses templates based on transaction pages from which you are creating the new report. The templates determine the fields and prompts in the next step of the wizard. The delivered role *PivotGridSuperUser* gives users the ability to create and publish reports.
[Personalize RC (Related Content) icon]	This icon appears at the top of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.
(Display Current Headcount Profile in Modal Window icon)	This icon appears at the top of each individual item in the Related Information panel. Click to expand the item to open a modal dialog with a larger interactive version of the chart.
Related Information	The pane displays the Current Headcount Profile pivot grid chart. This chart is the Simplified Analytics version of the Current Headcount Pivot Grid. Video: Image Highlights, PeopleSoft HCM Update Image 18: Simplified Analytics

For information on how to use the Related Information panel (also known as the Unified Related Content Analytics pane), see *PeopleTools: Pivot Grid*, “Working with Simplified Analytics,” Accessing Simplified Analytics.

(Smartphone) Profile Page

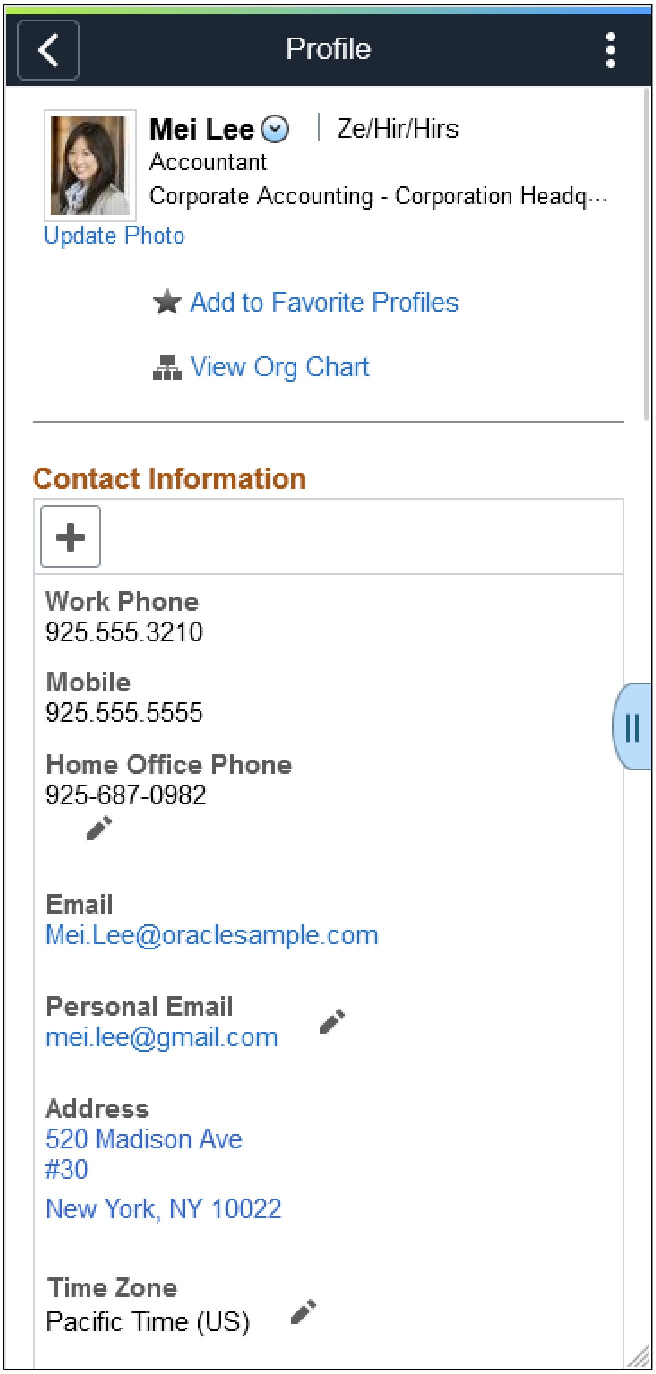
Use the Profile page (HRCD_PROFILE1_FL) from a small form factor to view or access details about a person such as contact information, organizational information, job details, a personal statement, or links this person has added to his or her profile.

Navigation:

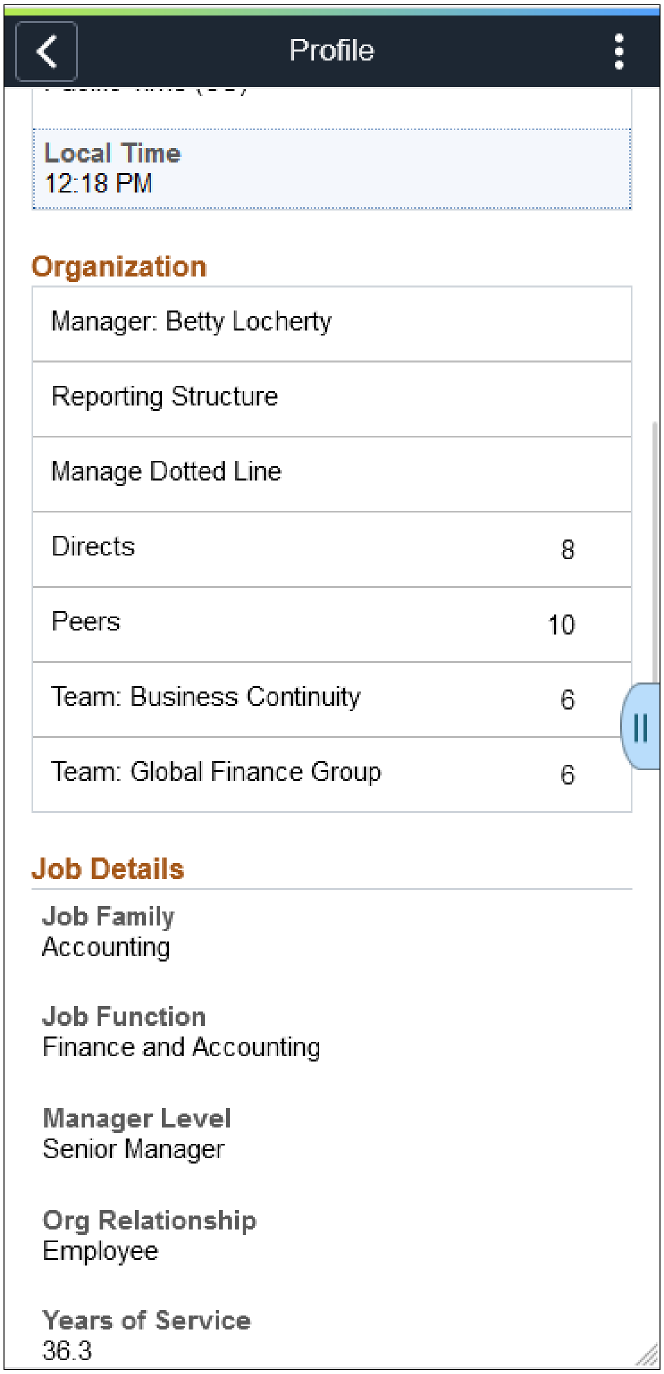
- Click the Company Directory tile on the delivered Employee Self Service or Manager Self Service fluid home page (or any other home page with the tile) on your smartphone.
- Select a person from your favorite profiles, your recently viewed profiles or execute a new search and select a person from the search results.

- Select the View My Profile item from the Actions List icon button in the banner from your smartphone to see your own profile.

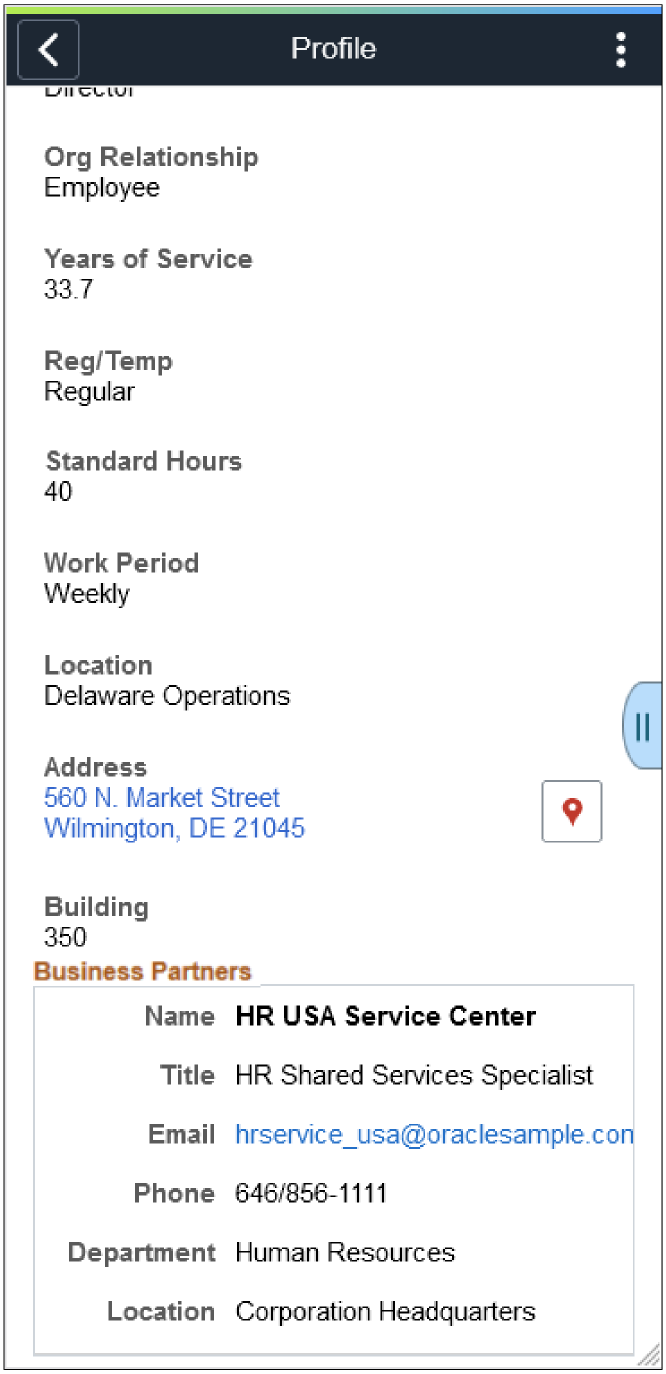
This example illustrates the fields and controls on the Profile page (1 of 4) for the smartphone.



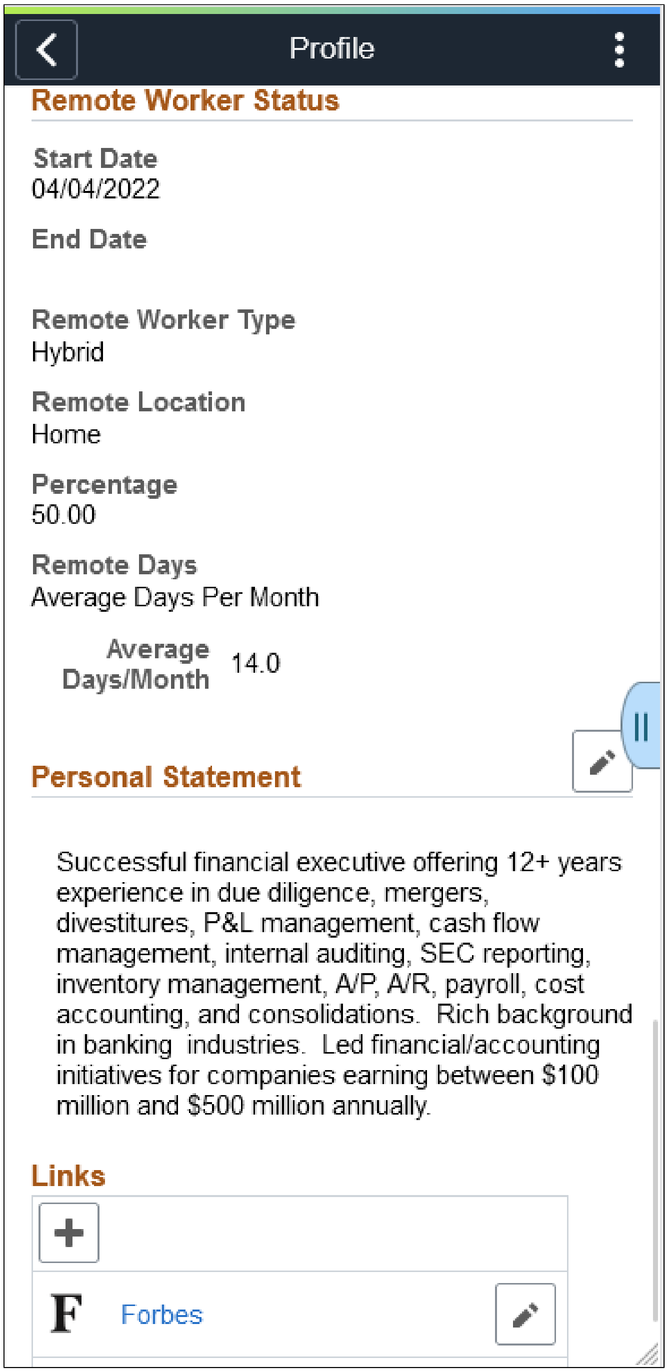
This example illustrates the fields and controls on the Profile page (2 of 4) for the smartphone.



This example illustrates the fields and controls on the Profile page (3 of 4) for the smartphone.



This example illustrates the fields and controls on the Profile page (4 of 4) for the smartphone.



When you access the Company Directory from a smartphone, all the employee's profile data is presented on this one page.

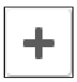
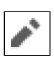
The page is set up to display the following sections:

Contact Information

Use this section to view contact information such as phone numbers, emails, and work location details.

Note: The Contact Information page is designed to show content grouped in the following order:
1. Phone numbers
2. Emails
3. Address
4. Other
The fields that automatically appear in this section, and their sequencing within these groups, are based on the setup configuration determined on the Chart and Profile Settings - Profile Content Page for the *Company Directory Fluid* org view type. For example, Contact Information will display all phone numbers first. Phone numbers will appear in the sequence order defined in the setup, when available in Personal Data, and then list those numbers the employee manually added within the Company Directory. After phone numbers, the page will show email addresses, using the same logic, and so forth.

See also Address Page.

Field or Control	***Description***
 **Add Contact Information** button	This button is available on your own profile only. Click this button to access the Add Contact or Edit Contact Page and enter more contact information.
Address link	Select this link to access the Address Page and view the location on a map. **Note:** Your organization will need to have licensed and enabled Oracle Maps Service for PeopleSoft on the Installation Table - “Third Party/System Page” (Application Fundamentals), otherwise this button will not appear on the page.
 **Edit** icon	This icon is available on your own profile only for items you have added. Click this button for one of the existing contact details to update or delete the contact information.

To view similar information using a large form factor device, see Profile - Contact Information Page.

Organization

Use this section to view an employee’s manager, reporting structure, dotted line, direct reports, peers, and teams to which you have access.

Note: Rows of data may not apply to all employees.

Field or Control	***Description***
Manager: <manager name>	Select this row to view the profile data of this person's manager. **Note:** If the Manager position is identified as an *Empty Position*, you will not be able to access the profile pages. Profile pages display the information for a person.
Reporting Structure	Select this row to access the Profile - Reporting Structure Page and see the reporting structure of the person you are viewing.
Manage Dotted Line	Select this row to access the Profile - Manage Dotted Line Page and see, add, or removed dotted line relationships, if applicable.
Directs	Select this row to access the Profile - Directs Page and see the direct reports and dotted line reports of the person you are viewing. If this person does not have direct reports but has dotted line reports, this row will still appear but only show the information of dotted line reports. However, if the person has neither direct or dotted line reports, this row will not appear.
Peers	Select this row to access the Profile - Peers Page and see the peers of the person you are viewing. If this person does not have peers, this row will not appear.
Team: <team name>	Select this row to access the Other Teams - <Team Name> Page and view a list of members of the specified team with which this person is associated. This row will not be available if the person you are viewing is not associated with any team to which you have been given access.

Job Details

Use this section to view company and job details about a person.

See also Profile - Job Details Page.

Business Partners

Use this section to view business partner contact information for this individual. If no business partners are available, this section is hidden.

Note: The Business Partners configuration determines the number of business partners that are available for viewing. When there are no business partners to view, the Profile page will hide the Business Partners section if the person you are viewing is not associated with a business partner team or if the team is not configured to display on the Company Directory.
For configuration set up, see the Configuring Business Partners topic and Configure Business Partner Page.

Field or Control	***Description***
View Profile button	Select the **View Profile** button on a business partner contact row to access the Profile page of that individual. The View Profile button is not available for an alternate contact business partner type since there is no person profile data for this contact type.

See also Profile - Business Partners Page.

Remote Worker Status

Use this section to view a person's remote worker details. If a person does not have remote work request, this section will not appear on the page.

See also Profile - Remote Worker Status Page.

Personal Statement

Use this section to view a personal statement a person has added to their profile. If you are on your own profile, use the **Add Personal Statement** or **Edit** buttons to access the Personal Statement Page and add, update, or delete a personal statement or comment on your profile.

See also Profile - About Page

Links

Use this section to view links a person has added to their profile. If you are on your own profile, use the **Add** or **Edit** buttons to access the Personal Statement Page and add, update, or delete a link on your profile.

See also Profile - About Page

Profile - Contact Information Page

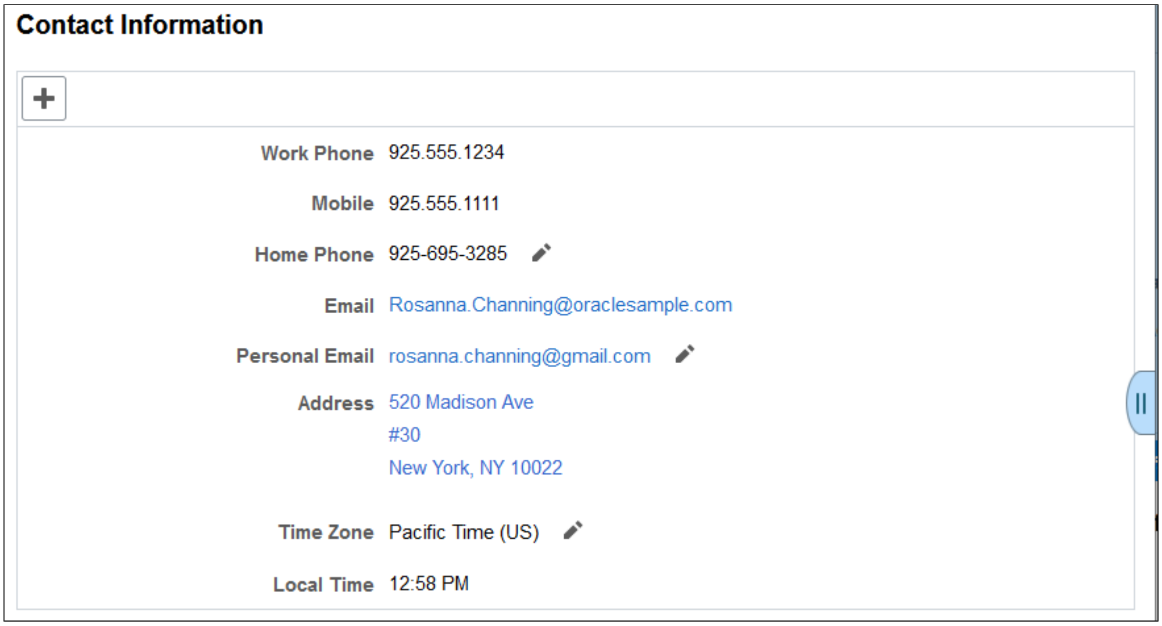
Use the Profile - Contact Information page (HRCD_PROFILE1_FL or HRCD_PROFILE4_FL) from a large form factor to view contact information such as phone numbers, emails, and location details.

Navigation:

- Click the Company Directory tile on the delivered Employee Self Service or Manager Self Service fluid home page (or any other home page with the tile). Then, select a person from your favorite profiles, your recently viewed profiles or execute a new search and select a person from the search results.

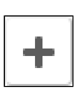
- Select the View My Profile item from the Actions List icon button in the banner to view your own profile.
- Click the Contact Information tab in the left panel of the Profile page.

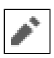
This example illustrates the fields and controls on the Profile - Contact Information page.



This panel displays contact information, such as phone numbers, email addresses, and the work location.

Note: The Contact Information page is designed to show content grouped in the following order:
1. Phone numbers
2. Emails
3. Address
4. Other
The fields that automatically appear on this page, and their sequencing within these groups, are based on the setup configuration determined on the Chart and Profile Settings - Profile Content Page for the *Company Directory Fluid* org view type. For example, Contact Information will display all phone numbers first. Phone numbers will appear in the sequence order defined in the setup, when available in Personal Data, and then list those numbers the employee manually added within the Company Directory. After phone numbers, the page will show email addresses, using the same logic, and so forth.

Field or Control	***Description***
 **Add Contact Information** button	This button is available on your own profile only and additional contacts must be enabled on the Chart and Profile Settings - Profile Content Page. Click this button to access the Add Contact or Edit Contact Page and enter more contact details to your own profile.

Field or Control	***Description***
Address link	Click the address link to access the Address Page and view the location on a map. **Note:** Your organization will need to have licensed and enabled Oracle Maps Service for PeopleSoft on the Installation Table - “Third Party/System Page” (Application Fundamentals), otherwise this button will not appear on the page.
Time Zone and **Local Time**	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. For your own profile, select the edit button to make updates to your time.
 **Edit** icon	This icon is available on your own profile. This icon will appear for the following. • Contact items that you have added, not the ones that are based on the setup configuration. Also, the **Additional Contacts** option must be enabled on the Chart and Profile Settings - Profile Content Page. Click this icon for one of the existing contacts to access the Add Contact or Edit Contact Page and update the contact information. • The time zone, when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Click this icon next to the **Time Zone** field to access the Edit Time Zone Page to make updates to your time zone and local time.

To view this content on a smartphone, see (Smartphone) Profile Page.

Address Page

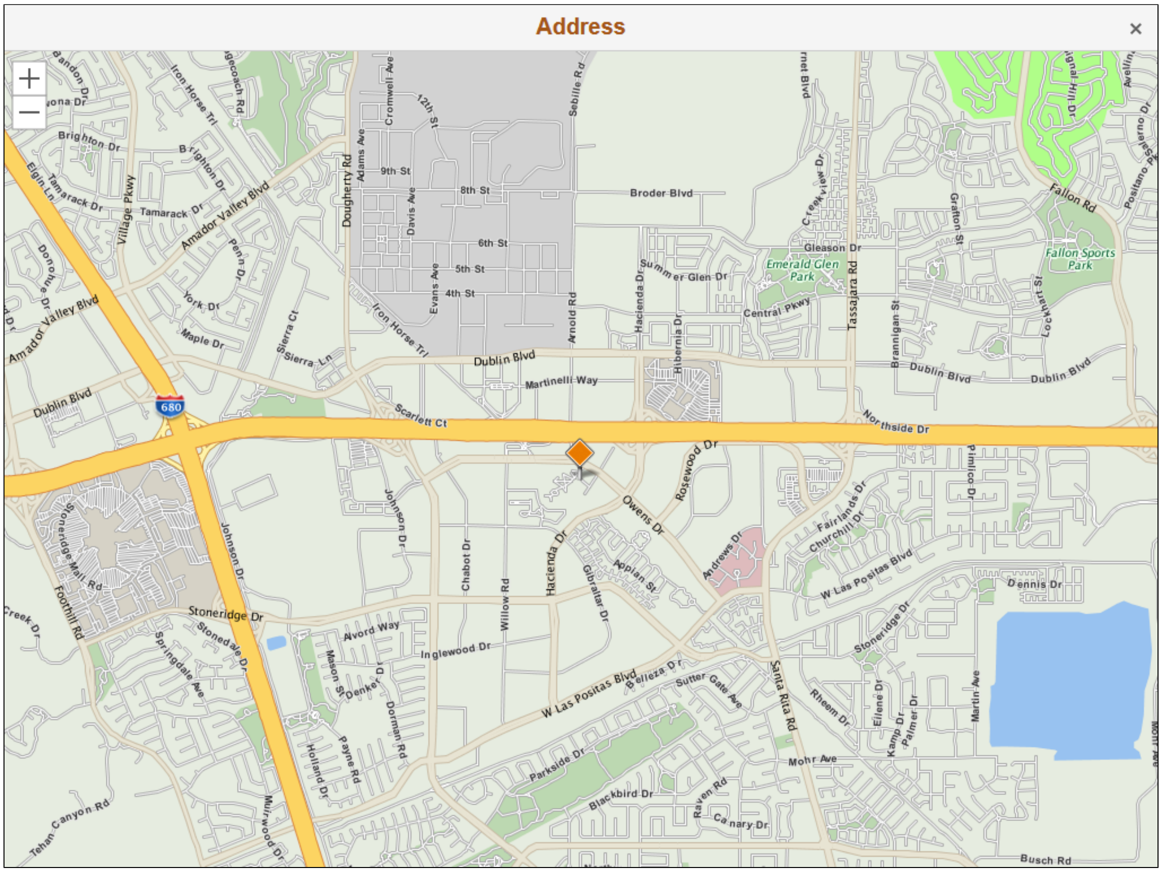
Use the Address page (HR_ADDR_MAP_FL) to view the employee’s location on a map.

Note: Your organization will need to have licensed and enabled Oracle Maps Service for PeopleSoft on the Installation Table - “Third Party/System Page” (Application Fundamentals) to see the button and view the map.

Navigation:

Click the **Address** link on the Company Directory - Profile pages.

This example illustrates the Address page.



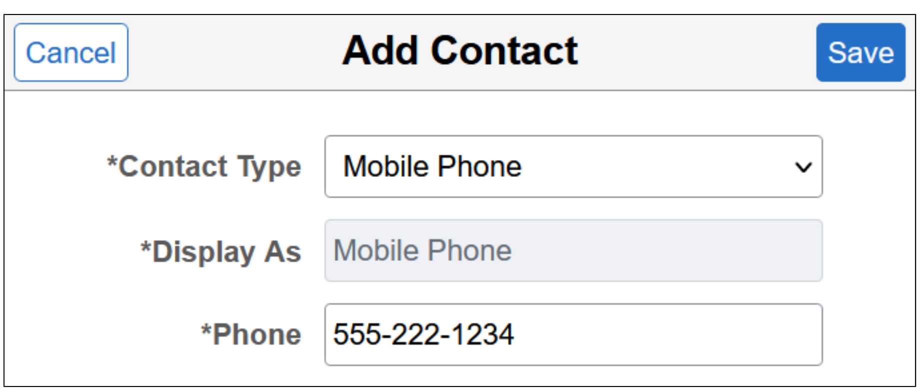
Add Contact or Edit Contact Page

Use the Add Contact or Edit Contact page (HRCD_PRFOILE1_SCF) to add, update, or delete additional contact information on your personal profile, such as home phone number, mobile, or email addresses.

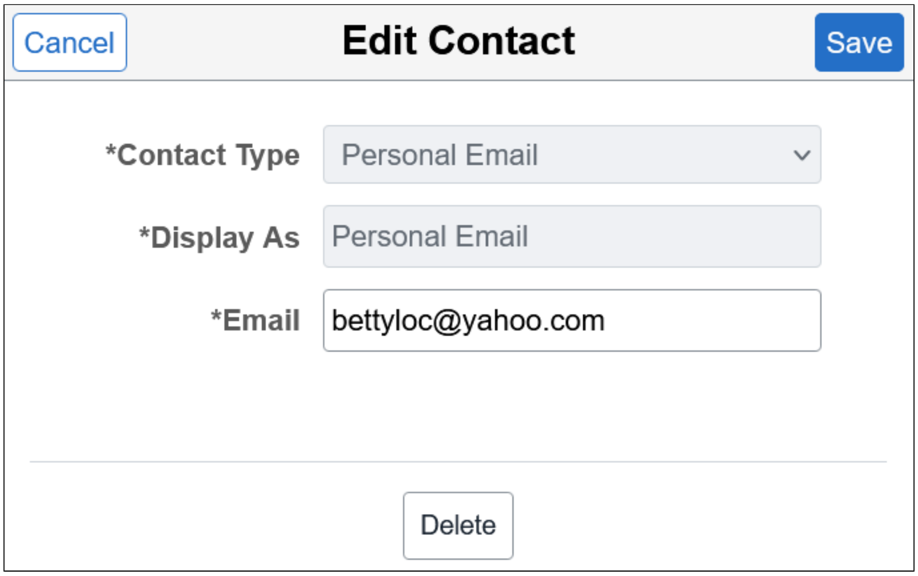
Navigation:

- Click the **Add Contact Information** (+) button within the contact section of your own profile.
- Click the **Edit** (pencil) icon for additional contact rows within the contact section of your own profile.

This example illustrates the fields and controls on the Add Contact page.



This example illustrates the fields and controls on the Edit Contact page.



Field or Control	***Description***
Cancel	Click to cancel any changes you have made to this contact type.
Contact Type and **Display As**	Select a contact type, such as a phone number or email. Valid options are defined on the Additional Contact Types Page. The label for that contact type will appear in the **Display As** field.
Phone, **Email**, or **Email/Phone**	Enter the contact information, such as the exact phone number or email address.
Delete	This button is available on the Edit Contact page when you are updating an existing contact. Select to remove this contact from your contact list.
Save	Click to save your information and have it display on your profile in the Company Directory.

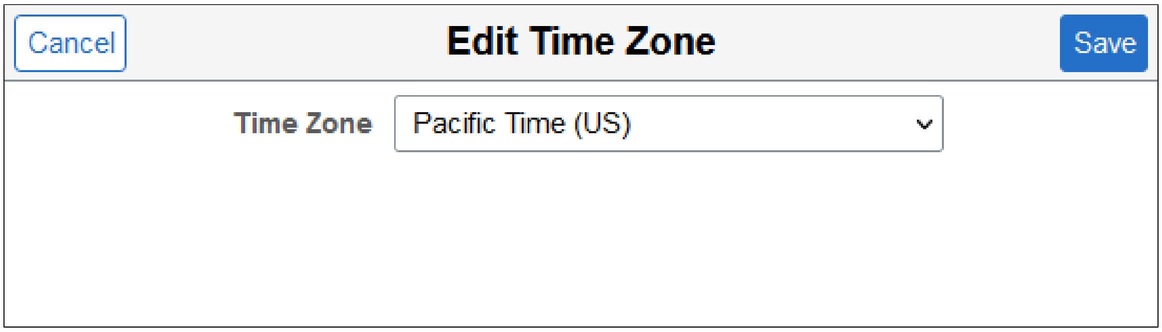
Edit Time Zone Page

Use the Edit Time Zone page (HRCD_PROFILETZ_SCF) to enter the time zone for where you work.

Navigation:

Click the **Edit** (pencil) icon for **Time Zone** field within the contact section of your own profile.

This example illustrates the fields and controls on the Edit Time Zone page.



Field or Control	*Description*
Cancel	Click to cancel any changes you have made to this contact type.
Time Zone	Select your time zone so others can see you local time.
Save	Click to save your information and have it display on your profile in the Company Directory.

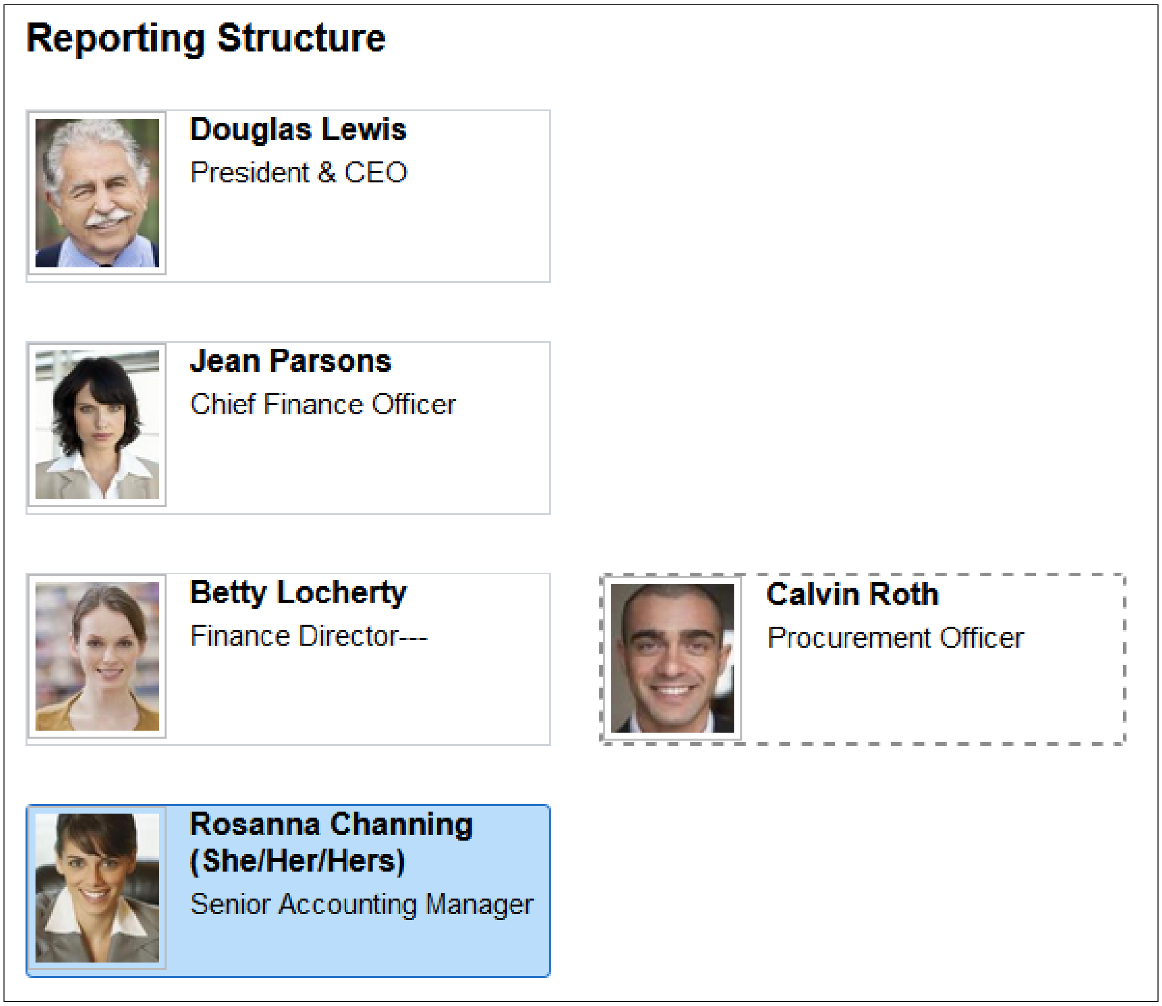
Profile - Reporting Structure Page

Use the Profile - Reporting Structure page (HRCD_PROFILE1_FL, HRCD_PROFILE4_FL, or HRCD_PROFILE2_FL) to view the reporting structure for the person whose profile you are accessing.

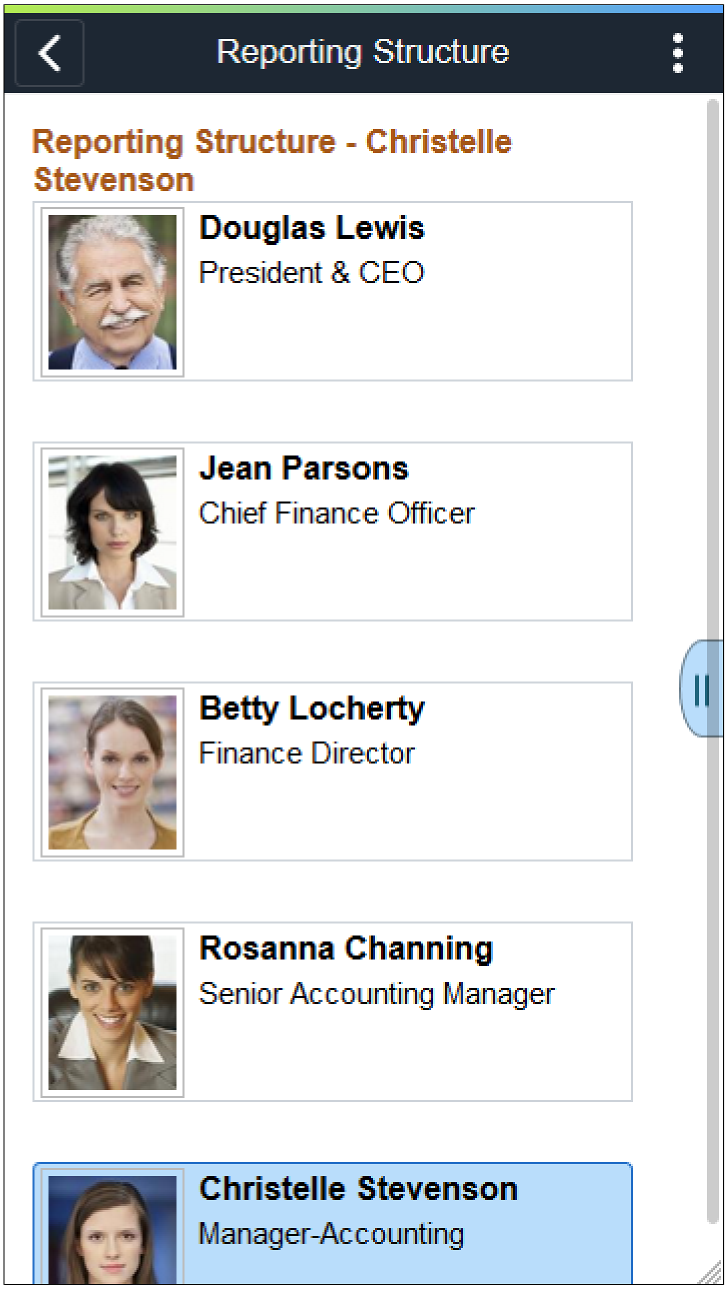
Navigation:

- Select the Reporting Structure tab in the left panel of the Profile page when using a large form factor device.
- Select the Reporting Structure row on the Profile page when using a small form factor device.

This example illustrates the fields and controls on the Profile - Reporting Structure page.



This example illustrates the Profile - Reporting Structure page for the smartphone.

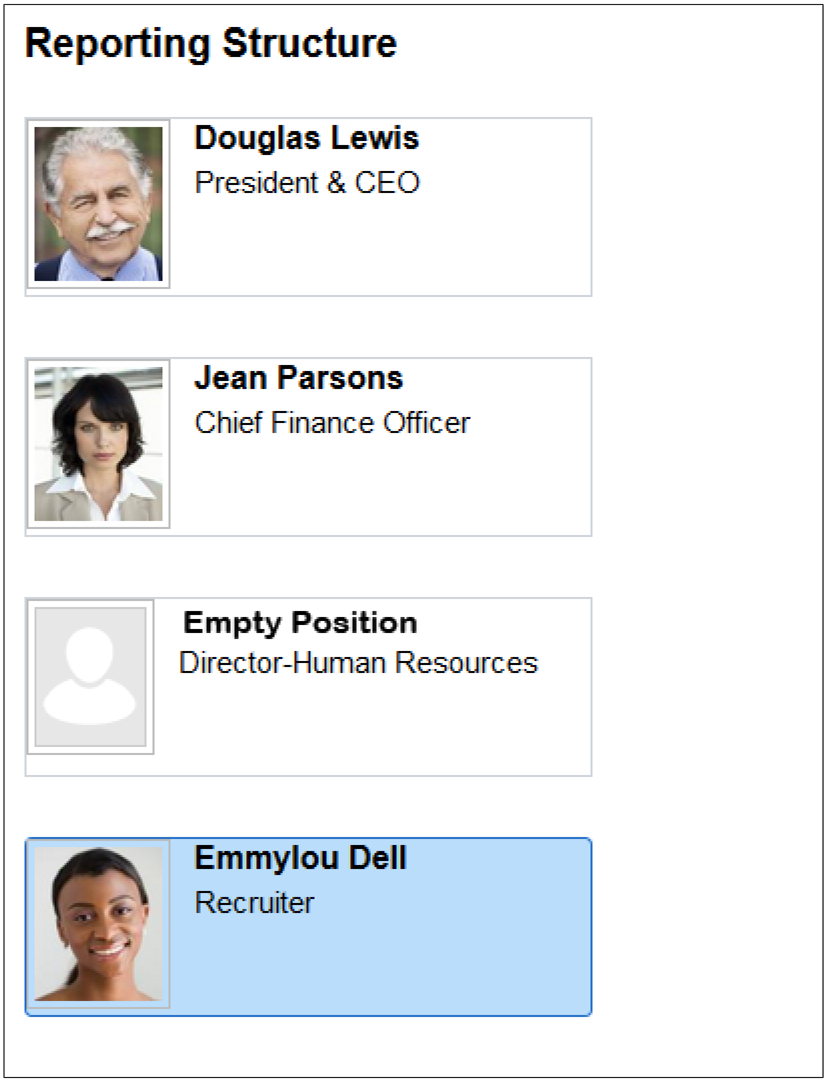


Select an employee node box to access that person's profile.

Viewing Empty Positions

When you have enabled partial or full position management, the Company Directory tree was built with a method that uses positions, and you select to include empty position, empty positions will display in the reporting structure.

This example illustrates the Profile - Reporting Structure page when the structure displays an empty position.



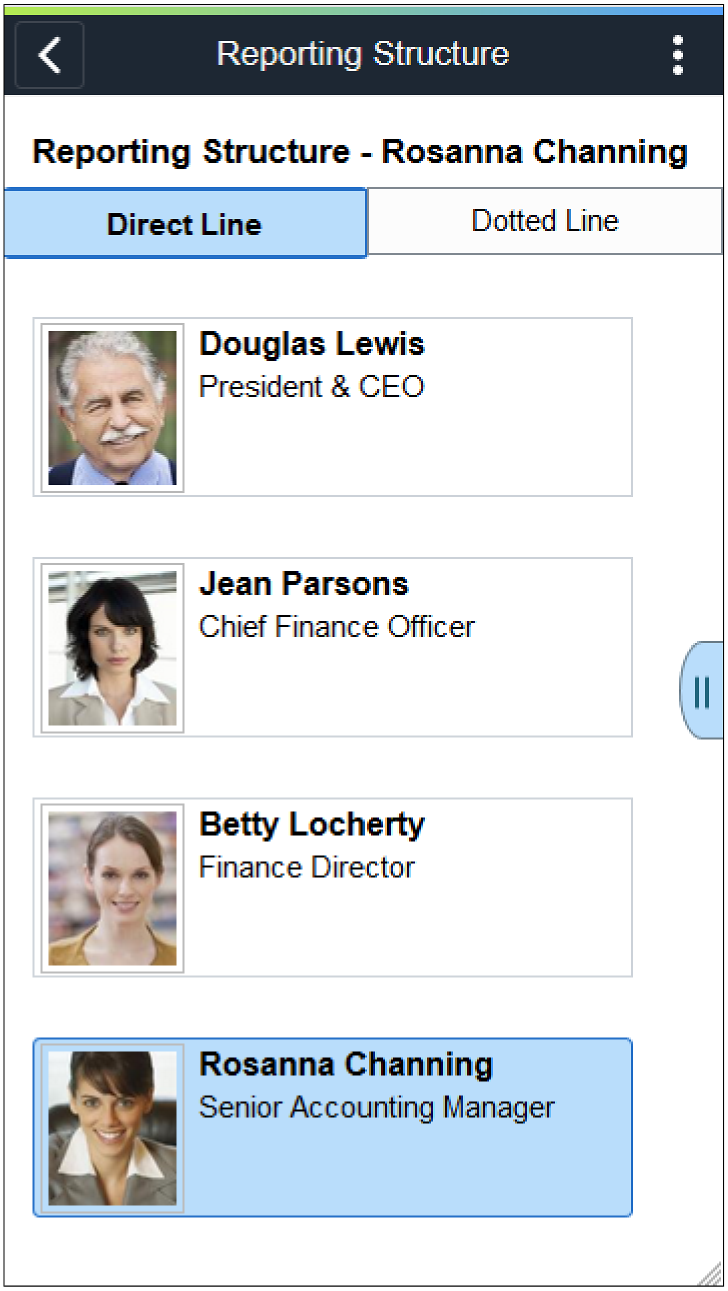
Node boxes that are vacant positions display the text *Empty Position* and the position title. When the **Show Empty Position Number** check box is selected on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type, the position number will also appear in the node. You cannot select and view the profile data of an empty position node since there is no person currently associated with that position.

For more information on building Company Directory trees using positions, see the Understanding the Org Chart Viewer and Company Directory Setup Steps and Tree Builder Run Control Page documentation.

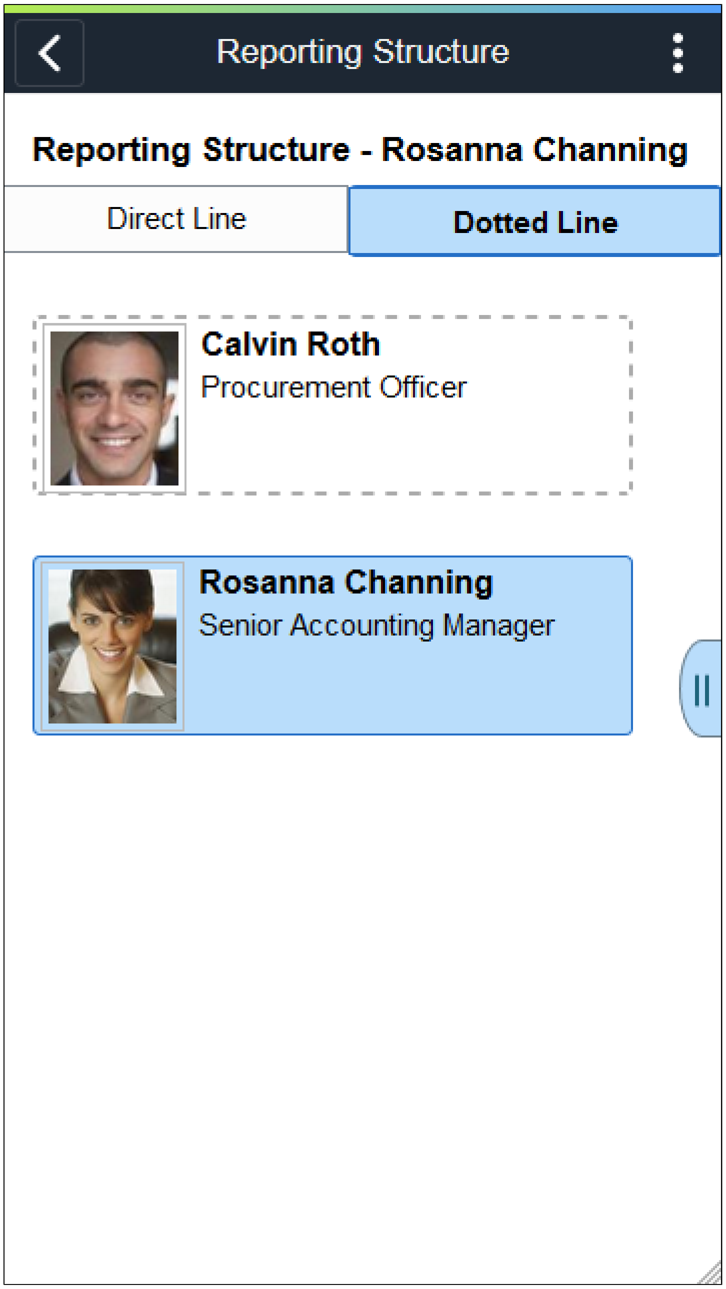
Having a Dotted Line Manager

When a person reports to a dotted line manager, the pages will also show that relationship. While it displays directly on the larger screens, the small form factor devices display a Direct Line and Dotted Line tab to view the different types of reporting.

This example illustrates the Reporting Structure: Direct Line page for the smartphone when a person reports to one or more dotted line managers.



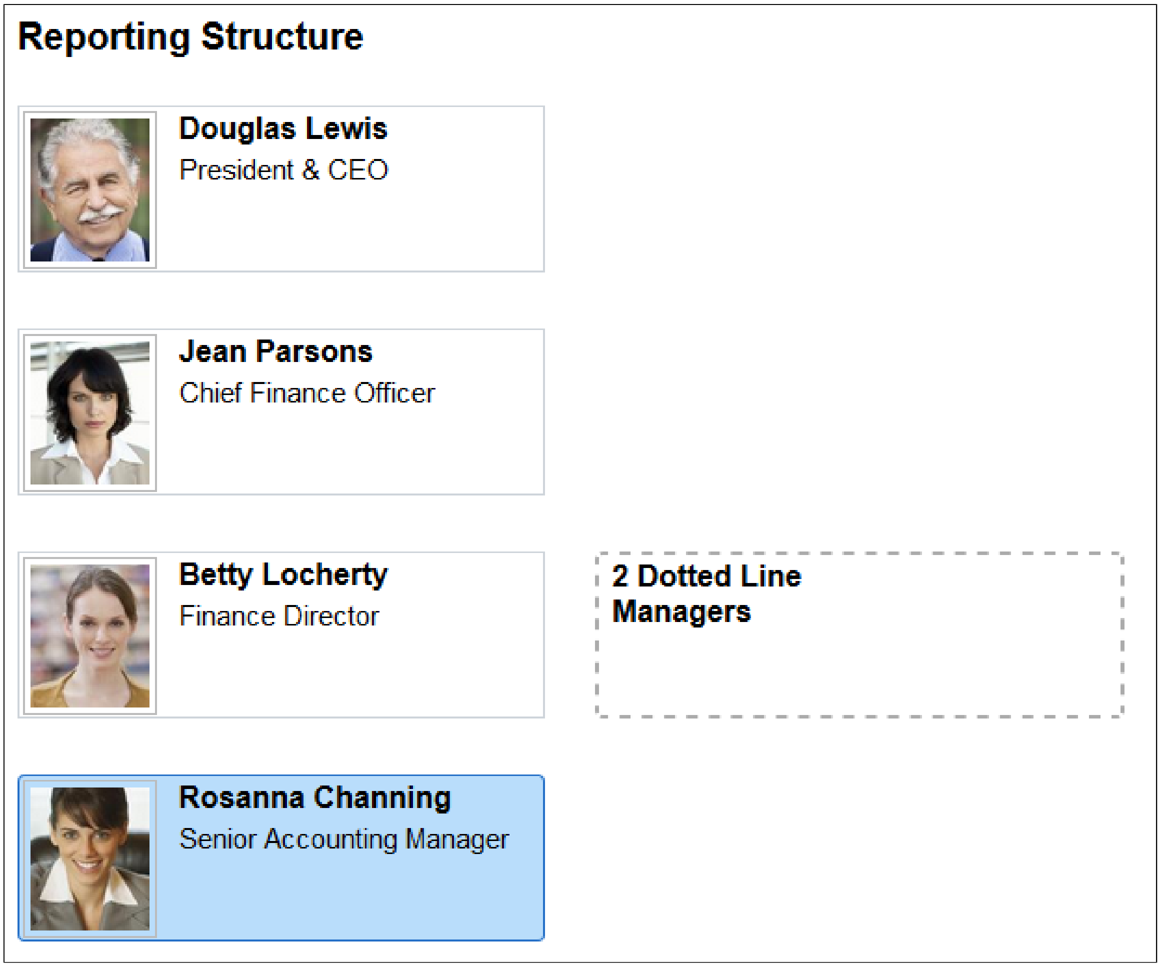
This example illustrates the Reporting Structure: Dotted Line page for the smartphone when a person reports to one or more dotted line managers.



Having More than One Dotted Line Manager

When a person reports to more than one dotted line manager, the pages will also show that relationship. While it displays directly on the small form factor Reporting Structure: Dotted Line page, the large form factor displays the number of dotted line managers for that person and then a secondary page, <Number> Dotted Line Managers Page, to view dotted line managers.

This example illustrates the Reporting Structure page when a person reports to more than one dotted line manager.



Field or Control	***Description***
<number> Dotted Line Managers	This box displays the number of dotted line managers for this employee. Click the box to access the <Number> Dotted Line Managers Page and view the dotted line managers for this person.

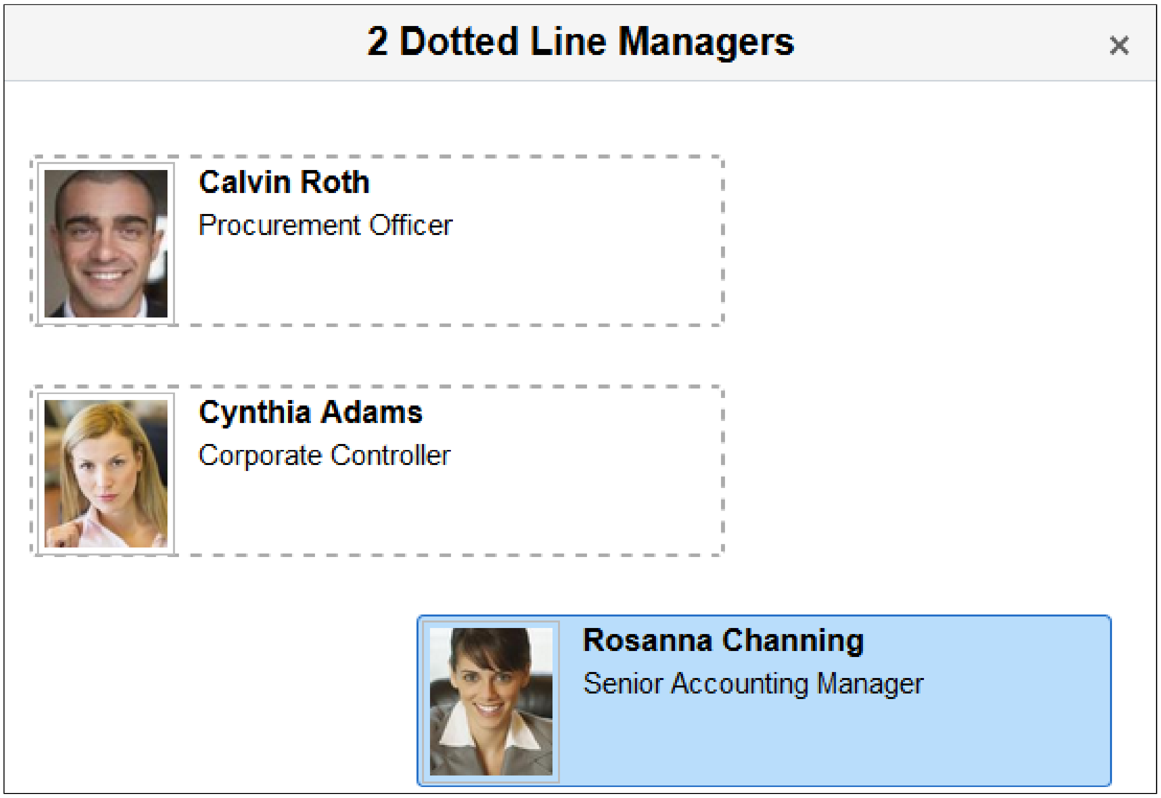
<Number> Dotted Line Managers Page

Use the <Number> Dotted Line Managers page (HRCD_DOT_LINE_SCF) to view the dotted line managers for a person.

Navigation:

Click the <Number> Dotted Line Managers box from the Profile - Reporting Structure Page when a person reports to more than one dotted line report.

This example illustrates the <Number> Dotted Line Managers page.



Select an employee node box to access that person's profile or cancel out of the page to return to the Profile - Reporting Structure Page.

Profile - Manage Dotted Line Page

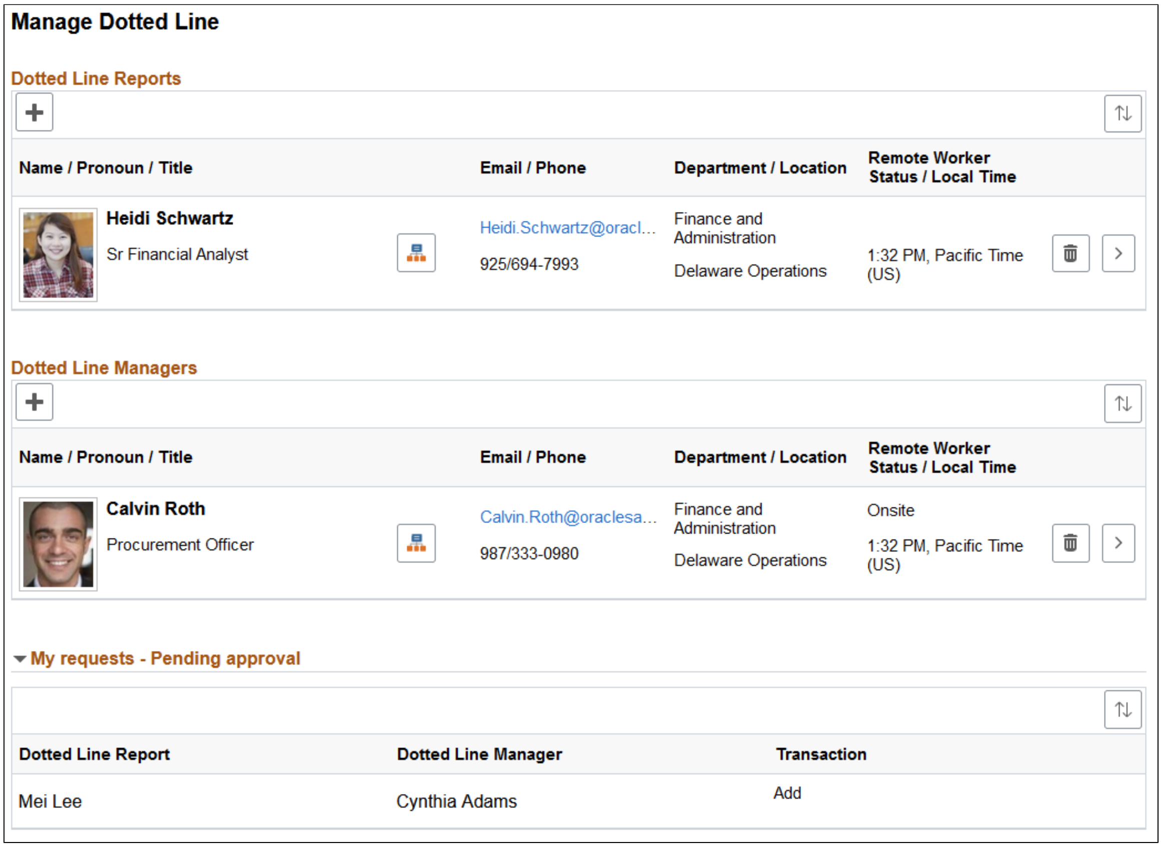
Use the Profile - Manage Dotted Line page (HRCD_PROFILE1_FL or HRCD_PROFILE5_FL) to create or remove dotted line reporting relationships for a person.

Navigation:

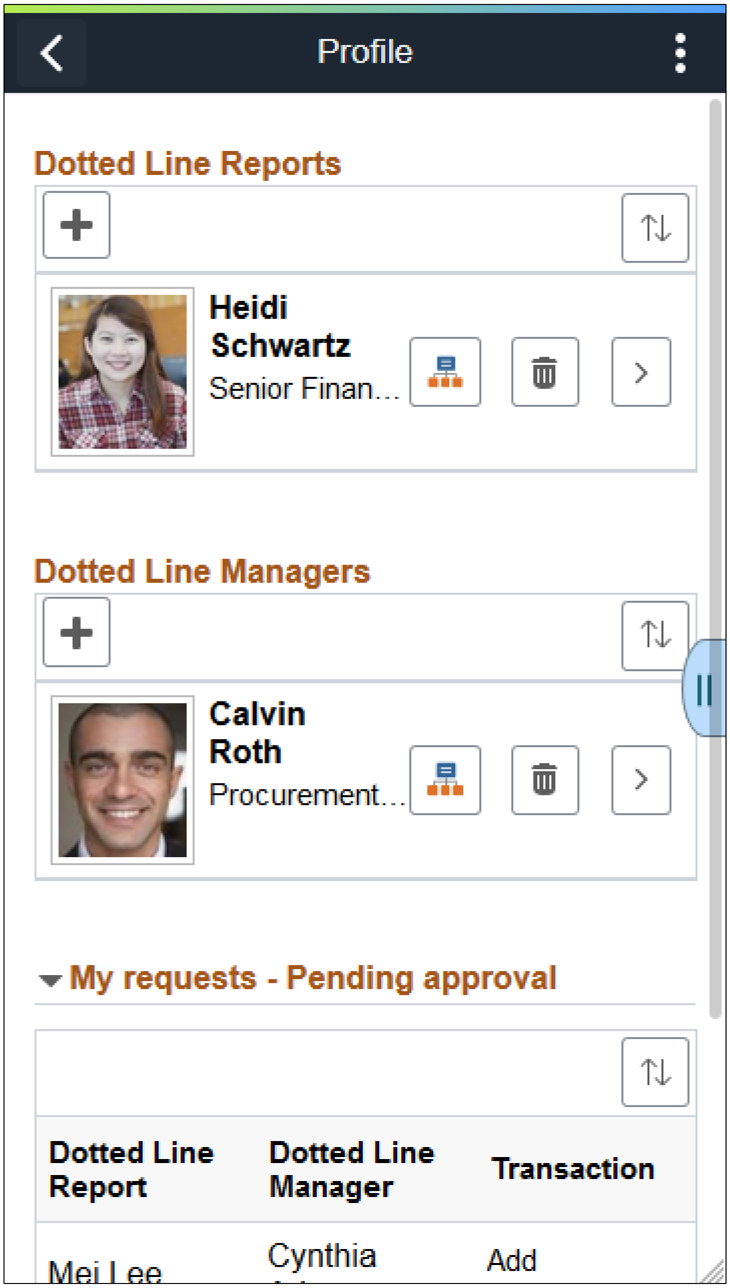
- Select the Manage Dotted Line tab in the left panel of the Profile page when using a large form factor device.
- Select the Manage Dotted Line row on the Profile page of an employee when using a small form factor device.

Note: The Profile page will not display the Manage Dotted Line tab or row when you have not been granted the role to manage dotted line relationships for this person. Valid roles for dotted line management are specified on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type.

This example illustrates the fields and controls on the Profile - Manage Dotted Line page.



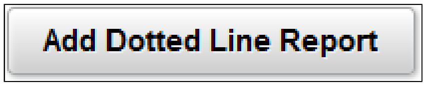
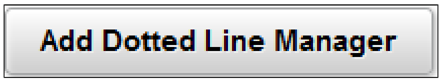
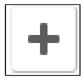
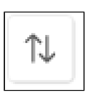
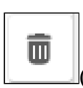
This example illustrates the fields and controls on the Profile -Manage Dotted Line page for a smartphone.



Use this page to view and manage dotted line reports and managers for the person you are viewing.

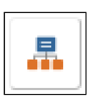
When viewing a profile for yourself or one of your direct line reports and granted the *Dotted Line* role, the page will display the buttons to add or remove people from this person's dotted line reporting structure.

If you do not have access to create dotted line relations for a person, then this page will not be available.

Field or Control	***Description***
 **Add Dotted Line Report** ,  **Add Dotted Line Manager** or  (Add) buttons	This button is available when you have been granted the role to manage this person's dotted line relationships. Click this button to access the Person Search Page and add a person to as a dotted line report or manager for the person on whose profile you have accessed. The first time you add individuals as a dotted line report or manager, the page will display the add button showing the text. When individuals already exist for these categories, the page will display the plus (+) button. In order to create dotted line relationships, consider the following: • The system will not allow you to enter a dotted line relationship where a direct reporting structure is already in place. For example, a manager cannot be assigned as a dotted line manager to one of his or her own direct line reports. • A direct line report cannot be added as a dotted line manager to his or her own direct line manager. • The dotted line report and dotted line manager cannot be the same person. • You cannot enter duplicate dotted line relationships. **Note:** When adding a dotted line relationship, the system will send an approval request to the approving manager and an email notification to the dotted line report and dotted line manager, notifying them that a dotted line relationship is being requested to be created. The system will also copy the direct line manager of these individuals on the email.
 (Sort) button	Click this button to access a list of field descriptions you can use to sort the individuals. This sort will remain in effect until you change the sort order or leave the Profile pages for this person.
(Remove Dotted Line Report) button	This button is available when you have been granted the role to manage this person's dotted line relationships. Click this button to remove an individual from this person's dotted line reporting structure. **Note:** When removing a dotted line relationship, the system will send an approval request to the approving manager and an email notification to the dotted line report and dotted line manager, notifying them that a dotted line relationship is being requested to be removed. The system will also copy the direct line manager of these individuals on the email.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 47 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

These are common fields on this page.

Field or Control	***Description***
Name	Displays the person's name.
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - “HCM Options Page” (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - “Gender Details Page” (PeopleSoft eProfile) in employee self service.
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.

Field or Control	*Description*
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
> (View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

My requests - Pending approval

Note: The **My requests - Pending approval** section is visible only on the page of the requester, or initiator. It does not appear on the page for the persons for whom you are making the request.
The **My requests - Pending approval** section also does not appear on the page if you do not have pending requests.

When you add or remove a dotted line relationship using your own direct reports, the system will automatically add the person to the Dotted Line page. However, if the person reports to another manager, it will first send an approval request to that manager. After the request has been approved, the relationship will appear on the person's Profile - Dotted Line page. To see the requests you have submitted that have not been approved, access your own profile and expand the **My requests - Pending approval** section.

See also Using Fluid Approvals to Approve Dotted Line Relationships.

Adding Dotted Line Relationships as an Administrator

Administrators also have the capability to view and create dotted line relationships. For more information on this, see Managing HR Administration Tasks as an Administrator Using Fluid and Managing Dotted Line Relationships as an Administrator.

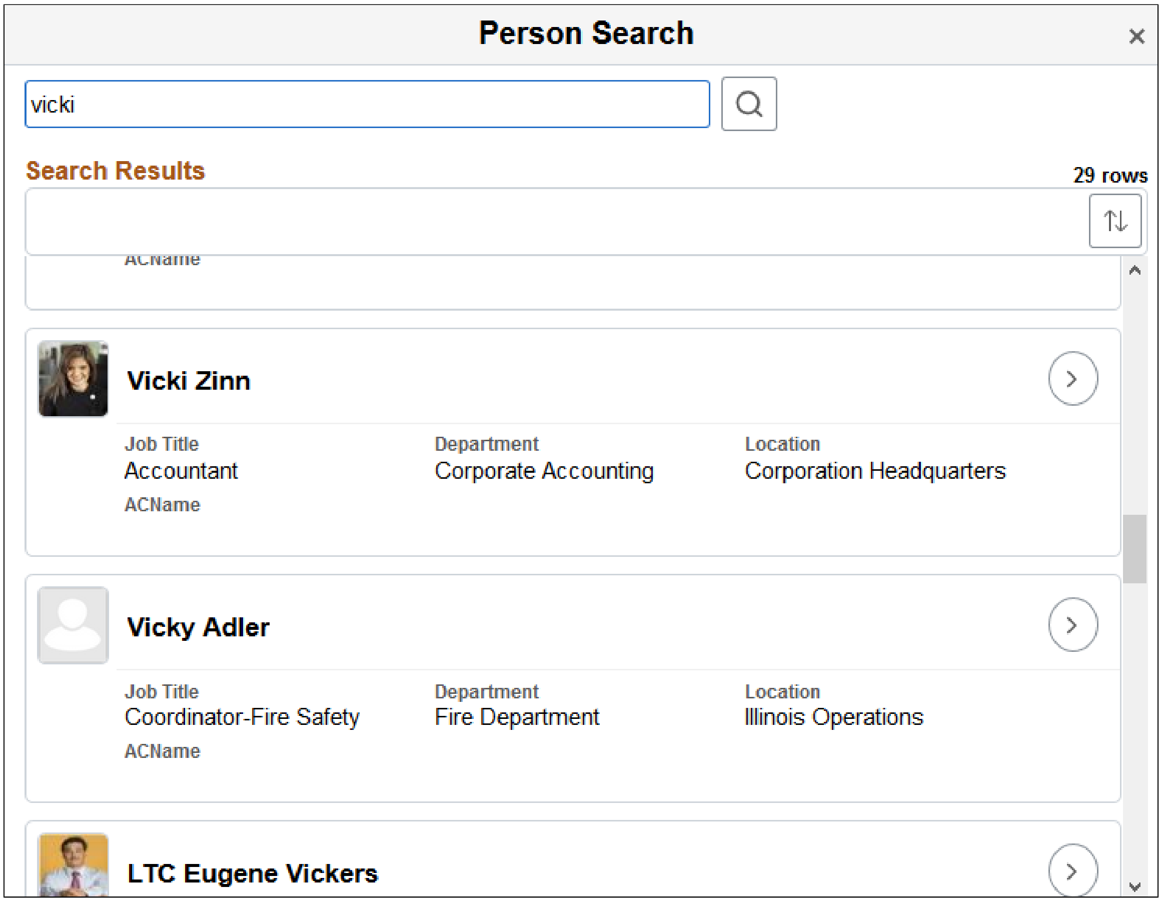
Person Search Page

Use the Person Search page (HR_PSEL_FLU) to search for and select a person as a dotted line report or dotted line report manager for this person.

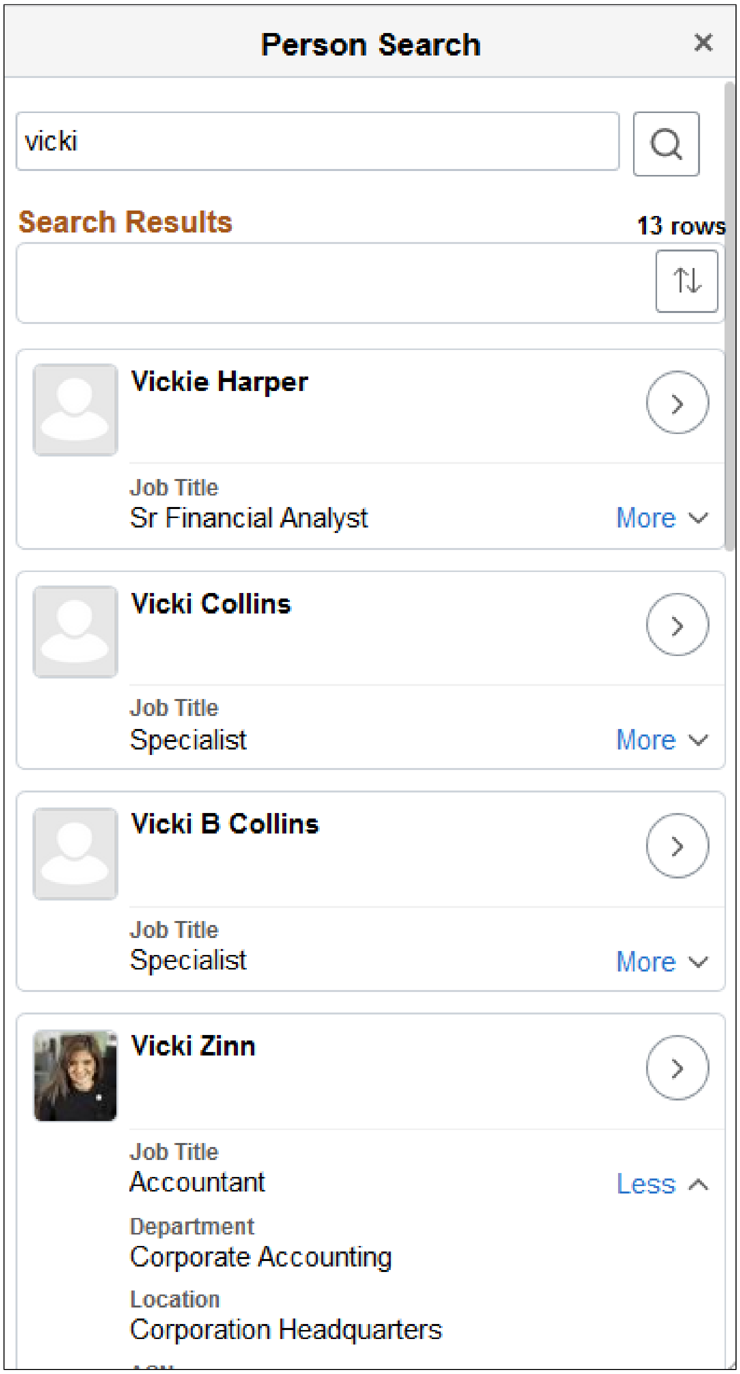
Navigation:

Select the **Add Dotted Line Report** or **Add Dotted Line Manager** buttons from the Profile - Manage Dotted Line Page.

This example illustrates the fields and controls on the Person Search page.



This example illustrates the fields and controls on the Person Search page for the smartphone.



Enter a person's name and click **Search**.

Click a person's row to add him or her as a dotted line report or manager. The system will ask to you confirm that you want to add this person as a dotted line report or manager for this person. When you add or remove a dotted line relationship using your own direct reports, the system will automatically add the person to the Dotted Line page. However, if the person reports to another manager, it will first send an approval request to that manager. After the request has been approved, the relationship will appear on the person's Profile - Dotted Line page. To see the requests you have submitted that have not been approved, access your own profile and expand the **My requests - Pending approval** section.

For descriptions of fields and controls on this page, see "(Fluid) Person Search Page" (Application Fundamentals)

To approve a dotted line request, use the Pending Approvals - Dotted Line Page.

Related Links

Using Fluid Approvals to Approve Dotted Line Relationships
Managing Dotted Line Relationships as an Administrator
Managing HR Administration Tasks as an Administrator Using Fluid

Profile - Directs Page

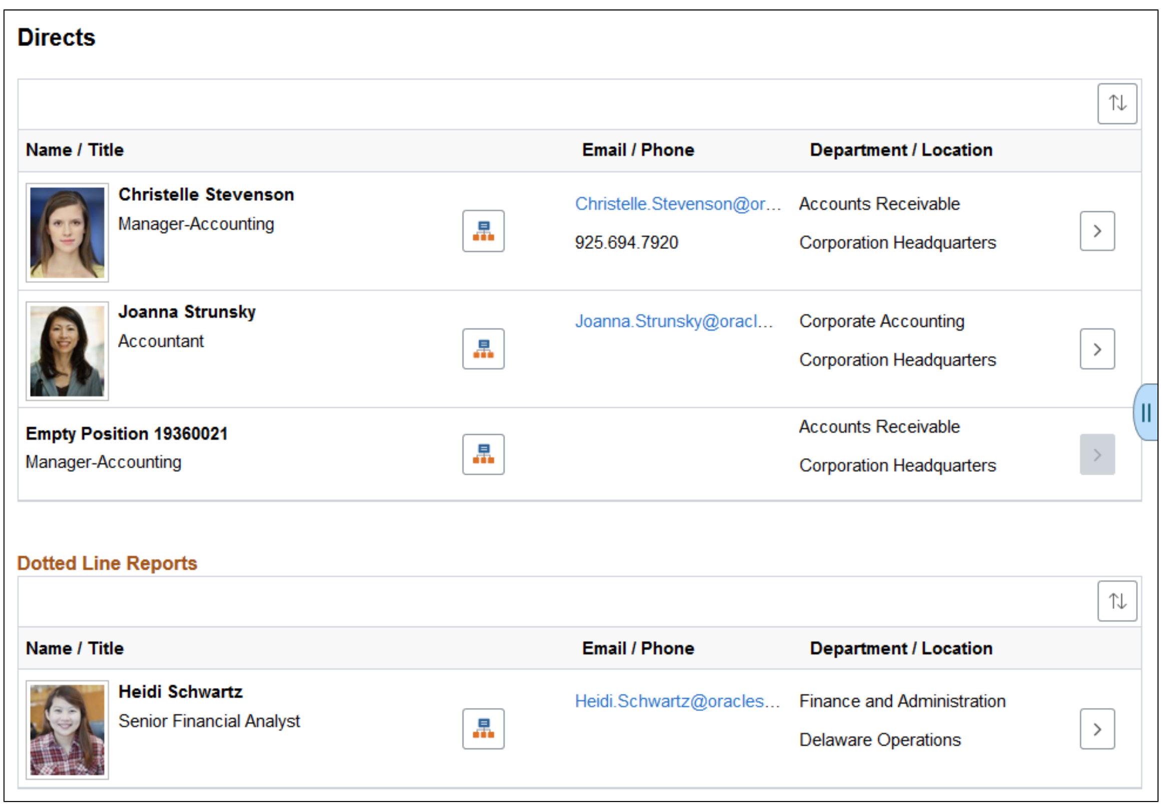
Use the Profile - Directs page (HRCD_PROFILE1_FL, HRCD_PROFILE4_FL, or HRCD_PROFILE3_FL) to view direct or dotted line reports of the person profile that you have accessed.

Navigation:

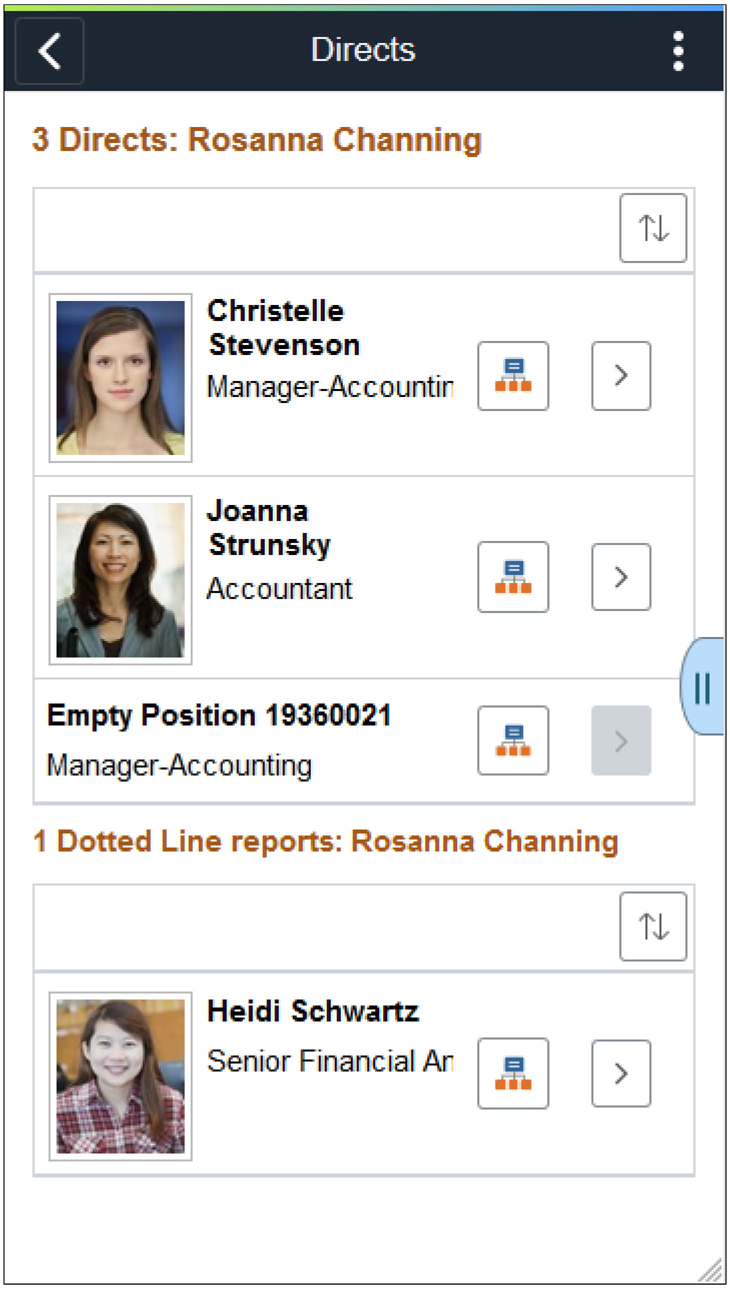
- Select the Directs tab in the left panel of the Profile page when using a large form factor device.
- Select the Directs row on the Profile page of an employee when using a small form factor device.

Note: The Profile page will not display the Directs tab or row if the person you are viewing is not a manager with direct reports or a dotted line report manager.

This example illustrates the fields and controls on the Profile - Directs page.

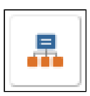
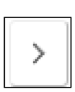


This example illustrates the fields and controls on the Directs page for a smartphone.



Use this page to view direct reports for the person you are viewing. The default sort order is by display name. Click the Sort button to change the order.

Field or Control	***Description***
Name	Displays the person's name.

Field or Control	***Description***
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - “HCM Options Page” (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - “Gender Details Page” (PeopleSoft eProfile) in employee self service.
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
 (View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

Viewing Empty Position Direct Reports

When you are using a Company Directory tree that includes empty positions, and a direct report of the manager you are viewing is a vacant position, the Directs page will include a row showing the vacant position.

Rows that are vacant positions display the text *Empty Position* and the position title. When the **Show Empty Position Number** check box is selected on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type, the position number will also appear. You cannot select and view the profile data of an empty position row since there is no person currently associated with that position.

For more information on building Company Directory trees using positions, see the Understanding the Org Chart Viewer and Company Directory Setup Steps and Tree Builder Run Control Page documentation.

Viewing Dotted Line Direct Reports

When a manager has a dotted line report, the Directs page will include a Dotted Line Reports section.

Note: The **Dotted Line Reports** section does not appear on the page if the person you are viewing does not have dotted line reports.

When a non-manager has dotted line reports, only the Dotted Line Reports section will appear on this page.

You cannot add or delete dotted line reports from this page. To manage dotted line reports, access the Profile - Manage Dotted Line Page.

You can also select the **View Org Chart** and **View Profile** buttons for the dotted reports to see information related to those individuals.

Profile - Peers Page

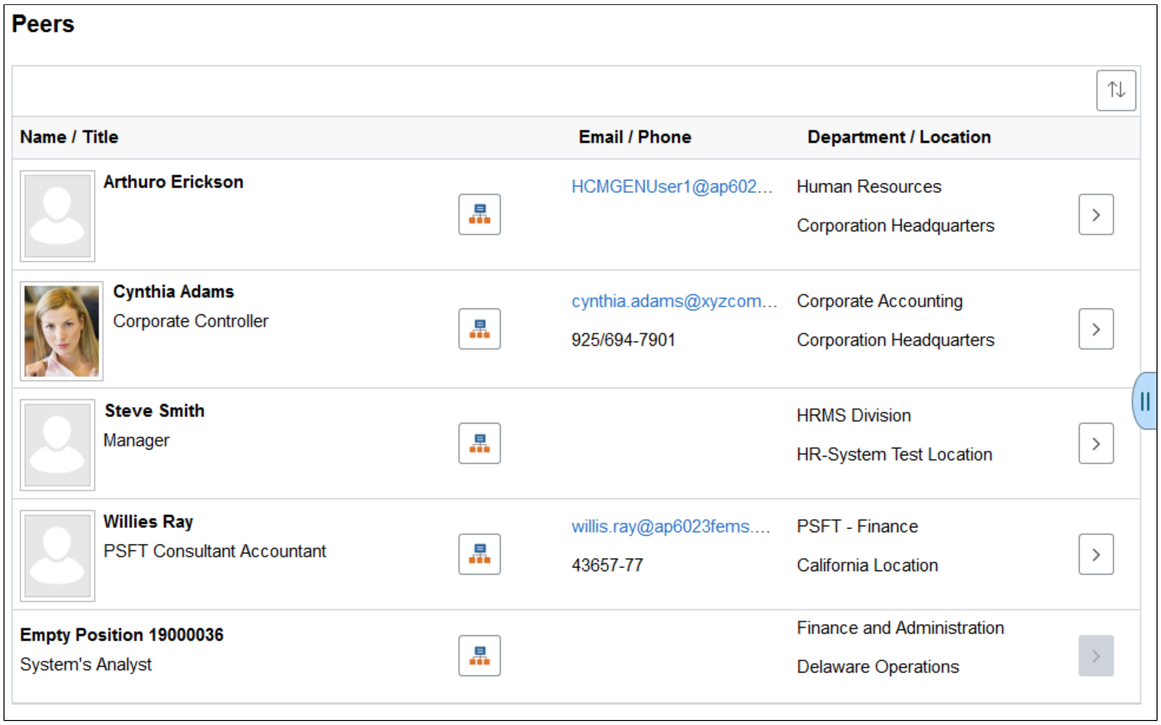
Use the Profile - Peers page (HRCD_PROFILE1_FL, HRCD_PROFILE4_FL, or HRCD_PROFILE3_FL) to view your peers, or the peers of the person profile that you have accessed in the content area, sorted by display name.

Navigation:

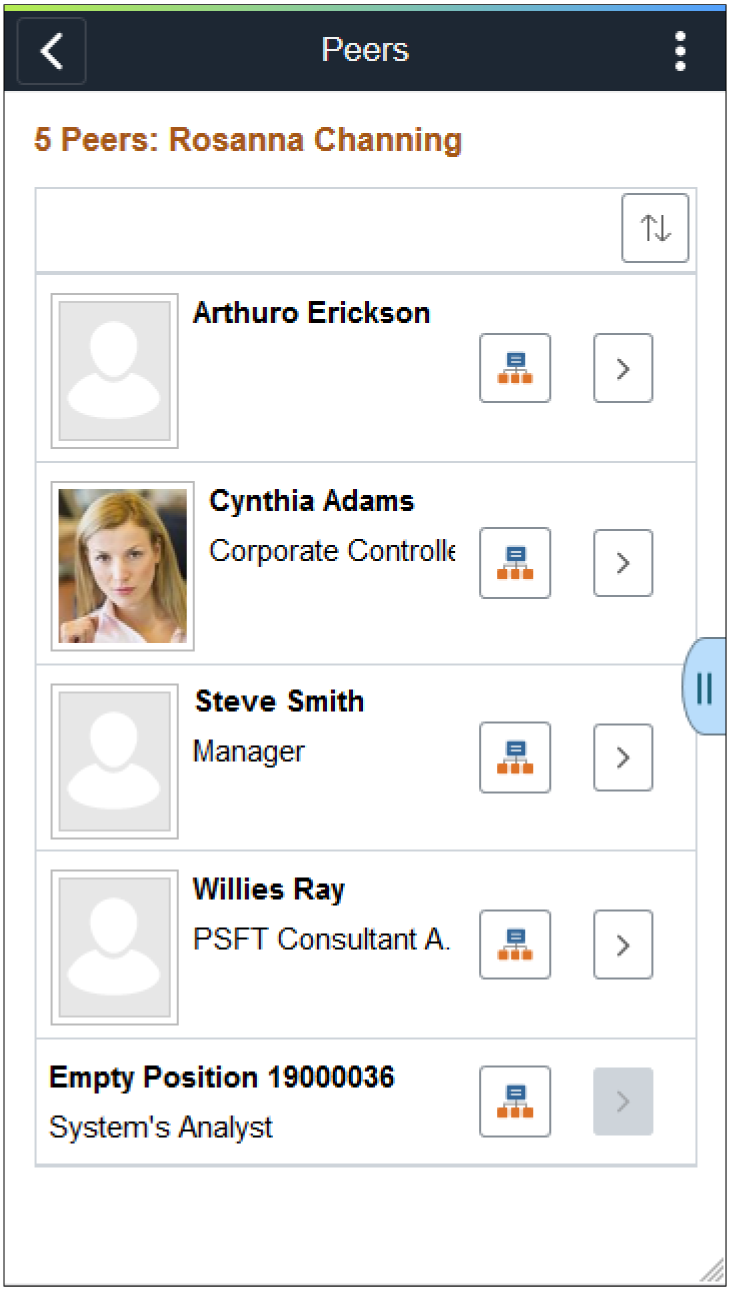
- Select the Peers tab in the left panel of the Profile page when using a large form factor device.
- Select the Peers row on the Profile page of an employee when using a small form factor device.

Note: The Profile page will not display the Peers tab or row if the person you are viewing does not have any peers.

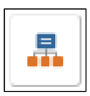
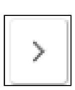
This example illustrates the fields and controls on the Profile - Peers page.



This example illustrates the fields and controls on the Peers page for a smartphone.



Field or Control	***Description***
Name	Displays the person's name.

Field or Control	***Description***
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - "HCM Options Page" (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - "Gender Details Page" (PeopleSoft eProfile) in employee self service.
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
 (View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

Viewing Empty Position Peers

When you are using a Company Directory tree that includes empty positions, and a peer of the person you are viewing is a vacant position, the Peers page will include a row showing the empty position.

Rows that are vacant positions display the text *Empty Position* and the position title. When the **Show Empty Position Number** check box is selected on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type, the position number will also appear. You cannot select and view the profile data of an empty position row since there is no person currently associated with that position.

For more information on building Company Directory trees using positions, see the Understanding the Org Chart Viewer and Company Directory Setup Steps and Tree Builder Run Control Page documentation.

Other Teams - <Team Name> Page

Use the Other Teams - <Team Name> page (HRCD_PROFILE1_FL, HRCD_PROFILE4_FL, or HRCD_PROFILE3_FL) to view a list containing the matrix team's members.

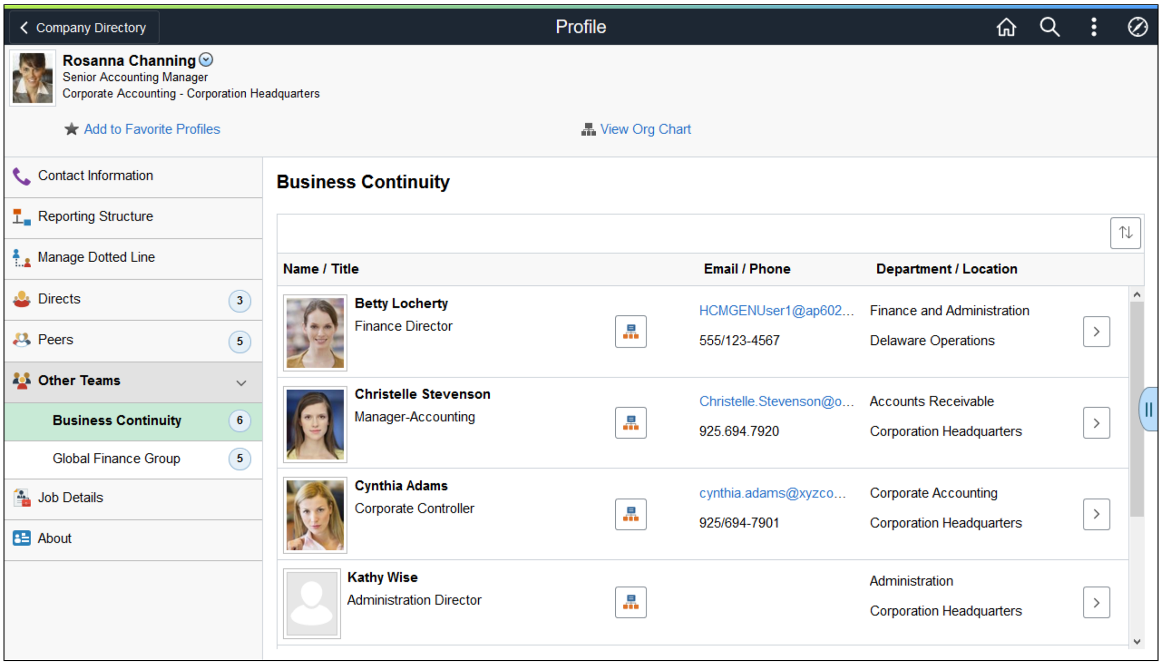
Navigation:

- Select the Other Teams tab in the left panel of the Profile page when using a large form factor device, and then select a team name.
- Select the <Team Name> row on the Profile page of an employee when using a small form factor device.

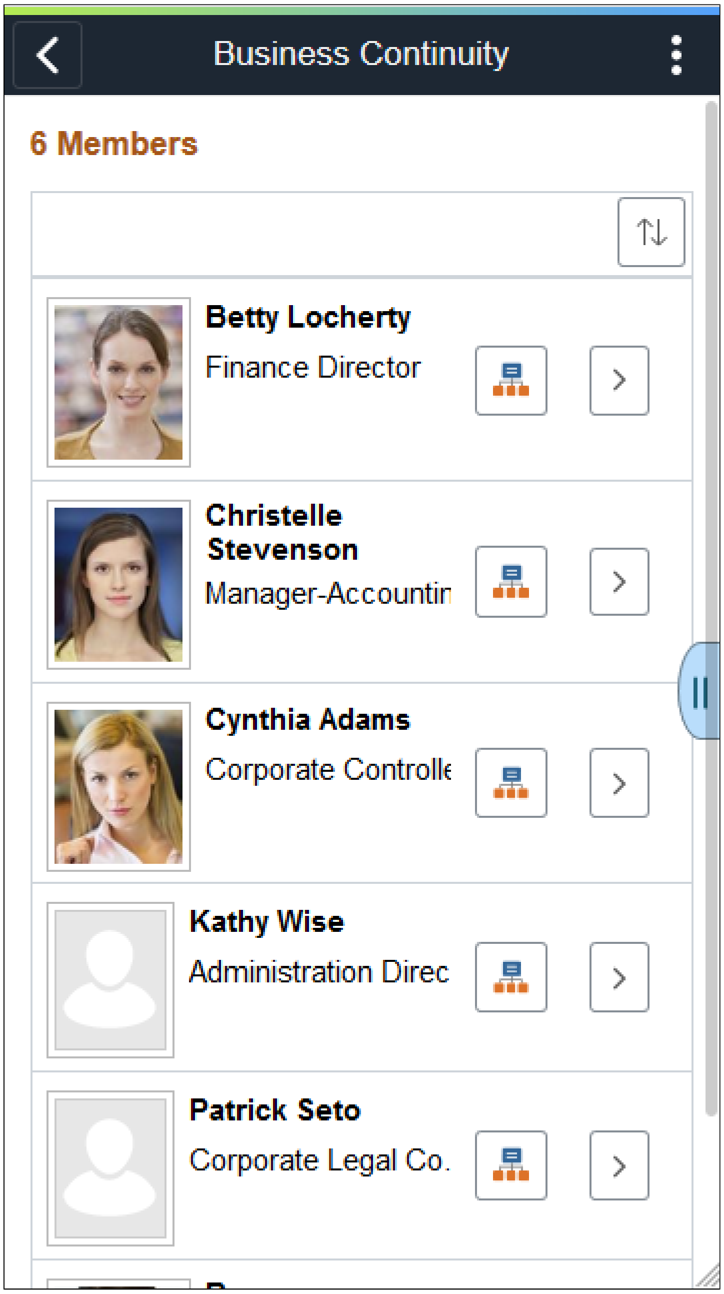
Click the Other Teams tab to expand a list of teams, then select a <Team Name> tab in the left panel of the Company Directory page or from the Profile page of an employee.

Note: The Profile page will not display the Other Teams tab or <Team Name> rows if the person you are viewing is not associated with a team accessible to you or the public.

This example illustrates the fields and controls on the Other Teams - <Team Name> page.



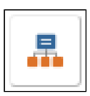
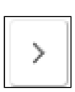
This example illustrates the fields and controls on the <Team Name> page for the smartphone.



Use this page to view individuals that are part of a specific team.

(Tablet or Desktop) When using a larger device, the left panel navigation will display the Other Teams parent category. Click this category tab to see sub-categories of all the teams this person is associated with to which you have access.

Field or Control	***Description***
Name	Displays the person's name.

Field or Control	*Description*
Pronoun	Displays the person's pronoun when enabled and the person has specified pronouns. If not configured, or an employee has not identified a pronoun, the page will not display this field. To show a person's pronouns on the Company Directory pages, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - "HCM Options Page" (Application Fundamentals). • The **Pronoun** option is selected on the Chart and Profile Settings - Profile Content Page for *Fluid Company Directory*. • The employee has identified pronouns on the Personal Details - "Gender Details Page" (PeopleSoft eProfile) in employee self service.
Title	Displays a person's title. This field can be configured to show either the person's job, business, or position title, based on the Chart and Profile Settings - Profile Content Page, **Contact Information** section, row 2 setting.
 (View Org Chart) button	Click this button on an employee row to access the Organization Chart Page with this person in the focus node.
Remote Worker Status	This field is available when **Remote Worker Status** is selected on the Chart and Profile Settings - Profile Content Page. Displays if a person is working onsite at the office, working fully remote, or working a hybrid of the two. When a person has a remote work status of fully remote or hybrid, the Profile - Remote Worker Status Page appears as a page tab within the Profile navigation pages, providing more detail about the person's remote work status.
Local Time	This field is available when **Local Time and Time Zone** is selected on the Chart and Profile Settings - Profile Content Page. Displays the employee's local time zone. Employees set their own time zone on the Contact Information page or section of the Profile pages (see the Profile - Contact Information Page or (Smartphone) Profile Page).
 (View Profile) button	Select the **View Profile** button on an employee row to access the Profile page of that person.

Profile - Job Details Page

Use the Profile - Job Details page (HRCD_PROFILE1_FL or HRCD_PROFILE4_FL) to view personal company and job details about a person.

Navigation:

Select the Job Details tab in the left panel of the Profile page.

This example illustrates the fields and controls on the Profile - Job Details page.

This page provides job information about an individual. The fields that appear on this page are based on the setup configurations determined on the Chart and Profile Settings - Profile Content Page for the *Company Directory Fluid* org view type.

To view job details for a person on a smartphone, see the (Smartphone) Profile Page.

Profile - Business Partners Page

Use the Profile - Business Partners page (HRCD_PROFILE1_FL) to view business partner contact information for an individual.

Note: The Business Partners configuration determines the number of business partners that are available for viewing. When there are no business partners to view, the Profile component will hide the Business Partners tab and page if the person you are viewing is not associated with a business partner team or if the teams are not configured to display on the Company Directory.
For configuration set up, see the Configuring Business Partners topic and Configure Business Partner Page.

Navigation:

Select the Business Partners tab in the left panel of the Profile page.

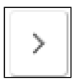
This example illustrates the fields and controls on the Profile - Business Partners page.

Business Partners

Name/Business Partner Title	Email/Phone	Department/Location
Benefits Group	benefits@oracle.com	Benefits
Benefits Specialists	555/222-1000	Corporation Headquarters
HR USA Service Center	hrservice_usa@oraclesample.com	Human Resources
HR Shared Services Specialist	646/856-1111	Corporation Headquarters

This video demonstrates the HR Business Partners feature:

Video: Image Highlights, PeopleSoft HCM Update Image 31: HR Business Partners

Field or Control	***Description***
 (View Profile) button	Select the **View Profile** button on a person contact row to access the Profile page of that individual. The View Profile button is not available for an alternate contact business partner type since there is no person profile data for this contact type.

To view business partner information for a person when using a smartphone, see the (Smartphone) Profile Page.

Profile - Remote Worker Status Page

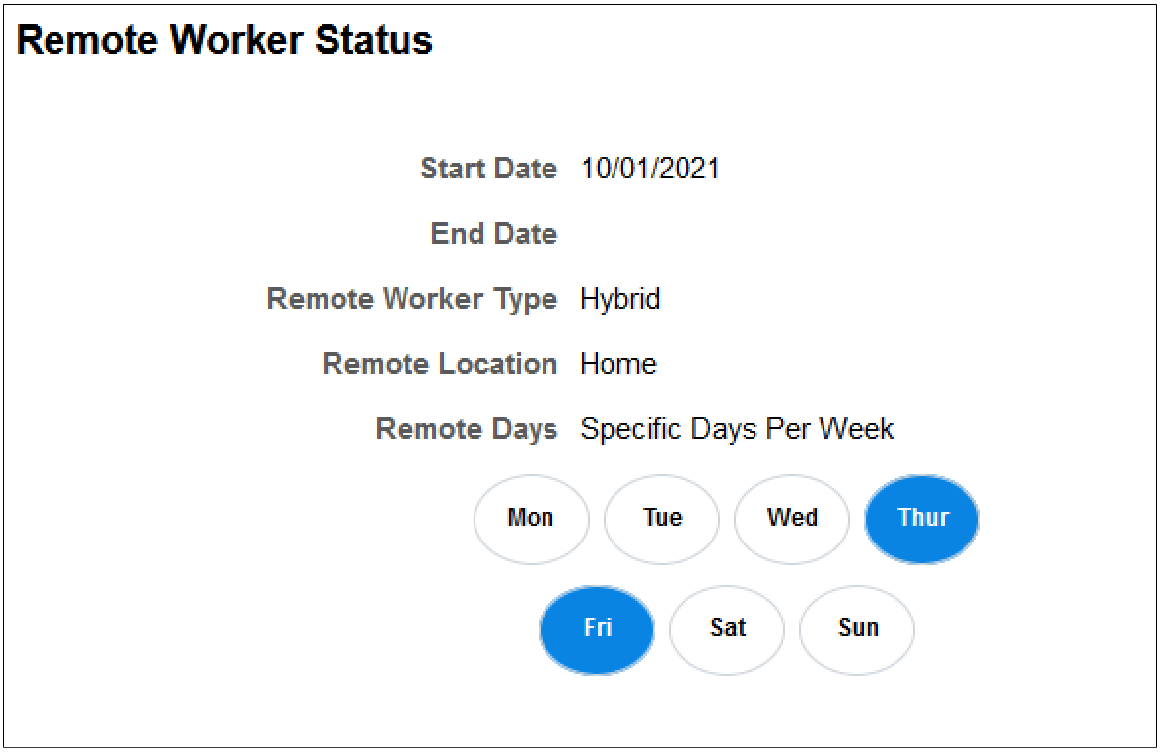
Use the Profile - Remote Worker Status page (HRCD_PROFILE1_FL) to view a summary of the remote work details for the person.

Note: This page is available when **Remote Worker Status** is enabled on the Chart and Profile Settings - Profile Content Page and the person has a current remote work record in the system.

Navigation:

Select the Remote Worker Status tab in the left panel of the Profile page.

This example illustrates the fields and controls on the Profile - Remote Worker Status page.



The page fields vary based on the employee remote worker type and schedule settings. For more information on the fields that appear on this page, see the Remote Worker Request - Request Details Page documentation.

To view remote worker information for a person when using a smartphone, see the (Smartphone) Profile Page.

This video demonstrates the Remote Worker feature:

Video: PeopleSoft Remote Worker

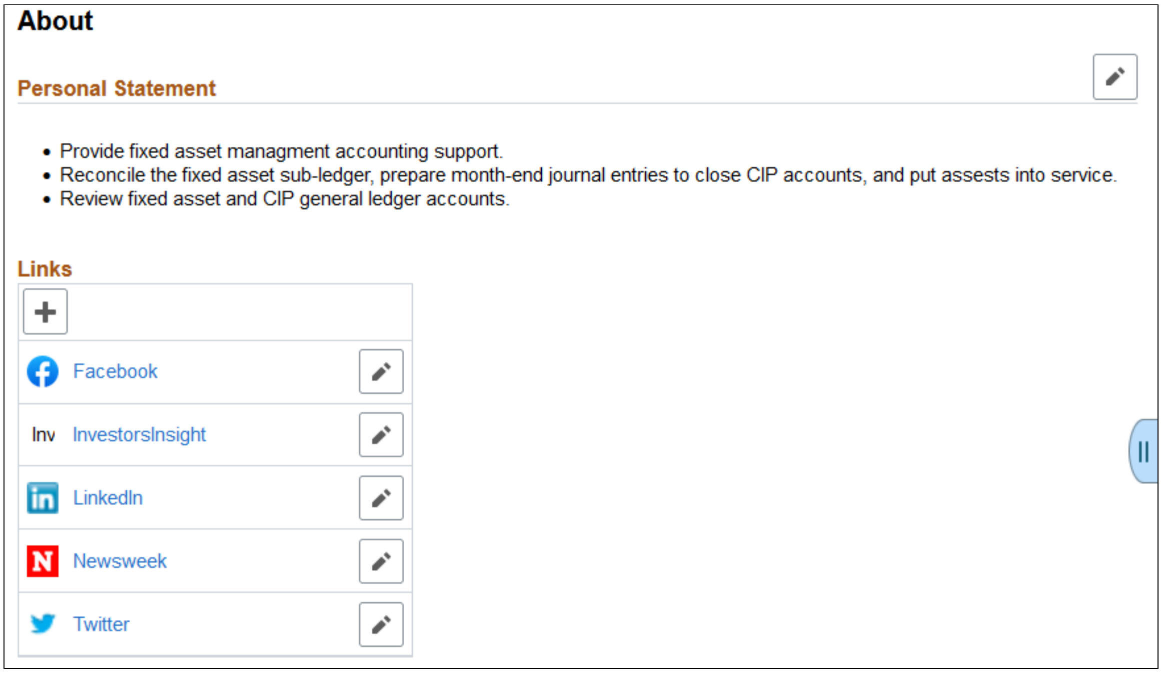
Profile - About Page

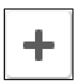
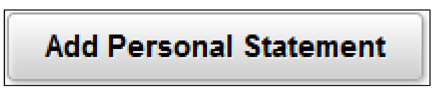
Use the Profile - About page (HRCD_PROFILE1_FL or HRCD_PROFILE4_FL) to view a personal statement or links this person has added to his or her profile.

Navigation:

Select the About tab in the left panel of the Profile page.

This example illustrates the fields and controls on the Profile - About page.



Field or Control	***Description***
	This button is available on your own profile only. Select to access the Link Page and add a new link.
	This button is available on your own profile only if you have not yet added a personal statement. Select to access the Personal Statement Page and add your own personal statement.
 (Edit) button	Select the edit button to modify an existing entry. Depending on where you click the button, the application will open either the Personal Statement Page or Link Page, where you can make changes to or delete personal statement or link. You can also select individual link Link rows on your own profile to access the Links page and update or delete existing information.

To view the personal statement or links for a person or update your own information on a smartphone, see the (Smartphone) Profile Page.

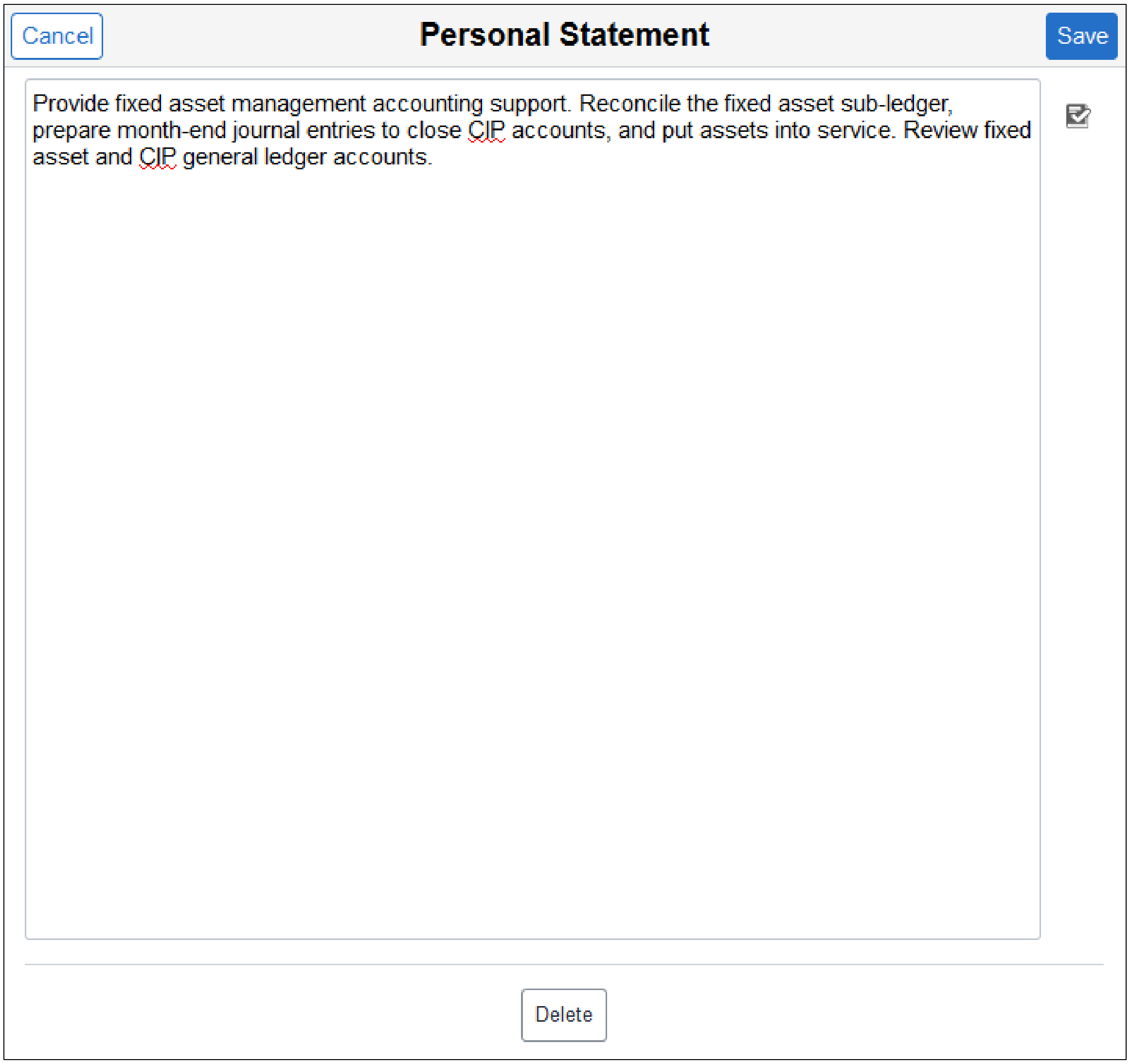
Personal Statement Page

Use the Personal Statement page (HRCD_PROFILE3S_SCF) to add, update, or delete a personal statement or comment on your profile.

Navigation:

Select the **Edit Personal Statement** button on the Profile - About page of your own profile.

This example illustrates the fields and controls on the Personal Statement page.



The Personal Statement page opens up in a modal, resizable window. Enter text and click **Save** to display the text on your Profile - About page.

Field or Control	***Description***
Cancel	Click to cancel any changes you have made to your personal statement text.
Delete	Select to remove all text from your personal statement on the Profile - About page.

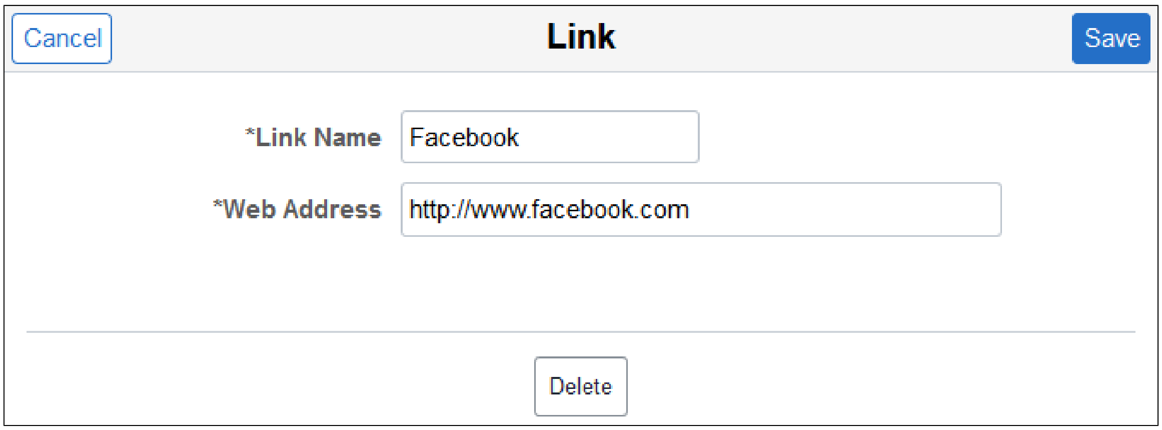
Link Page

Use the Link page (HRCD_PROFILE3L_SCF) to add, update, or delete website links to your own personal profile.

Navigation:

- Select the **Add Link** button on the Profile - About page of your own profile.
- Click an existing link row on the Profile - About page of your own profile.

This example illustrates the fields and controls on the Link page.



The Link page opens up in a modal, resizable window. Enter text and click **Save** to display the link on your Profile - About page.

Field or Control	***Description***
Cancel	Click to cancel any changes you have made to this link.
Delete	This button is available when you are updating an existing link. Select to remove this link from your personal statement on the Profile - About page.

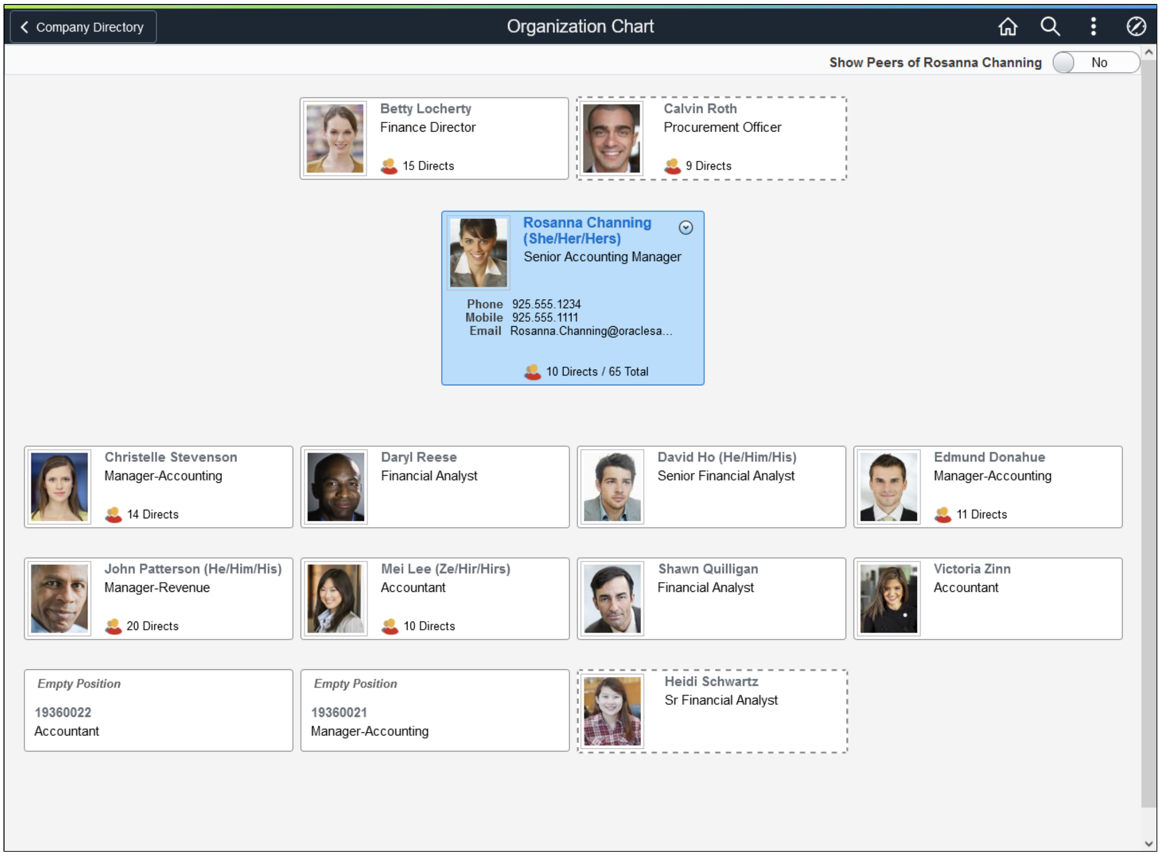
Organization Chart Page

Use the Organization Chart page (HRCD_ORG_CHART_FL) to view the hierarchical reporting structure of a person.

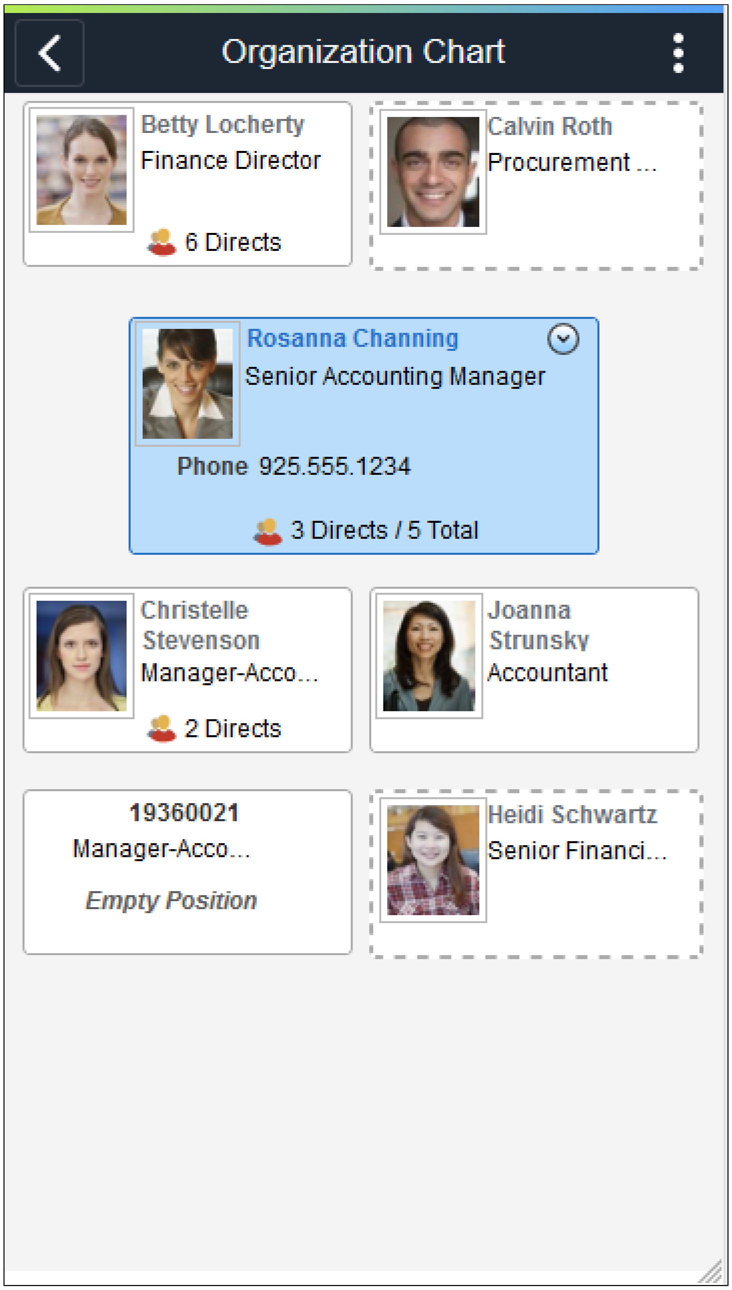
Navigation:

- Click the **View My Org Chart** link in the Company Directory home page header.
- Click the **View Org Chart** link in Profile page header.
- Click the **View Org Chart** button on an employee row.

This example illustrates the Organization Chart page for a large form factor device when you first access the page and **Show Peers of <employee name>** is set to *No*.



This example illustrates the fields and controls on the Organization Chart page for the smartphone.



This video demonstrates the Organization Chart user interface:

Video: Image Highlights, PeopleSoft HCM Update Image 27: Company Directory–Org Chart Actions

Use this page to view a graphical representation (up to three-tiers) of the reporting structure for a person.

You may need to use the vertical and horizontal scrolls to see additional information.

Field or Control	***Description***
Show Peers of <employee name>	(Desktop) When enabled, this option appears in the top right corner of the page when using a desktop. This option is not available for small form factor devices, like a smartphone. **Note:** This option is available when the administrator has selected the **Show Peers of Focus Node** check box on the Org Chart Content Page for the *Company Directory Fluid* org view type. Swipe to *Yes* to view the peers of the focus node employee in the second row. When peers are showing and exceed the width of the viewing screen, a horizontal scroll bar becomes available and you can swipe to the left or right to view all peer nodes.

Direct managers and reports appear in a node box surrounded by a solid line. Dotted line managers and reports appear in a node box surrounded by a dotted line.

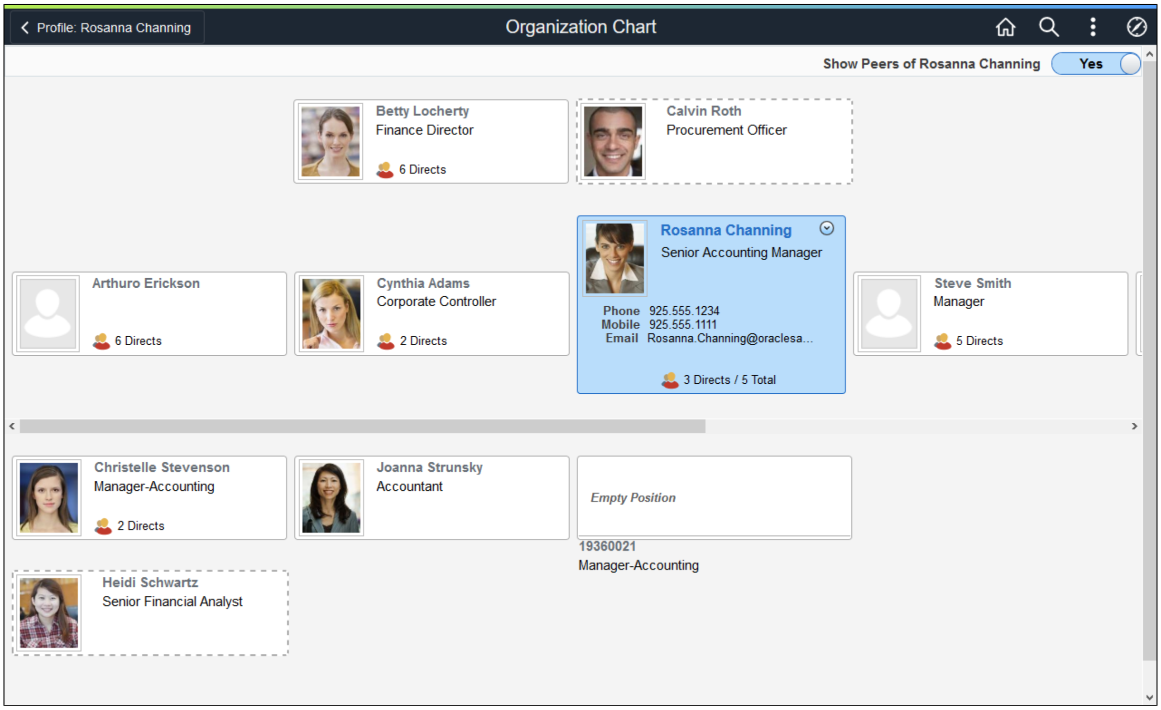
The three-tiered page levels display according to the following:

- *Top or First Tier:* The first level displays the manager and any dotted line manager of the person you are viewing.
- *Middle or Second Tier:* This row displays the person you are viewing in the focus node. The focus node appears larger and in another color. Select the name link of the person in the focus node to access his or her profile data. When given permission, the focus node also displays the **Related Action** menu button next to an employee's name, which you can select to display a list of self-service transactions that you can perform for this person.

  (Desktop or Tablet) When the **Show Peers of <employee name**>: option is set to *Yes*, the second row will also show the peers of the person in the focus node for large form factor devices.

  (Smartphone) Small form factor devices, like smartphones, will only display the focus node in this row.

This example illustrates the Organization Chart page for the tablet when you swipe **Show Peers of <employee name>** to *Yes*.



- *Bottom or Third Tier:* The third level displays the direct and dotted line reports of the person you are viewing. If there are no direct reports for this person, the third level will be blank. When there are several direct or dotted line reports, the page will wrap the nodes and enable you to scroll vertically to view all the people reporting to the person in the focus node. Dotted line reports display last. When you scroll horizontally on another row to where the focus node is no longer viewable, the direct reports fade from the third level of the page.

Click another person's node to change the focus of the organization chart. Once in the focus node, click the name link of the person to access the Profile pages for that person.

Viewing Empty Positions in the Organization Chart

When you are using a Company Directory tree that uses empty positions, and there are empty positions in the manager, peer, or direct reports positions, this page will include nodes showing the empty positions.

Empty positions will display the text *Empty Position* and position title. When the **Show Empty Position Number** check box is selected on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type, the position number will also appear. If the empty position is a manager of other employees, it will list the number of direct reports reporting to that position.

You can select an empty position node to make it the focus node, but you cannot access the profile data of an empty position since there is no person currently associated with that position.

For more information on building Company Directory trees using positions, see the Understanding the Org Chart Viewer and Company Directory Setup Steps and Tree Builder Run Control Page documentation.

(Desktop) Exporting and Printing Organization Chart Information

When using a desktop, the Organization Chart page enables users to export or print the organization chart.

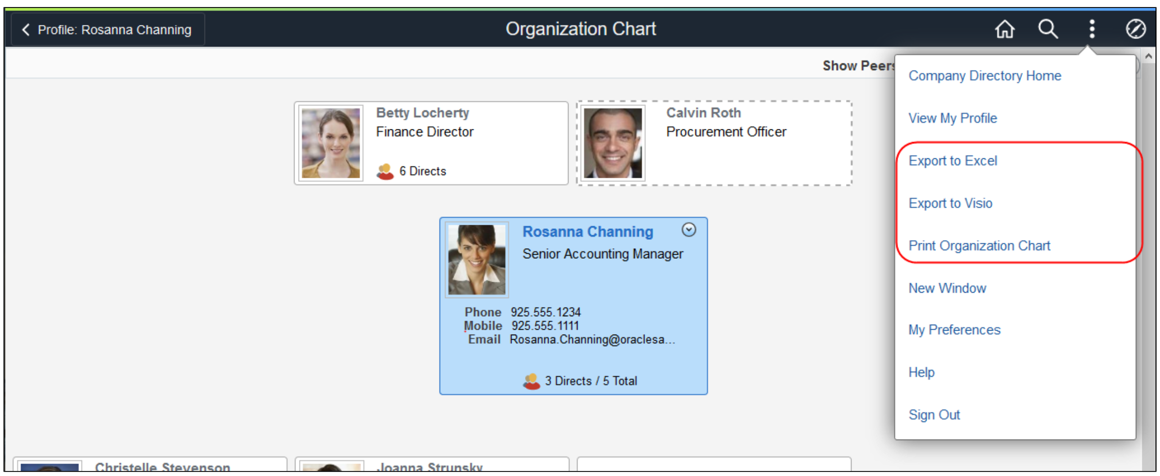
Navigation:

Select the Actions List menu button from the banner of the Organization Chart page.

Note: The list will not display the **Export to Excel** or **Export to Visio** options when you have not been granted the role to export organizational chart data. Valid roles for exporting organizational chart data are specified on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type.

Warning! These Actions List options are not available for smaller form factor devices, such as the tablet or smartphone.

This example illustrates the exporting and printing Actions List options available from the Organization Chart page when using a desktop.



This video demonstrates the Organization Chart export and printing functionality:

Video: Image Highlights, PeopleSoft HCM Update Image 27: Company Directory–Org Chart Actions

Field or Control	*Description*
Export to Excel	**Note:** This Actions List item will not be available if you have not been granted the role to export organizational chart data. Valid org chart export roles are specified on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type. Select this option to export the organization chart information to Excel using a CSV file. The spreadsheet will show the entire hierarchy starting from the focus node, then list the peers of the person in the focus node (even if the **Show Peers of <employee name>** option is not selected, and then all direct and indirect employees that roll up to the person in the focus node. A row will display for each job, meaning that if a person holds multiple jobs within that hierarchical structures, a row will appear for each job held by that person. Dotted line reports and managers will show as columns at the end of the row where the last dotted line relationship exists. If you are using a Company Directory tree that includes empty positions, and there are empty positions in the hierarchy, the output will include rows showing the empty positions. The output will show the columns in the following order: 1. Name 2. Title 3. Department 4. Manager Name 5. Manager Title 6. Dotted Line Report 7. Dotted Line Manager
Export to Visio	**Note:** This Actions List item will not be available if you have not been granted the role to export organization chart data. Valid org chart export roles are specified on the Chart and Profile Settings - General Settings Page for the *Company Directory Fluid* org view type. Select this option to export organization chart information to a CSV file for Visio. The CSV file is a datasource that contains the entire hierarchy data starting from the focus node down. You will need to import this file from Visio manually.

Field or Control	***Description***
Print Organization Chart	Select this option to have the system display the <employee name> - Organization Chart page, where you can print the current information that displays on the screen for the Organization Chart page.

Warning! The system will not export an organization chart that consists of more than 1000 employees. When this happens, the page will display a message informing the user to contact the system administrator if there is a need to export more data.

Note: Administrators can use the Export Org Chart Page or Export Organization Chart Page to export organization chart data.

(Desktop) <Employee Name> - Organization Chart Page

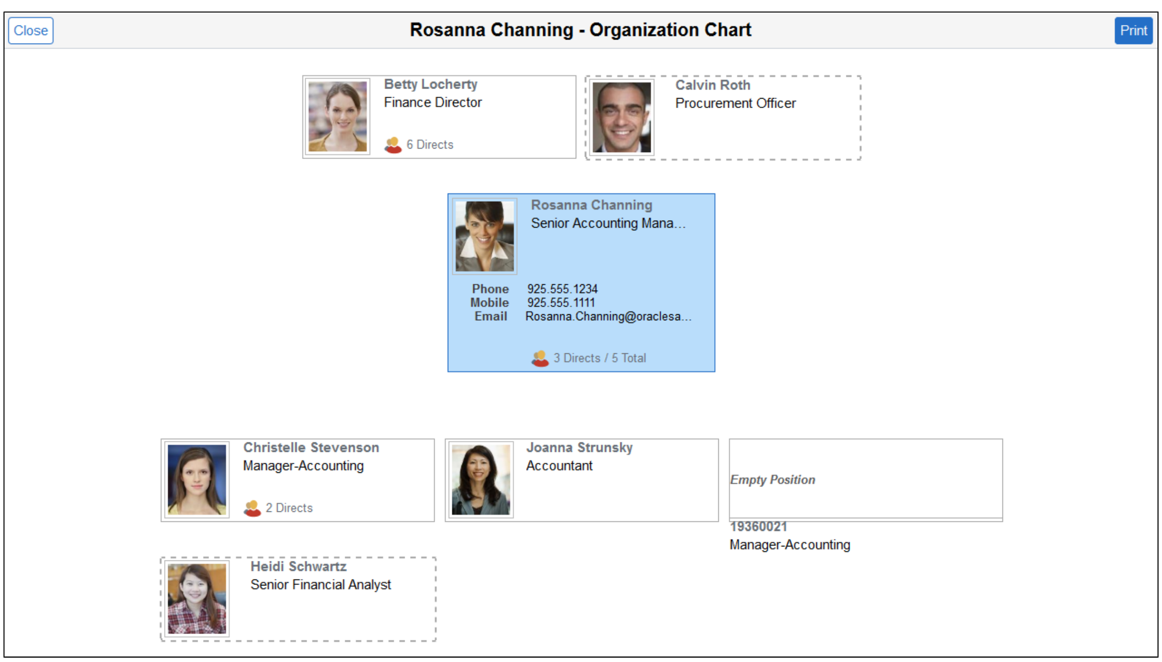
Use the <Employee Name> - Organization Chart page (HRCD_ORG_CHRT_SCF) to print the three-tiered hierarchical structure for a person.

Note: Rendering of the printed organization chart may vary by browser due to browser printing constraints.

Navigation:

Click the **Print Organization Chart** menu item in the Actions List menu accessible from the Organization Chart page.

This example illustrates the <Employee Name> - Organization Chart page when using a desktop.



This page displays the three-tiered hierarchy for the person: the manager and dotted line managers, if any; the focus node, and the direct and dotted line reports of the person in the focus node. Note that the second level will not show the peers of the person in the focus node, even if the **Show Peers of <employee name>** field is swiped to *Yes* on the Organization Chart Page.

Field or Control	***Description***
Cancel	Click this button to cancel out of the print page and return to the Organization Chart Page.
Print	Click this button to submit the organization chart for printing.

Exporting the Organizational Chart as an Administrator Using Fluid

HR administrators use the Export Organization Chart page to download organizational chart data into an Excel or a Visio file.

These topics discuss how an administrator exports the organizational chart to an Excel or Visio file.

This video provides and overview of the HR administrator org chart export:

Video: Image Highlights, PeopleSoft HCM Update Image 28: Company Directory-HR Administrator Org Chart Export

Pages Used to Export the Organizational Chart as an HR Administrator Using Fluid

Page Name	***Definition Name***	***Usage***
Export Org Chart Page or Export Organization Chart Page	HRCD_ORG_EXP_FL	Export the organizational chart to an Excel or Visio file.

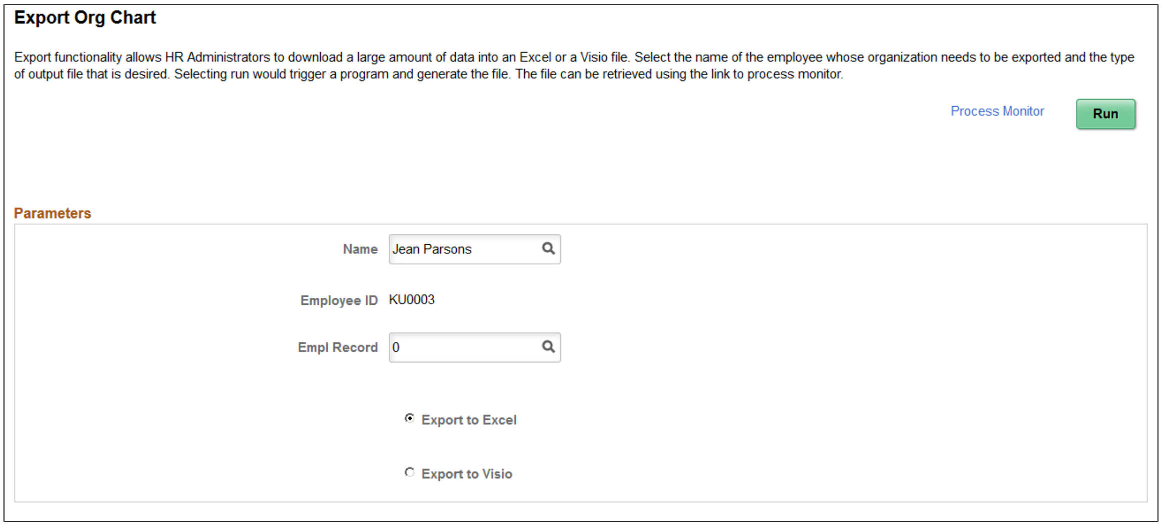
Export Org Chart Page or Export Organization Chart Page

Use the Export Org Chart page (HRCD_ORG_EXP_FL) or Export Organization Chart page (HRCD_EXPORT_PG) to export the organizational chart to an Excel or Visio file.

Navigation:

- From the “Workforce Administrator Homepage” (Application Fundamentals) in fluid, click the HR Administration Tile, then select the Export Org Chart page item tab.
- **Workforce Administration** > **Export Organization Chart** > **Export Organization Chart**

This example illustrates the fields and controls on the Export Org Chart page.



Field or Control	***Description***
Name, Employee ID, and **Empl Record**	Enter the employee name and record number for whose organizational structure you wish to export. The page displays the employee ID of the person you enter.

Field or Control	***Description***
Export to Excel	Select this option to export the org chart information to Excel using a CSV file. The CSV file is a datasource that contains the entire hierarchy data starting from the focus node down. The spreadsheet of the Excel file output shows the entire hierarchy starting from the employee you selected, then lists this person's peers, and then all direct and indirect employees that roll up to the person. A row will display for each position, meaning that if a person holds multiple jobs within that hierarchical structures, a row will appear for each job held by that person. Dotted line reports and managers will show as columns at the end of the row where the dotted line relationship exists. If you are using a Company Directory tree that includes empty positions, and there are empty positions in the hierarchy, the output will include rows showing the empty positions. The output will show the columns in the following order: 1. Name 2. Title 3. Department 4. Location 5. Manager Name 6. Manager Title 7. Dotted Line Report 8. Dotted Line Manager
Export to Visio	Select this option to export org chart information to a CSV file for Visio. The CSV file is a datasource that contains the entire hierarchy data starting from the focus node down. You will need to import the CSV file data from Visio manually. It contains similar information as the Excel file, minus the dotted line information, only in Visio format.
Run and **Process Monitor**	Click the **Run** button to initiate the process that extracts the org chart data and creates the CSV file. Access the Process Monitor to retrieve the Org_<person name>.csv file.

Using the PeopleSoft Fluid User Interface for Self Service Matrix Teams

Employees can create and manage matrix teams through the PeopleSoft Fluid User Interface pages. Matrix teams represent a reporting chain or hierarchy that is not a traditional direct-line reporting relationship and are typically composed of people from different areas of an organization who have come together to solve a common problem or achieve a goal through collaboration.

Note: Matrix teams are not designed to consist of large teams. They are smaller teams that are typically formed for a specific purpose.

Employees use the Manage Matrix Teams pages in fluid self service to define matrix teams. This includes specifying the employee reporting relationships and, optionally, assigning transaction permissions to leads within these matrices.

Video: Image Highlights, PeopleSoft HCM Update Image 17: Self Service Matrix Management

These topics discuss how to create a matrix team using PeopleSoft Fluid User Interface.

Related Links

Setup Matrix Types Page
Matrix Team Page

Pages Used to Create and Manage Matrix Teams Using PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Manage Matrix Teams Tile	HC_HRMH_CREAT_TEAM_FL (this is the cref for the tile)	Access the fluid pages where you can create and manage matrix teams.
Manage Matrix Teams Page	HRMH_CREAT_TEAM_FL	View a list of teams you own or create a new matrix team.
Manage Matrix Teams - Filter Page	HRMH_TM_FILTER_SCF	Apply one or more filters to narrow your list of matrix teams.
Matrix Team Page	HR_EE_MTRX_FL	Create and manage matrix team details. Enter details such as the team name, status, description, a team owner, and identify team members.
Matrix Team - Filter Page	HR_MTRX_FILTER_SCF	Apply one or more filters to narrow the list of members in the team.
Person Search Page	HR_PSEL_FLU	Search for and select a person to add to a team.
Member Details Page	HR_MTRX_MEM_SEL_FL HR_MATRX_MEM_SCF	View details about a member of a team.

Manage Matrix Teams Tile

Use the Manage Matrix Teams tile to access the fluid pages where you can create and manage matrix teams.

Navigation:

Select Fluid Home under the main menu and select the homepage to which you have added the Manage Matrix Teams tile.

Note: As an employee, you can add the tile through the Personalize Homepage, Employee Self Service menu navigation when personalizing homepages.

This example illustrates the Manage Matrix Teams tile.

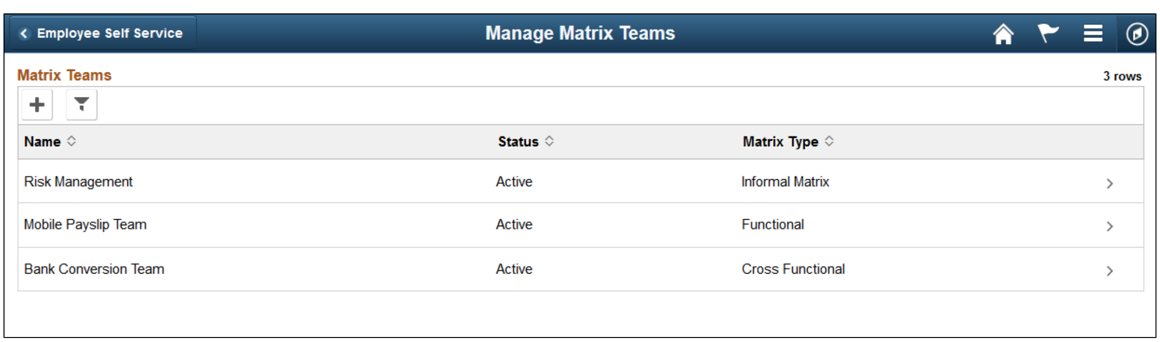
Manage Matrix Teams Page

Use the Manage Matrix Teams page (HRMH_CREAT_TEAM_FL) to view a list of teams you own or to create a new matrix team.

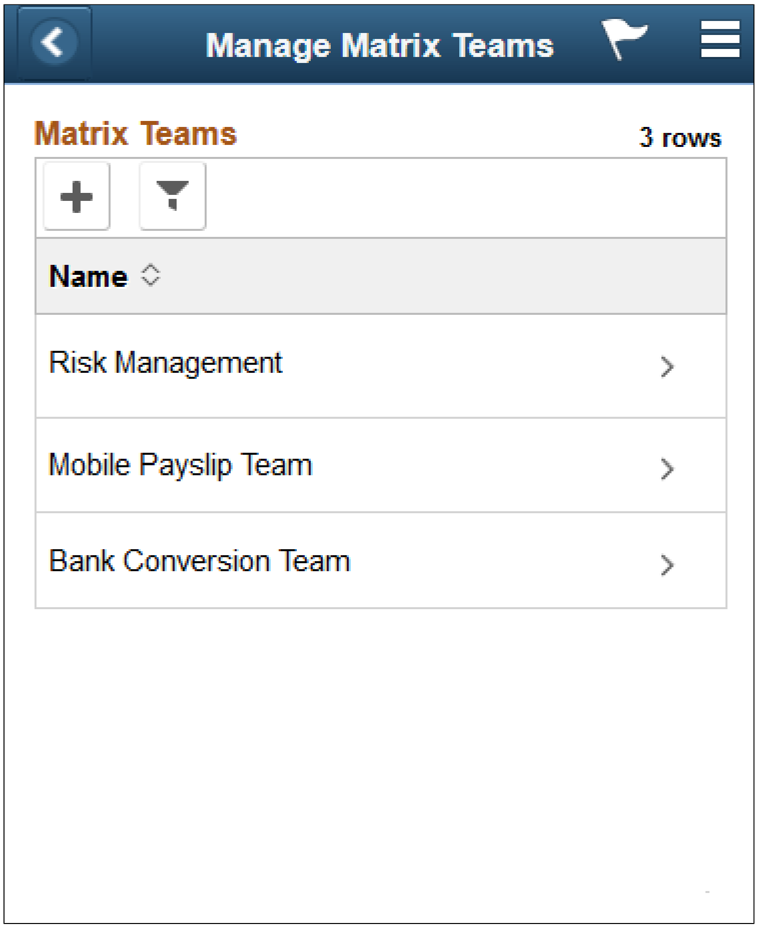
Navigation:

Click the Manage Matrix Teams tile on the homepage where you added the tile.

This example illustrates the fields and controls on the Manage Matrix Teams page for the tablet.



This example illustrates the fields and controls on the Manage Matrix Teams page for the smartphone.



Field or Control	*Description*
Create Team orIt is Create Team button	Click the button to access the Matrix Team Page to create a new team.
Filter (with filters off) icon button or Filters (with filters on) icon button	Click the filter button to access the Manage Matrix Teams - Filter Page and enter parameters used to filter the list of matrix teams to be displayed. Matrix teams can be filtered by status and matrix type. When the filter icon button is green, filters are in place. Access the Filter page to clear filters.

Click a team row to access the Matrix Team Page to view or edit an existing team.

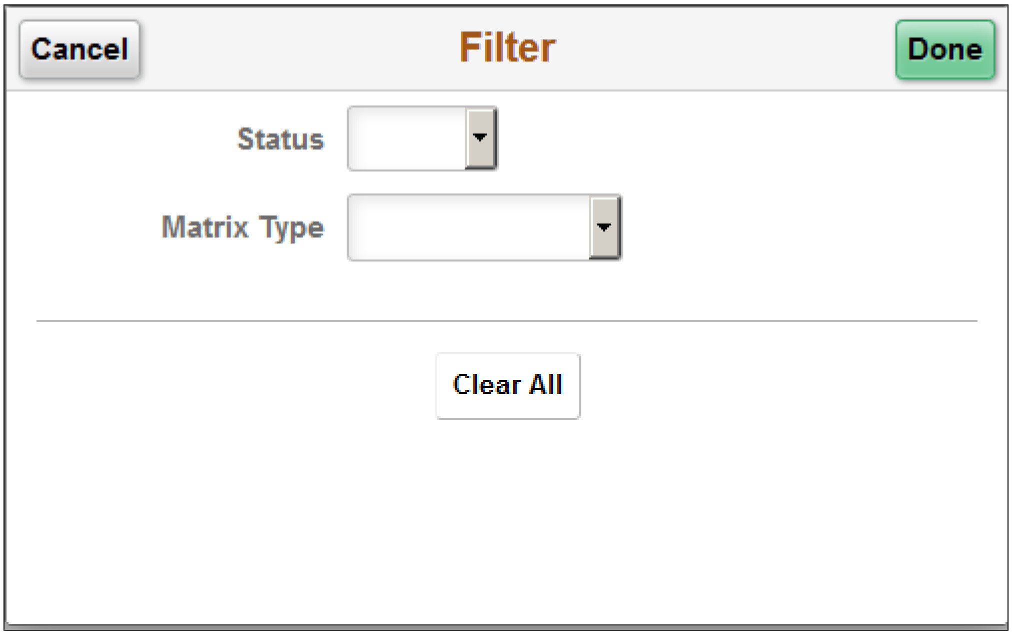
Manage Matrix Teams - Filter Page

Use the Manage Matrix Teams - Filter page (HRMH_TM_FILTER_SCF) to apply one or more filters to narrow your list of matrix teams.

Navigation:

Click the **Filter** button on the Manage Matrix Teams page.

This example illustrates the fields and controls on the Manage Matrix Teams - Filter page for the tablet and smartphone.



Field or Control	***Description***
Status	Select either *Active* or *Inactive*.
Matrix Type	Select a type of team you wish to view. Delivered options include *Cross Functional, Functional, Global Matrix,* and *Information Matrix* but the HR administrator can add other types on the Setup Matrix Types Page.
Cancel	Select this button to return to the Manage Matrix Teams page without using any changes you just made to the page.
Done	Select this button to apply the filters and refine the list of teams. The Filter icon on the Manage Matrix Teams page will change to green, indicating that there are filters in place.
Clear All	Select this button to reset the filter fields to the blank default values.

Matrix Team Page

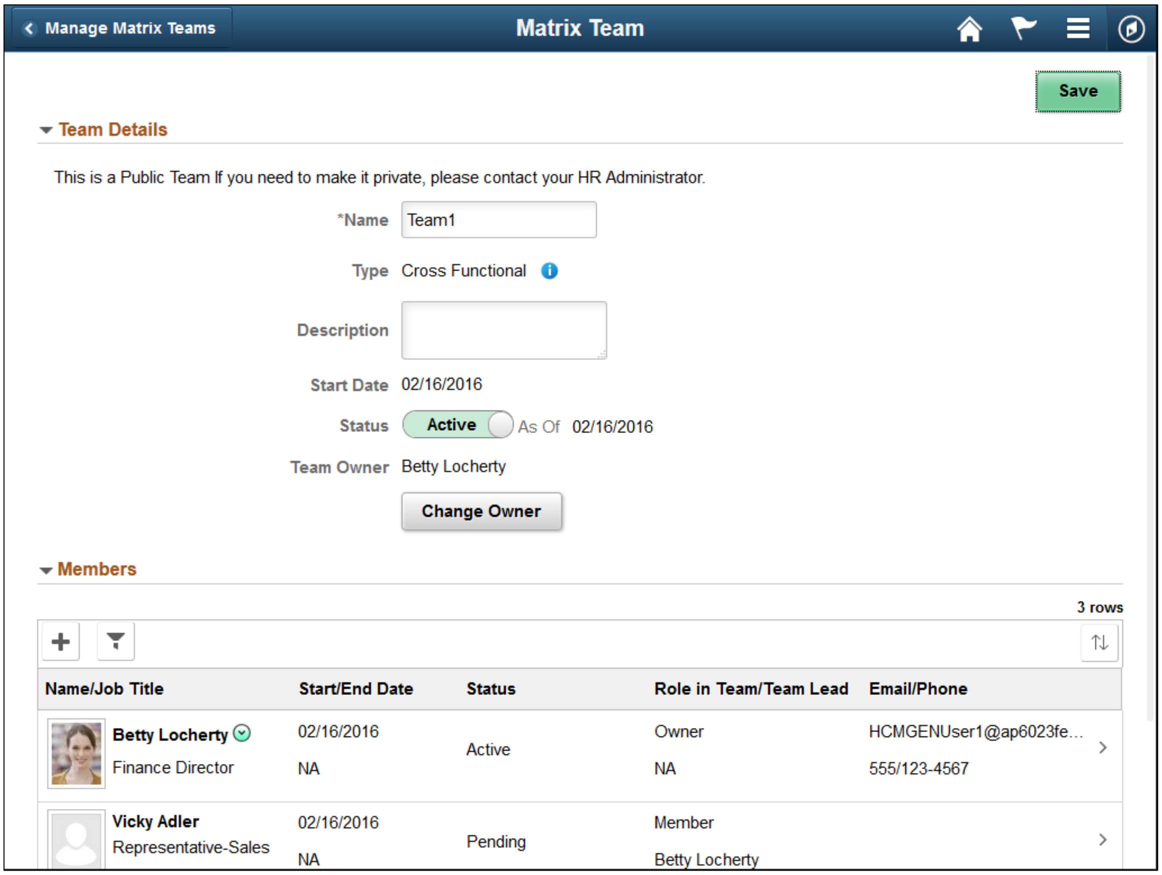
Use the Matrix Team page (HR_EE_MTRX_FL) to create and manage matrix team details, such as the team name, status, description, a team owner, and identify team members.

Note: When creating a new matrix team, the page banner will display the text **New Team**.

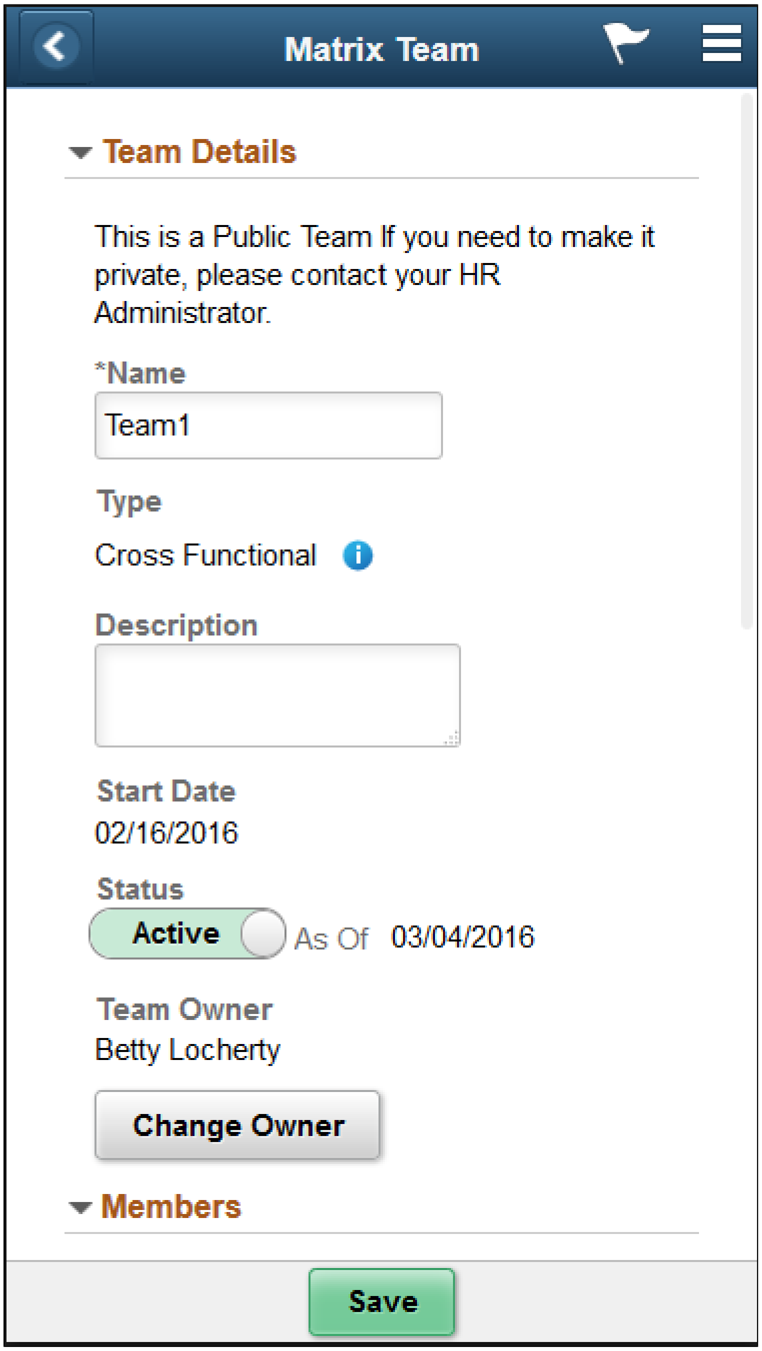
Navigation:

- Click the Create Team (+) button on the Manage Matrix Teams page.
- Select an existing team row on the Manage Matrix Teams page.

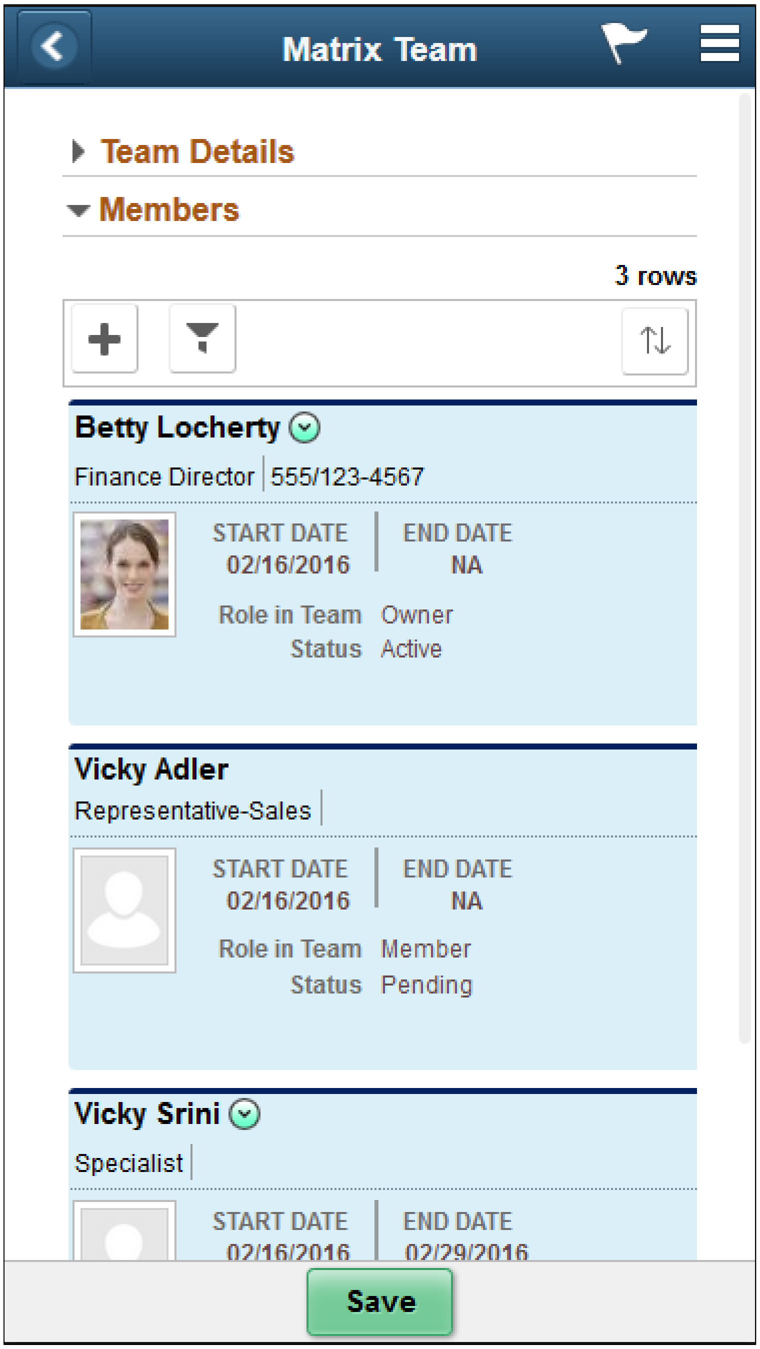
This example illustrates the fields and controls on the Matrix Team page for the tablet.



This example illustrates the fields and controls on the Matrix Team page (1 of 2) for the smartphone.



This example illustrates the fields and controls on the Matrix Team page (2 of 2) for the smartphone.



All teams are created as public by default, and viewable from the Company Directory. To make a team private, contact your HR administrator.

Team Details

Use this section to enter high level details about the team.

Field or Control	***Description***
Name	Enter the name of the team. This is the label that the application will display on the Manage Matrix Teams and Company Directory pages.
Type and  Info icon	Identify the team type category. A matrix type is configured to determine if approvals are needed to add a member to this team and which HR actions the team owner can perform. Delivered team types include: • *Cross Functional* • *Functional* • *Global Matrix* • *Informal Matrix* Select the **Info** icon to view a description and a list of HR actions available to the owner for each **Type** value. All the information shown here comes from the setup configuration defined on the Setup Matrix Types Page.
Description	Provide a brief description of the purpose of this team.
Start Date	Enter a date that this team becomes effective.
Status	For a new team, the **Status** field is hidden, however, the status of a new team is *Active* by default. For an existing team, select to activate or inactivate a team as of the date you change the status. When a team is set to *Inactive*, the status of all members of the team is also set to *Inactive*. Notifications are also sent to all members and their managers about inactivation. **Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications. Notifications delivered with HCM Image 47 or later must use Notification Composer. For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Field or Control	***Description***
Team Owner and **Change Owner**	For a new team, these fields are hidden, however the user creating the team is assigned as the owner. For an existing team, the **Team Owner** field displays the owner of this team, which is you, the user. To change the owner, click the **Change Owner** button to access the Person Search page and search and select a person. When you change the owner, the system will remove this team from your Manage Matrix Teams list, which lists only those teams you own.

Members

Use this section to add or modify team member information.

Field or Control	***Description***
Add Members button	Select this button to access the Person Search page and search for an individual.
Filter (with filters off) icon button or Filters (with filters on) icon button	Click the filter button to access the Matrix Team - Filter Page and enter parameters used to filter the list of team members on this team. When the filter icon button is green, filters are in place. Access the filter page to clear filters.
Save	Click this button to save the new or updated team and trigger an approval request, if applicable. Managers can use the Pending Approvals - Matrix Team Page in fluid to approve this transaction request.

Each active team member row displays the Related Action Menu, the dates a person is a member of the team, their status, their role on the team, who they report to within the team, and contact information. New members will have the status of *Draft* until you click save on the Matrix Team page. When an approval request is needed to add a person to a team, that person will have a status of *Pending* until the request is approved.

Select a team member row to access the Member Details Page and modify information for a member.

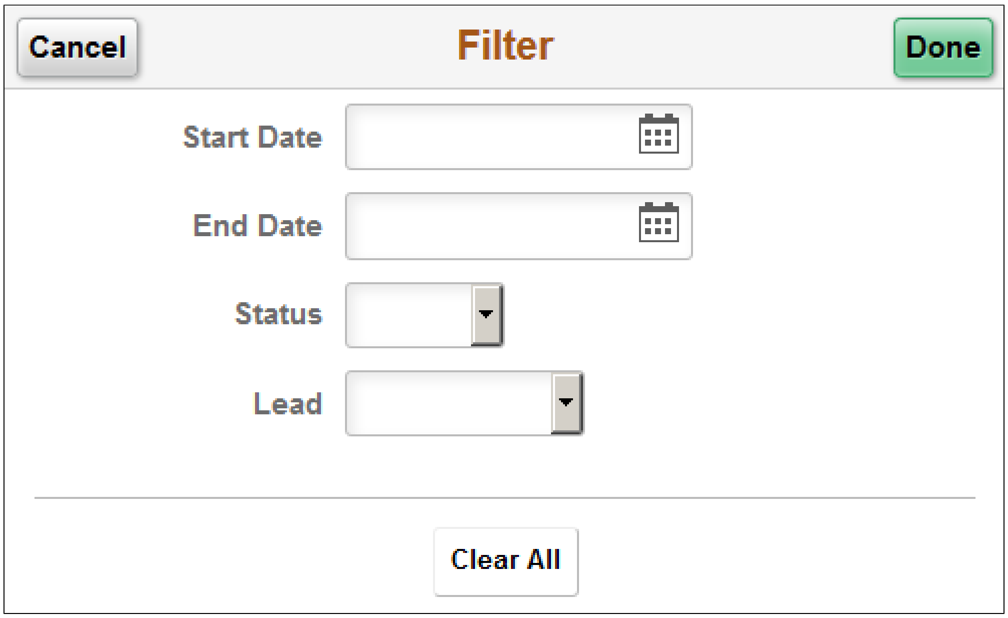
Matrix Team - Filter Page

Use the Matrix Team - Filter page (HR_MTRX_FILTER_SCF) to apply one or more filters to narrow down the list of members in the team.

Navigation:

Click the **Filter** button on the Matrix Team page.

This example illustrates the fields and controls on the Matrix Team - Filter page for the tablet and smartphone.



Use this page to enter one or several filters to narrow the list of members for the team. Parameters include start and end dates, their status on the team, and the lead to whom they report.

Field or Control	***Description***
Cancel	Select this button to return to the Matrix Team page without using any filter changes you just made to the page.
Done	Select this button to apply the filters and refine the list of members. The Filter icon on the Matrix Team page will change to green, indicating that there are filters in place.
Clear All	Select this button to reset the filter fields to the blank default values.

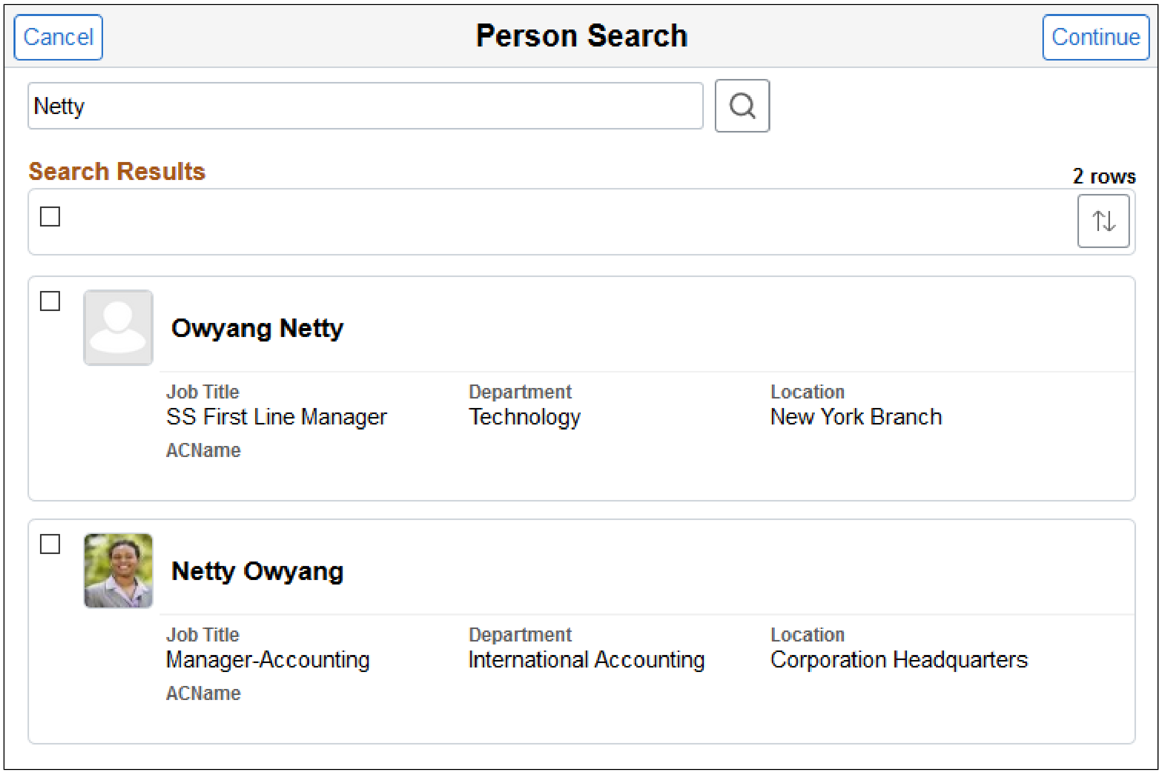
Person Search Page

Use the Person Search page (HR_PSEL_FLU) to search for and select a person to add to a team.

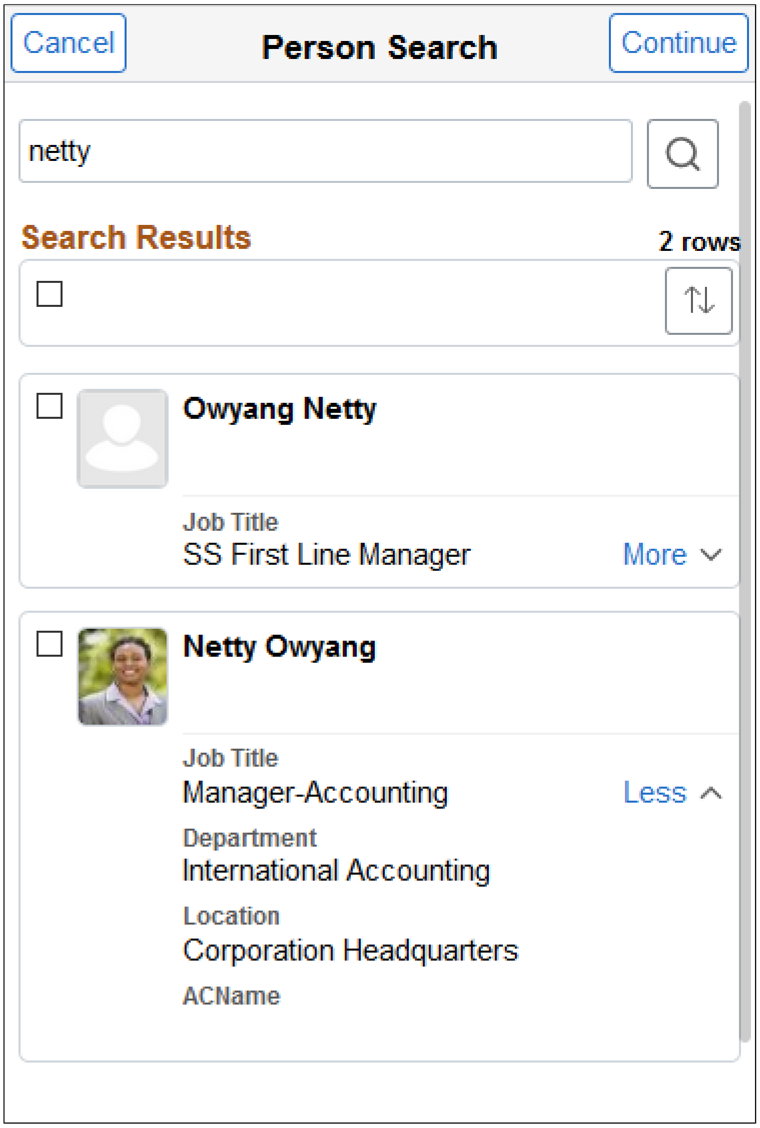
Navigation:

Click the Add Members (+) button on the Matrix Team page.

This example illustrates the fields and controls on the Person Search page for the tablet.



This example illustrates the fields and controls on the Person Search page for the smartphone.



For descriptions of fields and controls on this page, see “(Fluid) Person Search Page” (Application Fundamentals).

Select one or several individuals and click **Continue**. To select all individuals in the search results, select the check box in the header row of the **Search Results** grid.

After you click **Continue**, the system will open up the Member Details Page, where you will enter the start and end dates, role, and lead for this member. If you selected more than one team member on the Person Search page, the Member Details will display rows of data for each of those individuals.

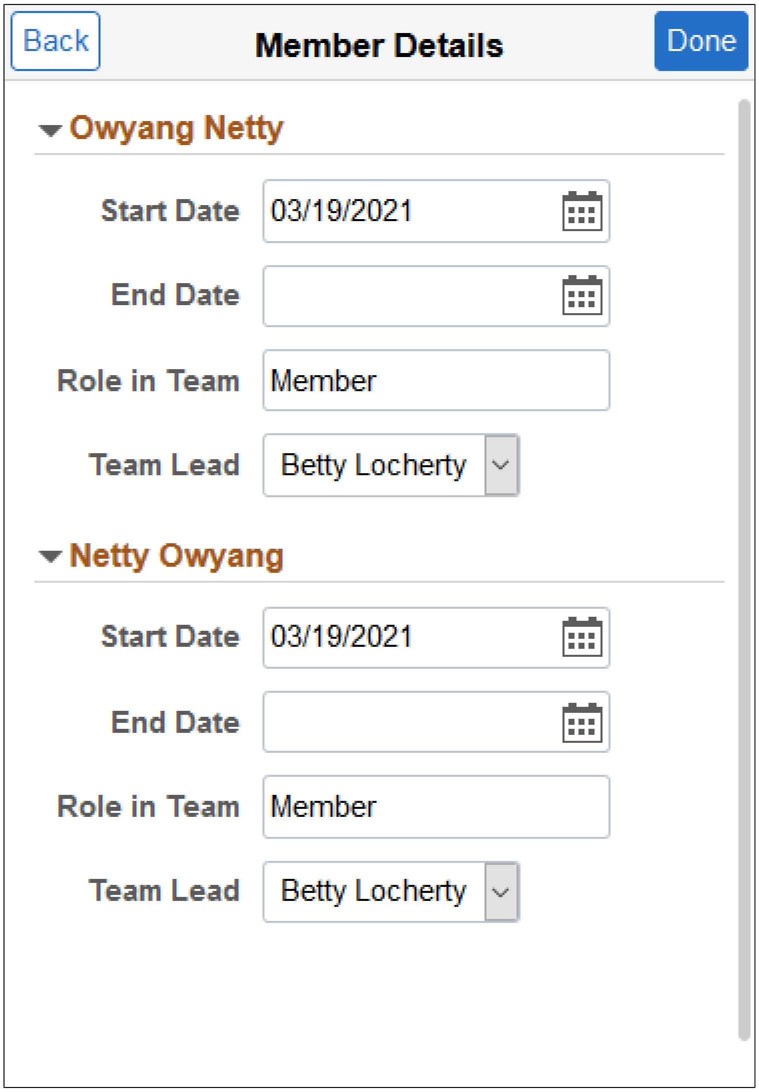
Member Details Page

Use the Member Details page (HR_MTRX_MEM_SEL_FL or HR_MATRX_MEM_SCF) to view details about a member of a team.

Navigation:

- Click the **Continue** button from the Person Search page.
- Select a team member row from the Matrix Team page.

This example illustrates the fields and controls on the Member Details page for the tablet and smartphone.



Use this page to add or modify information about a team member. When you have accessed this page from the Person Search page and have selected several individuals to add at once, this page dynamically expands to show a section for each person.

Field or Control	***Description***
Start Date and **End Date**	Enter the dates that this person is a member of the team. If you do not know the end date for this person, leave the **End Date** field blank. **Note:** You should run the *HR_MTRX_MEMB* Application Engine batch process daily to inactivate the members whose end date is equal to the current date or whose HR status is inactive.
Role in Team	Identify the role of the member for this team.
Team Lead	Identify the lead to whom this person will report. Select from a list of active members already part of this team. This creates a type of hierarchy for the team.
Delete	This button is available for employees with a *Draft* or *Inactive* status. Click to remove this person from your team.
Done	Click this button to add the person to the list of team members. Any additions or changes to team members are not saved until you click **Save** from the Matrix Team Page. For example, when you add a new person to the team list and you click **Done** from this page, the status of the person will appear as *Draft* on the Matrix Team page. You must click **Save** to save the data and trigger an approval request, if required.

Using Fluid Approvals to Approve Member Participation in Matrix Teams

This topic describes how to approve matrix team participation requests using Fluid Approvals.

Fluid Approvals supports the following matrix team approval transaction types:

- *Add Member*: When a new team member is added to the team by the team owner.
- *Change Duration*: When team owner submits a request for a change in duration for an existing team member.

See also "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (Application Fundamentals).

Pages Used to Approve Member Participation in Matrix Teams Using Fluid Approvals

Page Name	*Definition Name*	*Usage*
Pending Approvals - Matrix Team Page	EOAWMA_TXNHDTL_FL	Take action on matrix team requests.
Team Details Page	HRMH_APPR_DET_FL	Review additional matrix team details.

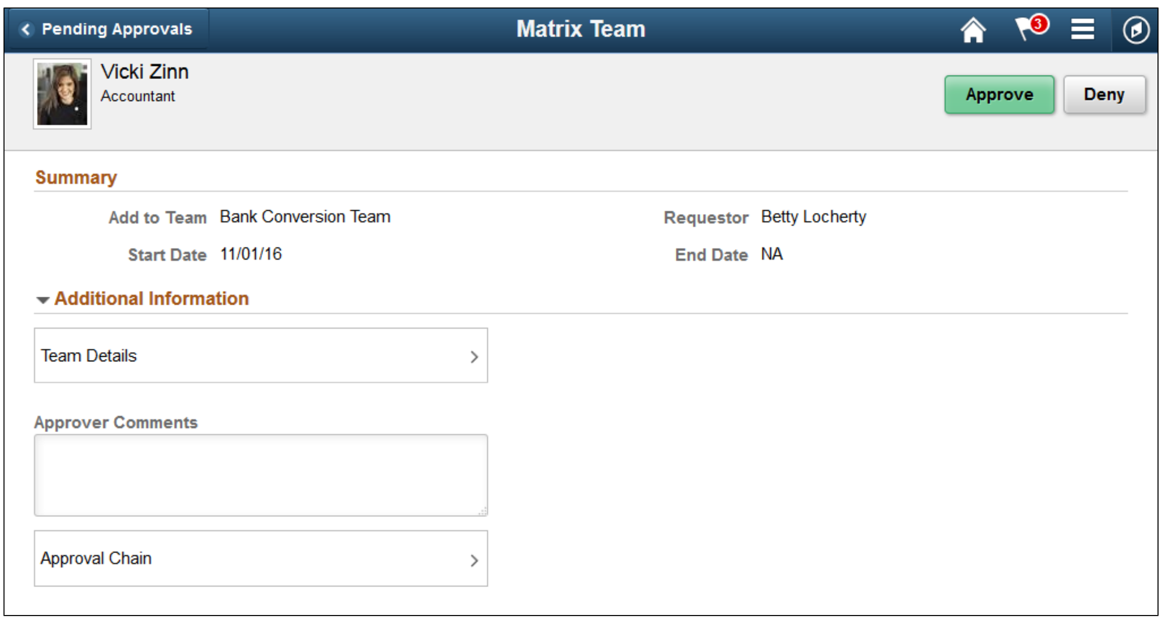
Pending Approvals - Matrix Team Page

Use the Pending Approvals - Matrix Team page (EOAWMA_TXNHDTL_FL) to take action on matrix team requests.

Navigation:

On the Manager Self Service home page, click the Approvals tile to access the Pending Approvals page. Then click a Matrix Team transaction row on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Matrix Team page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the "Pending Approvals - <Transaction Details> Page" (Application Fundamentals).

Field or Control	*Description*
Approve and **Deny**	Use these buttons to take action on the requested approval.

Summary

The summary fields on this page provide information about the transaction you are being asked to approve. Depending on the type of matrix team approval request, *Add Member* or *Change Duration*, the page will show either team information or the member's start and end times associated with the team. These fields correspond to the same-named fields that were entered or updated on the Matrix Team Page or Member Details Page.

Additional Information

Field or Control	***Description***
Team Details	Click this link to access the Team Details Page, where you can review team specifications, such as the team type, description, and team type configuration.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

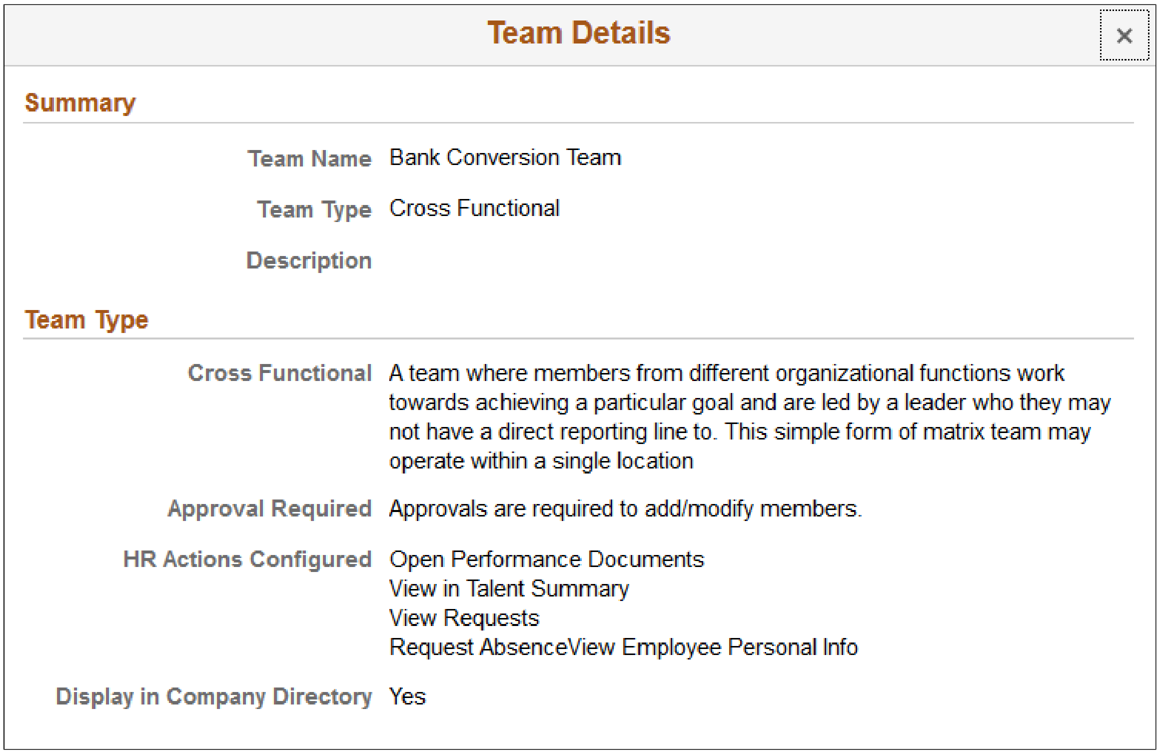
Team Details Page

Use the Team Details page (HRMH_APPR_DET_FL) to review additional matrix team details.

Navigation:

Click the **Team Details** item row on the Pending Approvals - Matrix Team page.

This example illustrates the fields and controls on the Team Details page.



The fields on this page correspond to the same-named fields on the Matrix Team Page and Setup Matrix Types Page.

Using Fluid Approvals to Approve Dotted Line Relationships

This topic describes how to approve dotted line requests using Fluid Approvals.

Fluid Approvals supports the following dotted line approval transaction types:

- *Add Dotted Line Manager*: When your employee has been requested as a new dotted line manager by the requestor.
- *Add Dotted Line Report*: When your employee has been requested as a new dotted line report by the requestor.
- *Remove Dotted Line Manager*: When your employee has been requested to be removed as a dotted line manager by the requestor.
- *Remove Dotted Line Report*: When your employee has been requested to be removed as a dotted line report by the requestor.

See also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

Pages Used to Approve Dotted Line Relationships

Page Name	***Definition Name***	***Usage***
Pending Approvals - Dotted Line Page	EOAWMA_TXNHDTL_FL	Take action on dotted line requests.

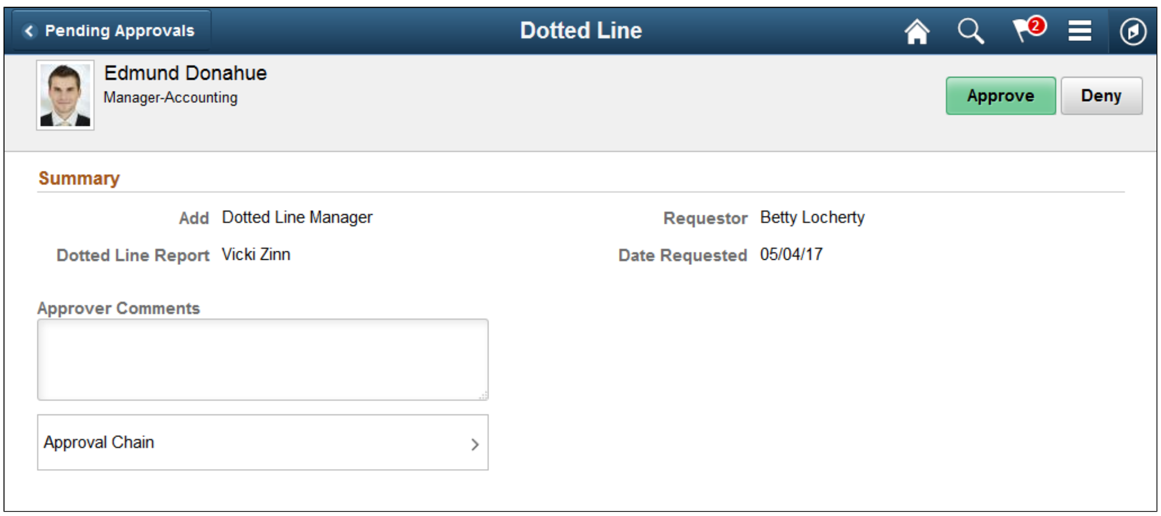
Pending Approvals - Dotted Line Page

Use the Pending Approvals - Dotted Line page (EOAWMA_TXNHDTL_FL) to take action on dotted line requests.

Navigation:

On the Manager Self Service home page, click the Approvals tile to access the Pending Approvals page. Then click a Dotted Line transaction row on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Dotted Line page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

Field or Control	***Description***
Approve and **Deny**	Use these buttons to take action on the requested approval.

Summary

The summary fields on this page provide information about the transaction you are being asked to approve. These fields correspond to the information that was entered on the Profile - Manage Dotted Line Page and Person Search Page.

Additional Information

Field or Control	***Description***
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Chapter 26

Working with Employee Directory Assistant

Understanding Employee Directory Assistant

The Employee Directory Assistant is part of the Employee Digital Assistant. PeopleSoft assistants, or skills, are computer programs that simulate a simple conversation between a digital devise and the user. The Employee Directory is a program designed to assist requestors with searching for employee contact information from the Company Directory using a conversational interface.

The Employee Directory Assistant supports retrieving Company Directory information, as shown in this table:

Company Directory Information	***Examples of Use Cases***
View profile	Who is <name> Show <name>
View manager	Who does <name> report to Who is <name’s> manager
View direct reports	Who reports to <name> Get <name’s> direct reports
View phone number	What is <name’s> phone no Show <name’s> phone
View work address	Where does <name> work Where does <name> work
View job code or position	What is <name’s> job code What is <name’s> position
View contact details	Show <name’s> contact details How do I contact <name>

Company Directory Information	***Examples of Use Cases***
View email address	What is <name's> email address Get email address of <name>

PeopleSoft uses the Oracle Digital Assistant (ODA) platform for interacting with users to help them perform certain tasks and is available for both desktop and mobile users. For more information about ODA, see Using Oracle Digital Assistant.

These videos provide an overview of the Employee Directory Assistant feature:

Video: PeopleSoft Digital Assistant Technology and Extensibility

Video: PeopleSoft Employee Directory Assistant

Video: Image Highlights, PeopleSoft HCM Update Image 33: Company Directory Assistant

Video: Image Highlights, PeopleSoft HCM Update Image 35: Chatbot Updates–Twilio channel and WebSDK Update

Related Links

"Understanding Skills" (Enterprise Components)
"Creating the Channel" (Enterprise Components)

Understanding the Employee Directory Assistant Channels

PeopleSoft enables you to use the Employee Directory Assistant using the following mediums:

- Web-based channel

  Access the Employee Directory Assistant within the PeopleSoft application using the web [see (Web-Based Channel) Using Employee Directory Assistant].

- Twilio-based text channel

  Use a text application form to access the Employee Directory Assistant [see (Twilio-Based Text Channel) Using Employee Directory Assistant].

Although the conversation logic, support, and PeopleSoft authentication is the same between both the web-based and Twilio-based text channels, it is important to understand the differences between the two mediums.

	Web-Based Channel	***Twilio-Based Text Channel***
Channel (medium of accessing the Employee Directory Assistant)	Access through the PeopleSoft web application.	Access through a text application client using a standard company registered number for the Employee Directory Assistant.

	Web-Based Channel	*Twilio-Based Text Channel*
User Experience	Uses a browser. Richer user experience, uses a card layout with ability to select push buttons for actions. Quick replies through postback actions (easy replies).	Supports text only and, in some cases, hyperlinks (dependent on the text client). Selecting an action is provisioned by numbering the actions or result sets and the user is expected to enter a number for the corresponding action or selection.
Branding	Provides branding of the client used to interact with the Employee Directory Assistant.	No branding—look and feel of the client comes with pre-delivered client.

PeopleSoft Employee Digital Assistant Tools

The Employee Directory Assistant also uses these tools:

PeopleSoft PICASO

PeopleSoft Intelligent Chatbot ASsistant from Oracle (PeopleSoft PICASO) is a consolidated, single-point access chatbot where your employees can ask questions spanning multiple PeopleSoft applications like Absence, Benefits, Employee Directory, Expenses, North American Payroll, and more. For information on PeopleSoft PICASO, see “Understanding PeopleSoft PICASO” (Enterprise Components).

REST API

With Tools 8.59, the digital assistant services (such as Absence, Employee Directory, and so forth) are REST API enabled to manage the Oracle Digital Assistant instances. For information on REST API, see “Understanding REST API Endpoints for PeopleSoft” (Enterprise Components) and “Understanding REST API Endpoints for PeopleSoft Employee Directory (employeedirectory)” (Enterprise Components).

(Web-Based Channel) Using Employee Directory Assistant

To perform contact and reporting inquiries about individuals in your organization, access the Employee Directory Assistant (skill) in the web-based application via the Employee Digital Assistant—also known as the PeopleSoft Intelligent Chat ASistant from Oracle (PICASO, or PeopleSoft PICASO). In addition to requesting directory information, the PeopleSoft Employee Digital Assistant provides you with a consolidated, single-point access to ask questions spanning multiple PeopleSoft tasks and applications, such as absences, benefits, expenses, payroll, and more.

This topic discusses how requestors can interact with Employee Directory Assistant skill using a web-based channel.

Note: For using a text-based interface, see the (Twilio-Based Text Channel) Using Employee Directory Assistant topic.

Related Links

Understanding Employee Directory Assistant
"Understanding Skills" (Enterprise Components)
"Configuring PeopleSoft PICASO" (Enterprise Components)

Pages Used to Interact with the Employee Directory Assistant with a Web-Based Channel

Page Name	***Definition Name***	***Usage***
PeopleSoft PICASO Button	N/A	From the PeopleSoft web-based application, launch the Employee Digital Assistant to access the various skills, such as the Employee Directory Assistant.
(Web-Based) Employee Directory Assistant Page	EOCB_CLIENT_FL	Begin the interaction with the Employee Directory Assistant for quick answers to queries about contact, profile, and reporting information from the web-based PeopleSoft application.

PeopleSoft PICASO Button

Use the PeopleSoft PICASO button from the PeopleSoft web-based browser to launch the Employee Digital Assistant and access the various skills.

Navigation:

The PeopleSoft PICASO button appears in the bottom right corner of any PeopleSoft web application home page, dashboard, or fluid application page for employees and managers.

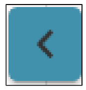
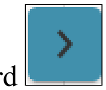
This example illustrates the Employee Digital Assistant showing the Employee Directory Assistant skill.

Select to access the (Web-Based) Employee Directory Assistant Page. This window is a virtual assistant for an employee to help with company directory related queries.

(Web-Based) Employee Directory Assistant Page

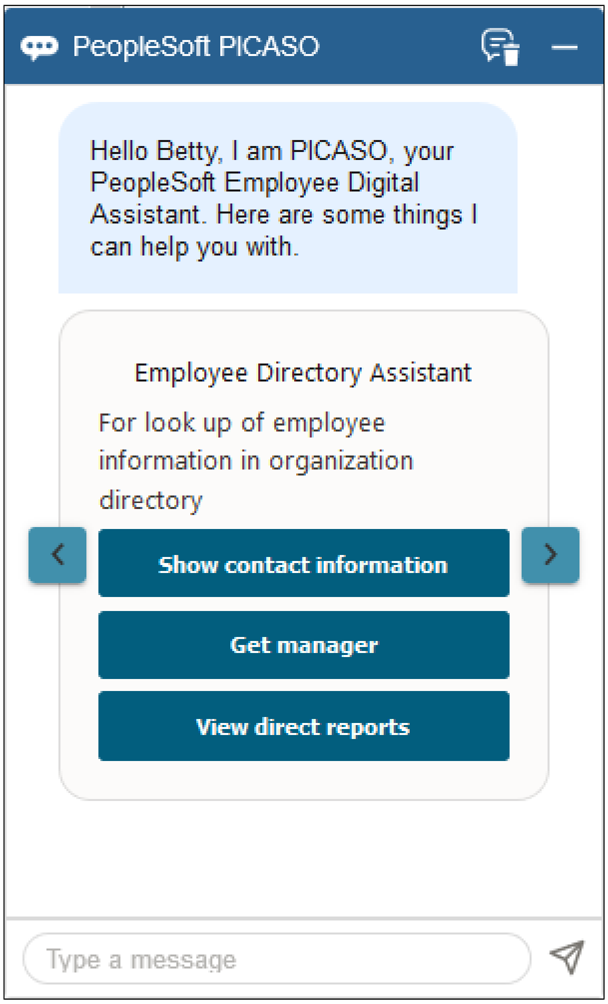
Use the web-based Employee Directory Assistant page (EOCB_CLIENT_FL) to get quick answers to queries about contact, profile, and reporting information.

Navigation:

Click the PeopleSoft PICASO Button from any fluid homepage to open the Employee Digital Assistant, then select the Previous Card  or Next Card  buttons to access the Employee Directory Assistant card.

Note: You must have the *Employee Directory Chatbot* role to access to the Employee Directory Assistant.

This example illustrates the Employee Digital Assistant showing the Employee Directory Assistant card and a list of requests it supports.



You can start the conversation by selecting a button on the card or by entering a greeting or a search string.

Understanding the Employee Directory Assistant (Skill) Functions

The directory assistant introduces itself and presents various skill cards from which you can scroll between using the right and left arrow buttons. Each skill card provides a list of examples of skill-related requests. For example, the Employee Directory Assistant provides suggestions such as show contact information, a manager, or the direct reports of a person.

Supported inquiries about yourself or another employee allow you to:

- Display profile information
- View phone numbers
- Retrieve email addresses
- Provide work addresses
- Display general contact information
- View a person’s job title
- Retrieve reporting information about a person’s manager or direct reports

Making an Inquiry and Viewing Results

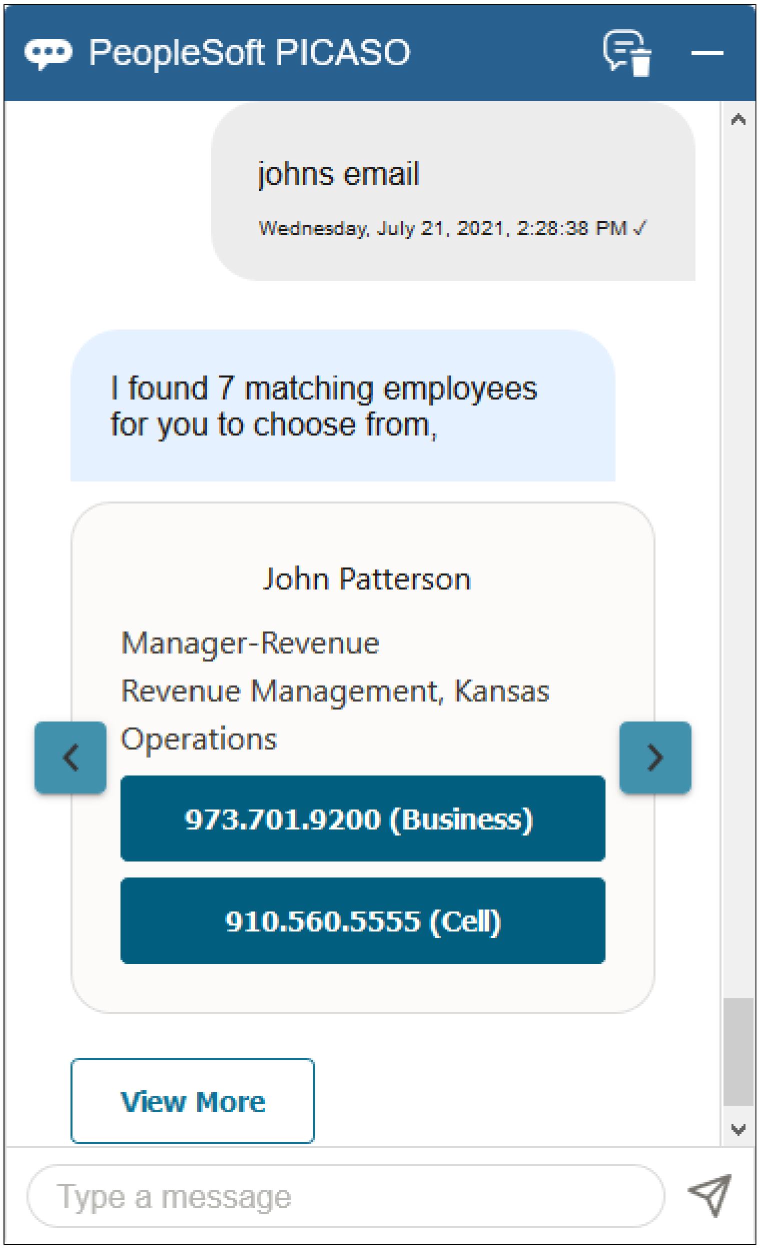
Enter a request inquiry at any time.

Note: You do not need to enter question marks (?) when making an inquiry or add an apostrophe (') when using a name. For example, you can enter the following inquiry without punctuation marks:
what is johns phone number

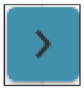
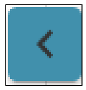
Based on the message you entered, the assistant retrieves a set of results. Each match is shown in a card view. Scroll horizontally through the cards to see the first five (5) contacts that match your request. Select the **View More** button to see the next set of five. The assistant will retrieve up to 20 matches, but administrators can change the number of results that display in the conversational flow.

Note: When multiple results match a search name, the results are ranked based on the logged in user's department and location, in descending order. For instance, if a user enters an inquiry for *john* and there are multiple individuals in the directory with *John* in their name, the assistant will display any *john* who works in the user's department first followed by any *john* who works in the user's location.

This example illustrates the Employee Directory Assistant page showing a question about contact information and the number of people that match that request.



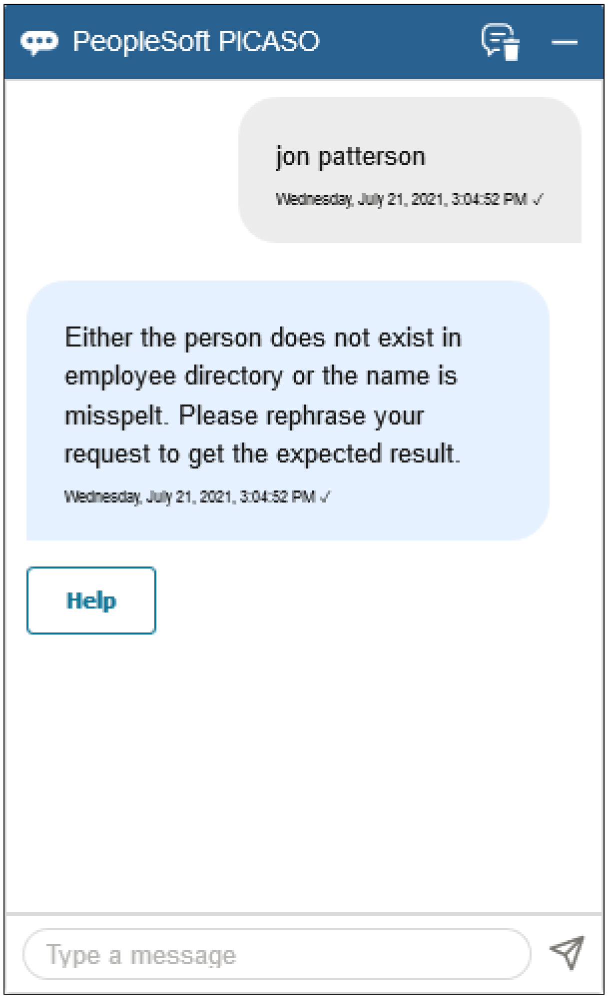
Each card displays basic profile information. Responses may present you with all the detail you need or provide links or buttons to access additional information. When presented with a button or link, it appears in a different color indicating that you can take action on this reply. Use links and buttons in response to the most recent response; you cannot go back to a button or link from a previous reply.

Field or Control	***Description***
 (Next card button) or  (Previous card button)	Use these buttons to scroll horizontally through the search results cards. The window will show up to five horizontal responses as cards with details to help you discern the employee information you are seeking. If there are more than five individuals that match the search inquiry, click the **View More** button to see the additional matches.
View <contact type> button	Select this button to view the related information, such as contact, profile, or manager details.
 button	Click to display additional results that match the search inquiry. This icon button is available when there are more than five individuals match the search inquiry.

Making Invalid Inquiries

Occasionally you may enter information that is incorrect, is not understood, or is not supported by the Employee Directory Assistant. The bot will indicate that you need to rephrase your request or it states that it does not understand your request.

This example displays the results after entering incorrect information.



Field or Control	***Description***
 button	Select the Help button to retrieve the list of supported requests to help you understand which questions you can ask.

(Twilio-Based Text Channel) Using Employee Directory Assistant

PeopleSoft HCM enables you to use the Twilio-based text medium to support the use of the Employee Directory Assistant using text messaging through a smartphone.

This topic discusses prerequisites to using the Twilio-based text assistant and how requestors can interact with Employee Directory Assistant using Twilio.

Note: For using a web-based interface, see the (Web-Based Channel) Using Employee Directory Assistant topic.

This video provides an overview of Twilio-Based Employee Directory Assistant:

Video: Image Highlights, PeopleSoft HCM Update Image 35: Chatbot Updates–Twilio channel and WebSDK Update

Related Links

Understanding Employee Directory Assistant

"Understanding Skills" (Enterprise Components)

Pages Used to Interact with Employee Directory Assistant with Twilio-Based Text Channel

Page Name	***Definition Name***	***Usage***
(Twilio-Based Text Channel) Employee Directory Assistant	N/A	Interact with the Employee Directory Assistant for quick answers to queries about contact, profile, and reporting information using text messaging.

Prerequisites for the Employee Directory Assistant for Twilio-Based Text Channel

To use the Employee Directory Assistant through the Twilio-based text channel, your application team will first need to complete the following:

1. Procure Twilio credentials for Employee Directory Assistant.

   The number will act as the Twilio number for the Employee Directory Assistant from which employees will interact.

2. Create a Twilio channel in the Digital Assistant (Settings > Channels tab > Create icon) and link the Account SID, Auth Token and phone number you obtained from the Twilio console to the Twilio channel. Enable the channel to create a new Bots Channel. Enable MMS, if needed.

   Update the webhook URL in the Twilio console with the webhook URL that was generated when you created the channel.

   a. Navigate to Twilio > Phone Numbers > Manage Numbers > Active Numbers.

   b. Select the number procured for the bot.

   c. On the Configure tab: Messaging section, update the A MESSAGE COMES IN field to *Webhook*, enter the **Webhook URL** value from the channel, and select *HTTP POST* from the drop down.

3. Apply the latest Skill from PeopleSoft in the Oracle Directory Assistant. This contains the updated Dialog flow and custom component package

   Add the **PSauthurl** custom parameter to the skill in the Custom Parameters section of the Configuration page.

To create a new Twilio channel for your skill, see "Creating the Twilio Channel" (Enterprise Components).

Important! You must be on PeopleSoft HCM image 35 or greater to use the Twilio-based text channel.

Related Links

"Creating Bot Definitions" (Enterprise Components)
"Understanding the Chatbot Architecture" (Enterprise Components)
"Installing and Setting Up a Delivered Skill" (Enterprise Components)

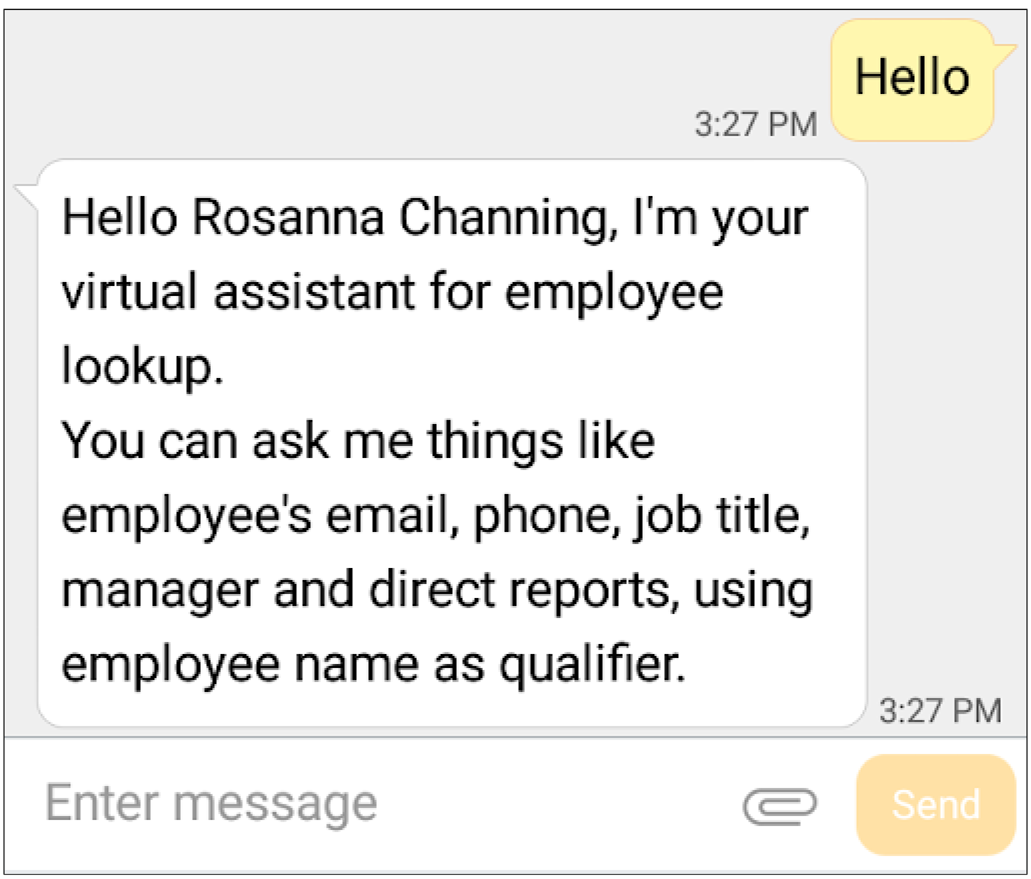
(Twilio-Based Text Channel) Employee Directory Assistant

Use the Twilio-based text channel to interact with the Employee Directory Assistant for quick answers to queries about contact, profile, and reporting information using text messaging.

Navigation:

Text a greeting to your organization's Twilio number for the Employee Directory Assistant. You will receive an authentication URL where you will enter your PeopleSoft credentials.

This example illustrates the Employee Directory Assistant text message showing a list of requests it supports.



Understanding the Employee Directory Assistant Functions

After you've entered your credentials, the Employee Directory Assistant introduces itself and provides a list of examples of company directory-related requests. Supported inquiries about yourself or another employee allow you to:

- Display profile information
- View phone numbers
- Retrieve email addresses
- Provide work addresses
- Display general contact information
- View a person's job title
- Retrieve reporting information about a person's manager or direct reports

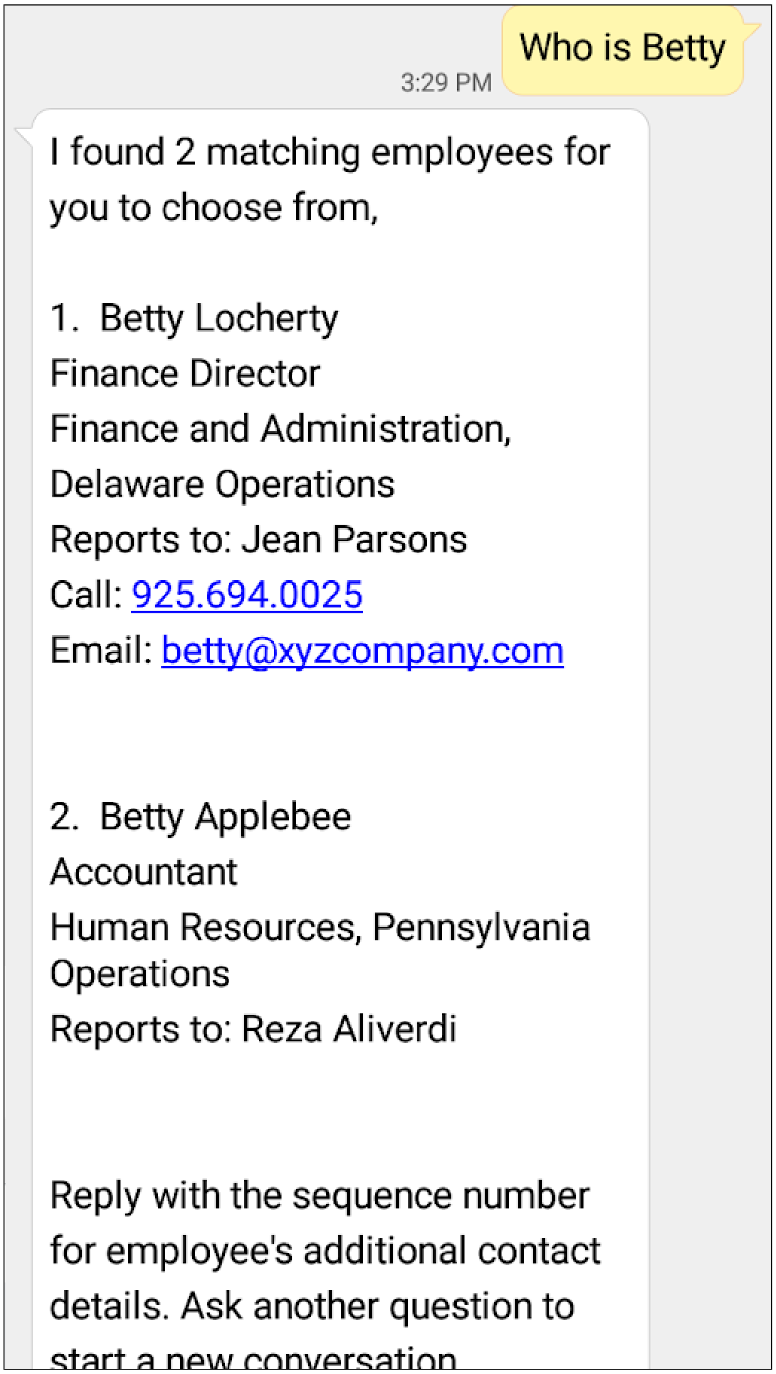
To view this list again, enter a greeting or a search string such a "*hello*", "*what can you do*", or a similar text.

Making an Inquiry and Viewing Results

When you send a text request inquiry, the Employee Directory Assistant retrieves a set of results based on the message you entered. For example, if you asked where a person works, the Employee Directory Assistant will return business address information for people that match your inquiry.

Note: You do not need to enter question marks (?) when making an inquiry or add an apostrophe (') when using a name. For example, you can enter the following inquiry without punctuation marks:
what is johns phone number

This example illustrates the Employee Directory Assistant when texting a question about a person and it responds with the number of people that match that request. In this example, there are two people in the company directory that match the request.



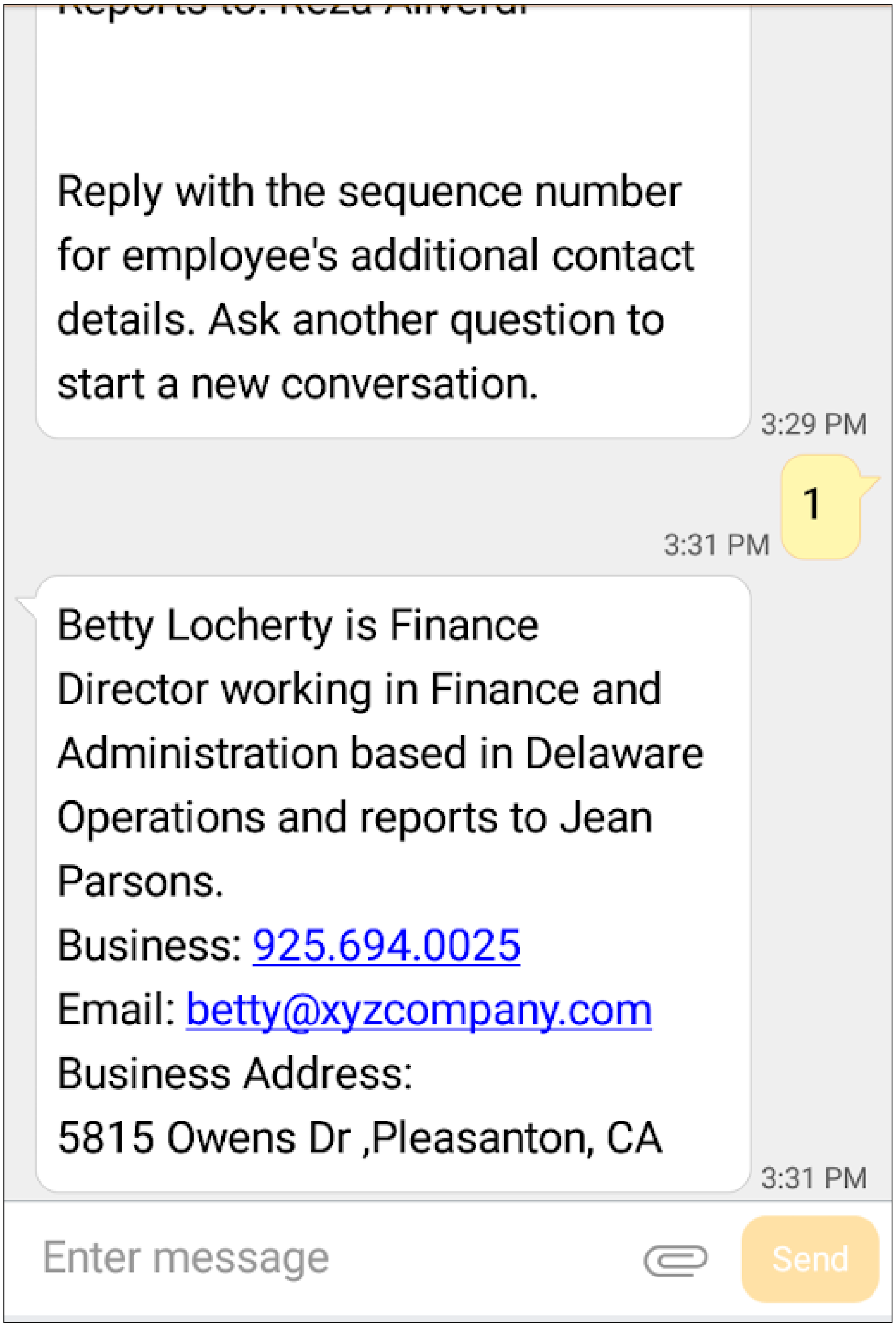
The Employee Directory Assistant will display the number of matches it made for your direct inquiry question, a sequential numbered list of individuals matching the search, and information on how to select an employee or view more information.

Note: The Employee Directory Assistant will show up to five vertical responses at a time. When there are more than five matches, the end of the response will include directions to type 'next' to see the next five matches. The administrator can change the number of results that display in the conversational flow.

When there are multiple results for a search inquiry, the results are ranked based on the logged in user's department and location, in descending order. For instance, if a user enters an inquiry for *john* and there are multiple individuals in the directory with that name, the Employee Directory Assistant will display any *john* who works in the user's department first, followed by any *john* who works in the user's location.

Select the sequence number of an employee to view more details.

This example displays the results after selecting the sequence number of the employee.

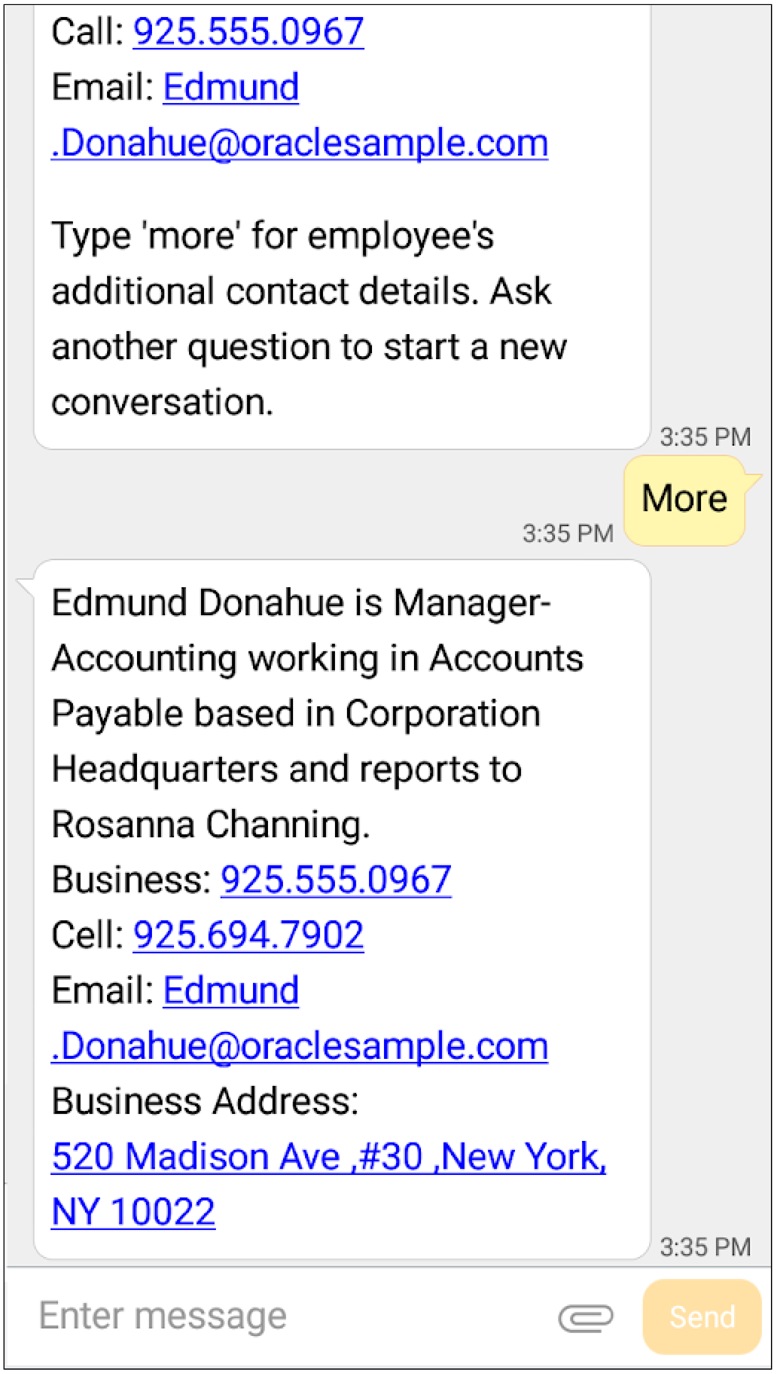


After you enter a reply to a response, you cannot go back and enter information pertaining to a previous text. All replies must be in response to the most recent text. In the example shown here, you entered sequence number *1* to view Betty Locherty's information. Now, if you enter number *2* to see details for

Betty Applebee, the Employee Directory Assistant will reply that is does not understand your request. To see Betty Applebee's information, you will need to submit a new request.

When there is a single match response to an inquiry, the instructional text at the bottom of the message gives you the option to view additional details by texting "*more*".

This example displays the results after responding with 'more' and the Employee Directory Assistant provides additional information about the employee.



The Employee Directory Assistant may also provide links that you can click to contact the person.

Note: The display of information as a hyperlink is dependent on the text client. If the text client supports hyperlinks for phone, email ID, and websites, it will be displayed as such.

Making Invalid Inquiries

Occasionally you may enter information that is incorrect, is not understood, or is not supported by the Employee Directory Assistant. The Employee Directory Assistant will indicate that you need to rephrase your request or it will state that it does not understand your question.

For guidelines on what the Employee Directory Assistant can answer, enter another greeting or ask what it can do to retrieve the list of supported requests. Do not respond with the text "*help*".

Warning! The following opt-out words are not supported for the Employee Directory Assistant:
—*Start*
—*Help*
—*Stop*
These words, which users may use in your digital assistant, are default keywords in Twilio. If a user enters one of these words in a Twilio channel, the Twilio conversation will end and the digital assistant will not receive the input.

Chapter 27

(USF) Administering Personnel Action Requests

Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note: Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.
- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Common Elements Used to Administer Personnel Action Requests

Field or Control	Description
PAR Status	The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing. If you aren't ready to submit the request, change the status to *Initiated,* and keep working on it until you're done. Change the status to *Requested* to submit it. After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request. Once you assign the status of *Processed by HR,* the request becomes an actual event and is posted in the system to interface with PeopleSoft Payroll, Manage Base Benefits, or other related areas. If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender.*

Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the component, information for that same employee appears automatically.

Related Links

“Setting Up Federal HCM Control Tables” (Application Fundamentals)
“Understanding WIP Management System Setup” (Application Fundamentals)
Add Employment Instance USF - Data Control Page

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. Workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests, and provides options along the way for more time, further information, or returning to sender. Workflow then sends requests on to human resources for final processing. The automated workflow process ensures that the action request goes through all the reviews your agency needs until it becomes an actual event.

Related Links

"General Workflow Information" (Application Fundamentals)

Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Note: The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both.

Your agency determines the actions and data available to employees, supervisors, and human resources officials. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Actions also include returning an action to the originator; asking for more information; or withdrawing, cancelling, or correcting an action. Decisions on these issues are implemented using the Approval Flow component (GVT_WIP_ACTIVITY).

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

Related Links

Adding an Employment Instance

Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated.* While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested.* By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *Processed* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information.* Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it is still in a work-in-progress state.

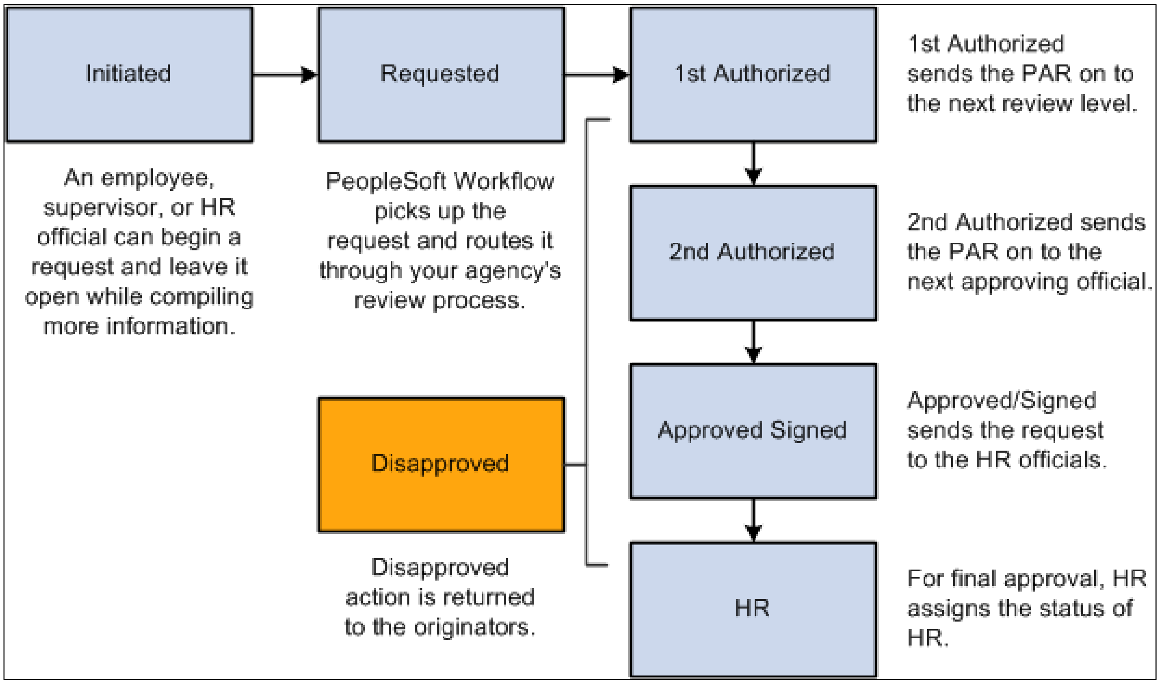
Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don't have the ability to change request data, if a request needs to be *Cancelled,* you must return it to the originator.

When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

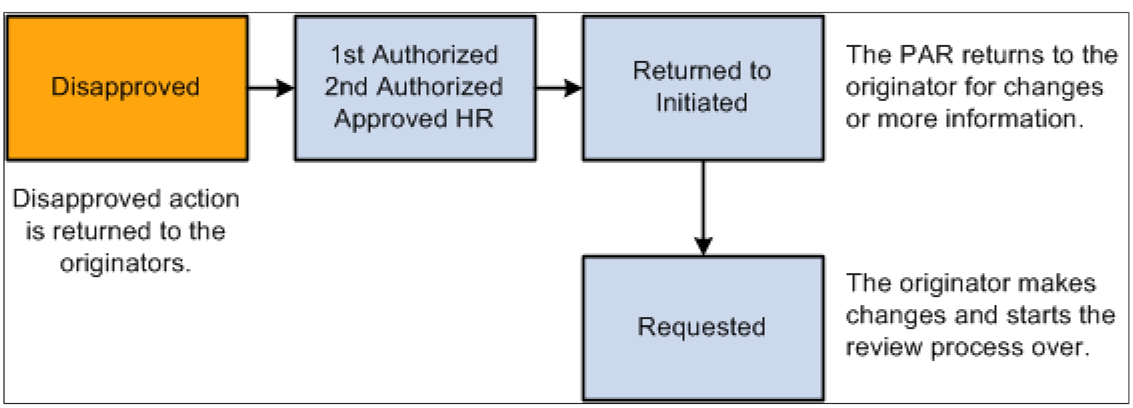
An Overview of PAR

This illustration shows an overview of a sample process. In this example, an employee, supervisor, or HR official initiates the PAR and submits it for approval. The PAR then goes through multiple levels of authorization before it is either approved or denied:



Disapproving or Returning a Request

This illustration provides an example of a business process when a request is disapproved. In this example, the request is put back in the Initiated state so that the originator can modify it as necessary and resubmit it. The resubmitted request then goes through the standard approval cycle again:



Note: Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

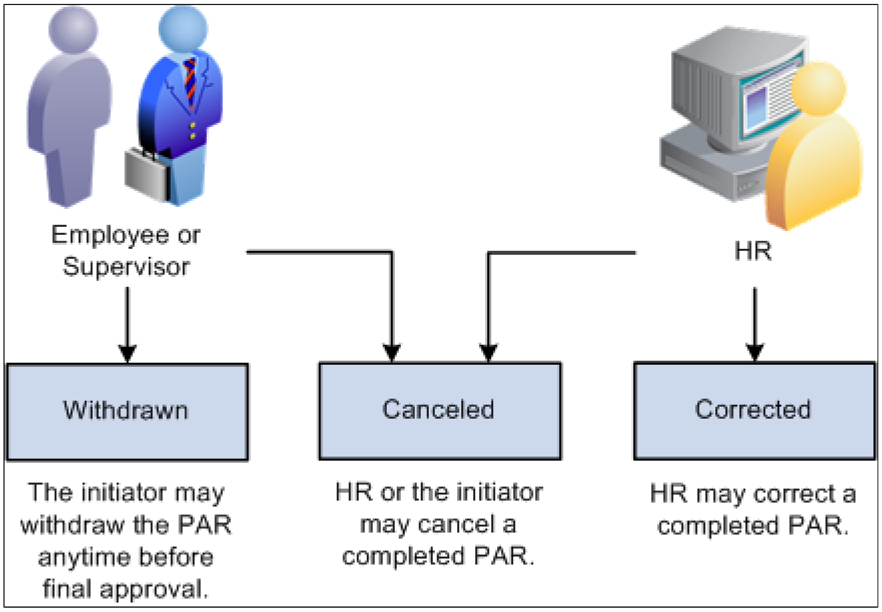
Cancellation, Correction, or Withdrawal of a Request

Requests can be cancelled, withdrawn, or corrected only in specific situations:

- Any time before final approval, the initiator can withdraw the request.

- Once the request is approved, either the initiator or HR can cancel the requests, but only HR can correct the completed request.

The following diagram shows who can cancel, correct, or withdraw a request:



Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In- Progress Status	***PAR Status Code***	***Definition***
Initiated	*INI*	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of *Initiated,* originators can leave the request open until it is ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of *Initiated* to designate that their work is in progress.

Work-In- Progress Status	***PAR Status Code***	***Definition***
Requested	*REQ*	To submit a request, assign a status of *Requested.* Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/ benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	*1st*	The first-level reviewer assigns a status of *1st Authorized* to send a request forward to the next review level.
2nd Authorized	*2nd*	A first-level reviewer sends a request forward to the next review level by assigning a status of *2nd Authorized.*
Approved/Signed	*SIG*	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of *Approved/ Signed.*
Processed By Human Resources	*PRO*	Only human resources officials can assign the status of *Processed By Human Resources.* They first review and complete the request and may add the appropriate nature-of-action code, legal authorities, and remarks. They indicate final approval by assigning the status of PRO. The request then becomes an actual event. A status of PRO is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.

Work-In- Progress Status	***PAR Status Code***	***Definition***
Return for More Information	*RET*	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of *Returned for More Information* and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of *Requested,* and the process begins again.
Withdrawn	*WTH*	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed. **Note:** A request cannot be withdrawn after it has been either processed or disapproved.
Disapproved	*DIS*	At any point in the process, a reviewer can disapprove a request by assigning a status of *Disapproved* and entering the reason in the **Comments** field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	*COR*	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.

Work-In- Progress Status	***PAR Status Code***	***Definition***
Cancelled	*CAN*	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The *Cancelled* status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of *Cancelled.*

Related Links

"General Workflow Information" (Application Fundamentals)

Processing of PAR Actions

The PeopleSoft Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, a row is inserted into all three records when a user inserts a row on the Data Control page.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of the updates to the other tables.

However, if the PAR action has an effective date that is later then the system date, only JOB is updated when the action is saved. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date.

Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which is reviewed in this topic. Other topics of this book cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

Related Links

Adding an Employment Instance
Understanding PARs

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click **Work It!,** and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the same page on which the initiator entered data, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized, 2nd Authorized,* or *Approved/Signed.* The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the **PAR Status** code to *Return for More Information* or *Disapproved.*

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Processing Human Resources Personnel Actions

Once a Personnel Action request (PAR) has been through the initiation and request process and has passed the authorization and approval processes, it goes to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials and as a result contain overviews, controls, and additional navigational capacity. The HR Processing pages enable you to *access* personnel actions, *view* data, *finalize* actions, and *print* reports.

The HR Processing (USF) component is similar to the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, however the HR Processing (USF) component contains additional PAR Status options.

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR,* it remains as a record in the system. However, it is possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction or cancellation.

Only processed rows are available for correction or cancellation. If an employee has an unprocessed transaction, you will be unable to correct or cancel a previous transaction until all of the employee's unprocessed rows have been successfully processed.

To access a processed request that you want to correct:

1. Open a new request in the Data Control page of the Correct Personnel Action USF component.
2. Click the **Insert Row** button to insert a new row, and enter the correct data.

   The system automatically enters a PAR Status of *COR.*
3. If you insert a row and a more current transaction exists, the **Reviewed** check box is displayed and is highlighted in blue. This check box serves to alert you to review the additional transaction for errors and to select the check box after you review or change it. An error message is displayed if you try to save the page without first selecting the **Reviewed** check box.

   Note: The **Reviewed** check box is also displayed on the Data Control page of the HR Processing USF component.

Note: Be careful when updating data using correction mode, particularly on processed personnel actions. Federal business process specifies that if corrections are made to existing data rows, a Correction SF50 is required. In this case, do not use HR Processing USF component, but rather the Correct Personnel Action USF component.

To access a processed request that you want to cancel:

1. Open the row of information to be canceled in the Cancel Personnel Action USF component.
2. Change the PAR work-in-progress status to *CAN* (Cancelled).
3. The Cancellation Details page appears. Enter additional cancellation information about this transaction, such as the authority information or remarks.
4. Select **OK** to save the data on the Cancellation Details page.

5. Save the entry.

This will delete the data row from the HR Processing USF record and also the Job Data record.

Related Links

Adding an Employment Instance

Pages Used to Cancel a USF Personnel Action

Page Name	***Definition Name***	***Usage***
Cancellation Details Page	PAR_CANCEL_SEC	Enter cancellation details for a personnel action.

Cancellation Details Page

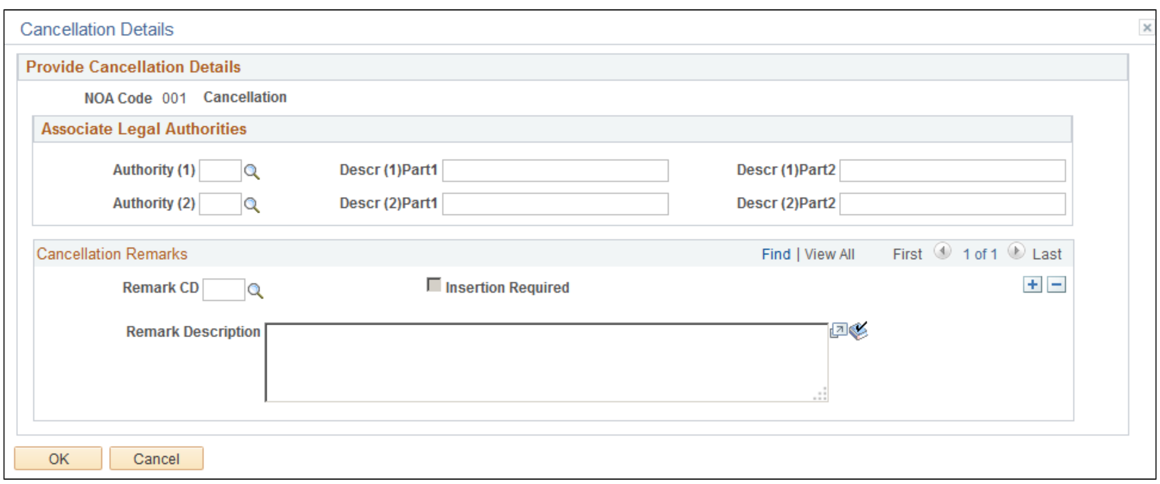
Use the Cancellation Details page (PAR_CANCEL_SEC) to enter cancellation details for a personnel action.

Navigation:

Workforce Administration > **Job Information** > **Cancel Personnel Action USF**

Enter *CAN* (Cancelled) in the **Par Status** field on the Data Control page.

This example illustrates the fields and controls on the Cancellation Details page.



Use this page to capture legal authority information and remarks associated with the cancellation.

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

These topics discuss how to print personnel action reports.

Pages Used to Print a Request for Personnel Action/Notice of Personnel Action

Page Name	***Definition Name***	***Usage***
Add Employment Instance USF - Data Control Page	GVT_JOB0	Print an action request (SF-52 of SF-50).
Notice of Personnel Action USF or Request Personnel Action USF - Parameters Page	RUNCTL_PAR	Print the official Notification of Personnel Action form or Request Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.
Notice of Personnel Action USF or Request Personnel Action USF - Select Data Page	RUNCTL_PAR2	Use the Select Data page to select employee data for printing PARs, after filtering the data with the parameters defined on the Parameters page,

Add Employment Instance USF - Data Control Page

Use the Data Control page (GVT_JOB0) to print an action request (SF-52 or SF-50).

Navigation:

- **Workforce Administration** > **Job Information** > **Add Employment Instance USF**

  On the Add Employment Instance USF page, enter a Person ID and click the **Add** button.
- **Workforce Administration** > **Job Information** > **Employee Request USF** > **Data Control**
- **Workforce Administration** > **Job Information** > **Supervisor Request USF** > **Data Control**
- **Workforce Administration** > **Job Information** > **HR Processing USF** > **Data Control**
- **Workforce Administration** > **Job Information** > **Correct Personnel Action USF** > **Data Control**

- **Workforce Administration** > **Job Information** > **Cancel Personnel Action USF** > **Data Control**

To produce a printed Request for Personnel Action form (SF-52), click the **Print SF-52** button. To produce a printed Notice of Personnel Action form (SF-50), click the **Print SF-50** button. The system asks whether to print the SF-52 or SF-50 to the Web or to a file. If you choose File, you must specify the file location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 or SF-50 and become part of the official audit trail for this action, should select the **Override Opr EmplID** check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Information page.

If you want to print to a file, specify the name of the output file (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR.*

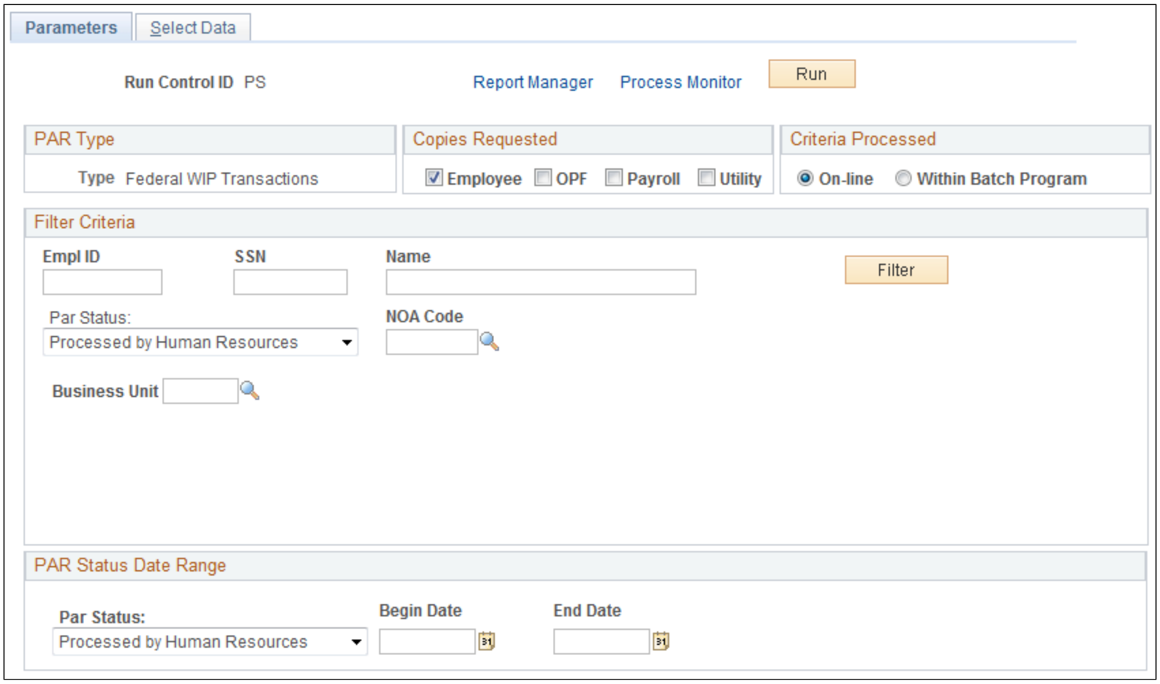
Notice of Personnel Action USF or Request Personnel Action USF - Parameters Page

Use the Notice of Personnel Action USF or Request Personnel Action USF- Parameters page (RUNCTL_PAR) to print the official Notification of Personnel Action form (SF-50) or Request for Personnel Action form (SF-52) used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.

Navigation:

- **Workforce Administration** > **Job Information** > **Reports** > **Notice of Personnel Action USF** > **Parameters**
- **Workforce Administration** > **Job Information** > **Reports** > **Request Personnel Action USF** > **Parameters**

This example illustrates the fields and controls on the Parameters page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
PAR Type (personnel action request)	Indicates the type of PAR that you want to print.
Copies Requested	This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are **Employee, OPF, Payroll,** and **Utility.**
On-line	Select if you want to immediately print the PARs you select.
Within Batch Program	Select if you want to save your filtering criteria for later processing.
EmplID (employee ID), **SSN** (social security number), **Name, PAR Status, NOA Code** (nature of action), and **Business Unit**	Filter actions by employee ID, employee social security number, PAR status, NOA code, or business unit.
PAR Status	To filter by PAR status, select a status. The **Begin Date** and **End Date** fields become available when you select a PAR status.
Filter	When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

The report will populate the Academic Discipline block 47 under certain circumstances. The report uses the following rules to determine if it should display a value in block 47:

- This block is populated when the education level shown in block 45 indicates a completion of any of these values:
  - A terminal occupational program (code 06)
  - An associate degree (code 10)
  - A bachelor's or higher degree (code 13 or higher)
- This block is left blank when block 45 is blank or contains codes 01-05, 07-09, 11, or 12.

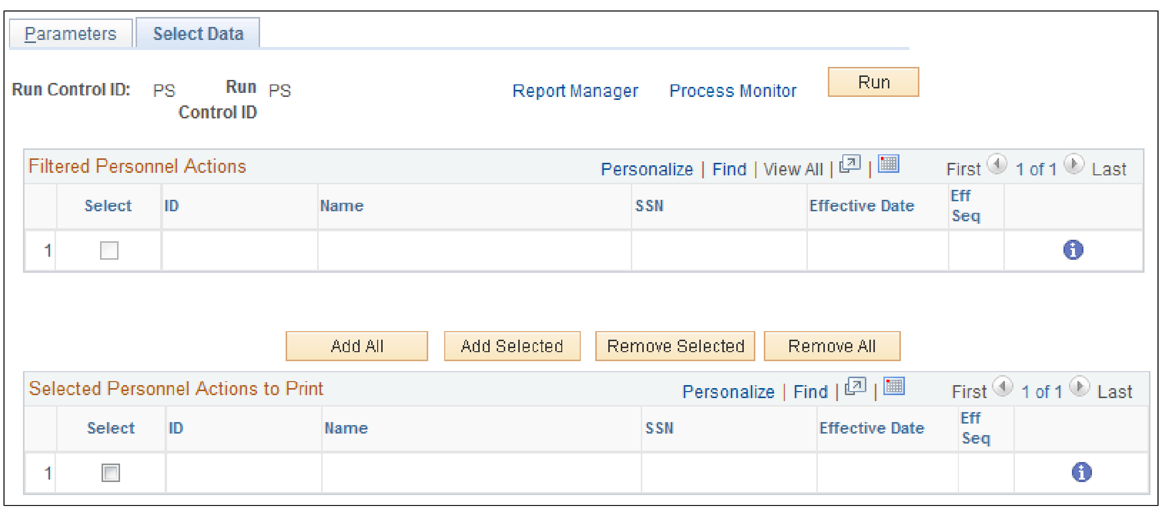
Notice of Personnel Action USF or Request Personnel Action USF - Select Data Page

Use the Notice of Personnel Action USF or Request Personnel Action USF - Select Data page (RUNCTL_PAR2) to select employee data for printing PARs, after filtering the data with the parameters defined on the Parameters page.

Navigation:

- **Workforce Administration** > **Job Information** > **Reports** > **Notice of Personnel Action USF** > **Select Data**
- **Workforce Administration** > **Job Information** > **Reports** > **Request Personnel Action USF** > **Select Data**

This example illustrates the fields and controls on the Select Data page. You can find definitions for the fields and controls later on this page.



The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list in the Selected Personnel Actions to Print group box when you click the **Add Selected** button. Click the **Add All** button to add all of the PARs to the list without selecting any check boxes. These PARs print when you run the report.

If you want to remove any of the PARs in the Selected Personnel Actions to Print group box, select the check box at the beginning of each data row and click the **Remove Selected** button. Click the **Remove All** button to remove all PARs without selecting the check box on any row.

Field or Control	*Description*
	Click this button to view the values of all of the filter criteria for this PAR.
Add All	Click this button to add all PARs that are in the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.
Add Selected	Click this button to add the selected PARs from the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.
Remove Selected	Click this button to remove selected PARs from the Selected Personnel Actions to Print group box.
Remove All	Click this button to remove all PARs from the Selected Personnel Actions to Print group box.

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

Related Links

Using the Org Chart Viewer
Viewing Worker Job History
(USF) Viewing Employee Personal and Job Data
Viewing Other Summary Pages in PeopleSoft Human Resources

Generating a Personnel Action History Report

This topic discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the Run Control page. It prints the following information:

- Employee name.
- Department.

- Effective date.
- Reason for the action.

For each employee the report lists:

- Original hire date.
- Total years of service.
- Employee type.
- Regular/temporary.
- Full/part-time.
- Job code and title.
- Salary grade.
- Compensation rate associated with the action.
- Supervisor's name.

Page Used to Run the Personnel Actions History Report

Page Name	***Definition Name***	***Usage***
Personnel Actions History USF Page	RUNCTL_FGHR017	Run the Personnel Actions History report (FGHR017).

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage/Separation USF component to enter setup information.
2. Use the Print Wage/Separation USF component to generate the actual report.

These topics discuss how to:

- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

Pages Used to Set Up and Run the ES-931 Wage and Separation Report

Page Name	***Definition Name***	***Usage***
Setup Wage/Separation USF - Identification Page	GVT_UCFE_PG	Enter ES-931 identification information for the wage and separation report. The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.
Setup Wage/Separation USF - Annual Leave Page	GVT_UCFE_PAY_PG	Enter ES-931 annual leave information for the wage and separation report.
Setup Wage/Separation USF - Severance Pay Page	GVT_UCFE_SEV_PG	Enter ES-931 severance pay information for the wage and separation report.
Print Wage/Separation USF Page	GVT_PRINT_ES931	Run the Print Wage/Separation report (ES931).

Setup Wage/Separation USF - Identification Page

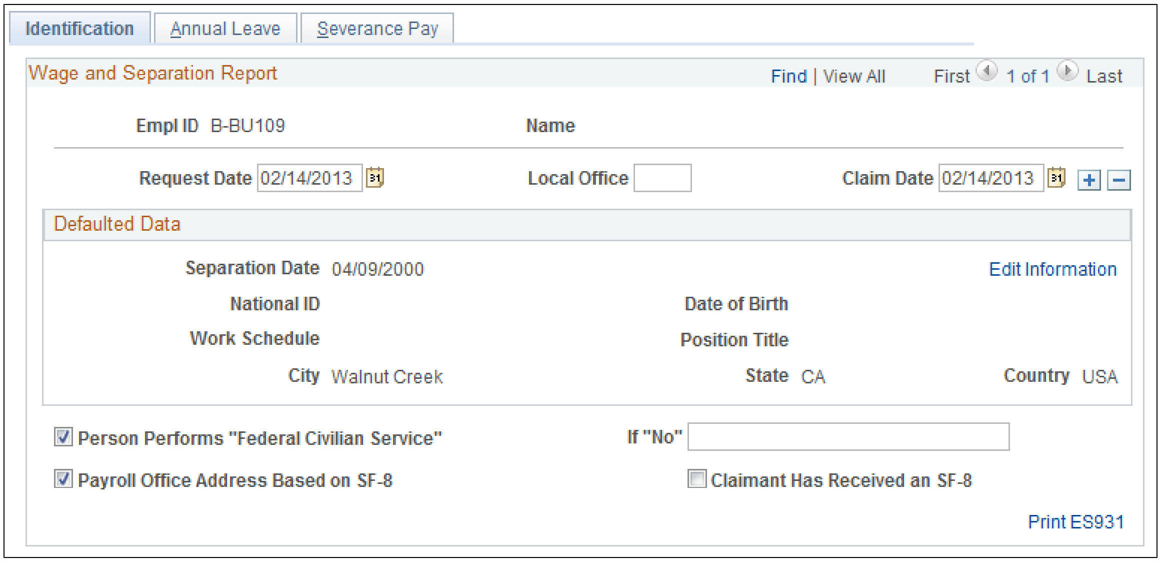
Use the Setup Wage/Separation USF - Identification page (GVT_UCFE_PG) to enter ES-931 identification information for the wage and separation report.

The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Setup Wage/Separation USF** > **Identification**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Identification page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Request Date	Enter the date the information was transmitted.
Local Office	Enter the numerical ID of the requesting/record holding office.
Claim Date	Enter the effective date of the claim.
Print ES931	Click to access the Print Wage and Separation component.
Does this person perform "Federal Civilian Service?"	Select if the employee performs Federal Civilian Service.
If No	If the employee does not perform Federal Civilian Service, enter an explanation.
Is payroll office address based on SF-8?	Select if the payroll office is based on an SF-8.
If No, has claimant received an SF-8?	Select if the payroll office is not based on an SF-8.

Defaulted Data

The information in this group box is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click the **Edit Information** link to make the fields accessible for edit.

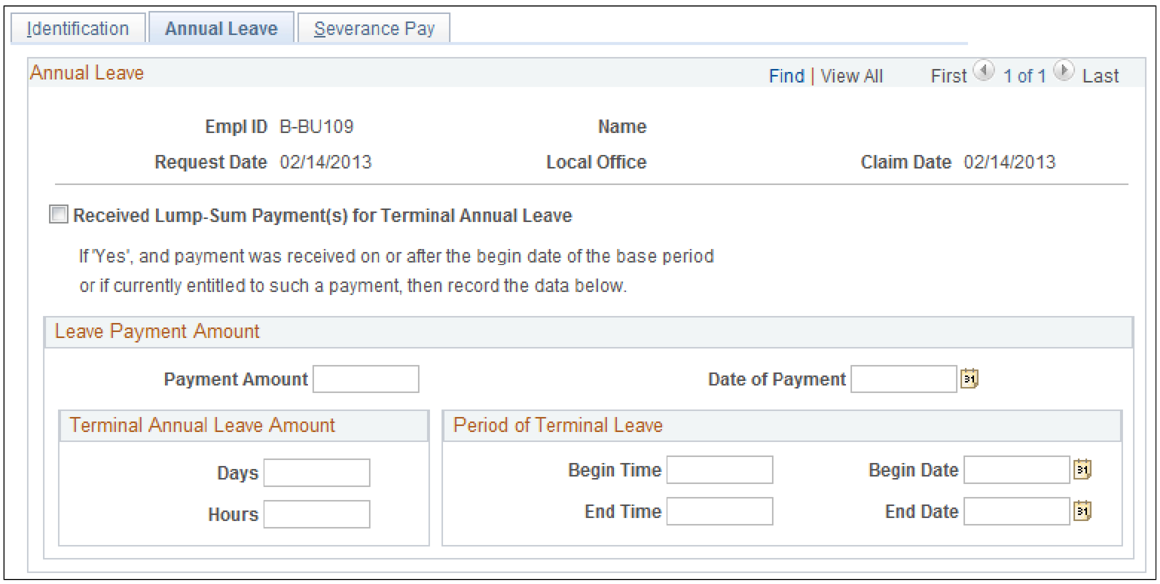
Setup Wage/Separation USF - Annual Leave Page

Use the Setup Wage/Separation USF - Annual Leave page (GVT_UCFE_PAY_PG) to enter ES-931 annual leave information for the wage and separation report.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Setup Wage/Separation USF** > **Annual Leave**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Annual Leave page. You can find definitions for the fields and controls later on this page.



If the employee received a lump-sum payment for terminal annual leave, select *Received a lump-sum payment(s) for terminal annual leave?*. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the Leave Payment Amount group box.

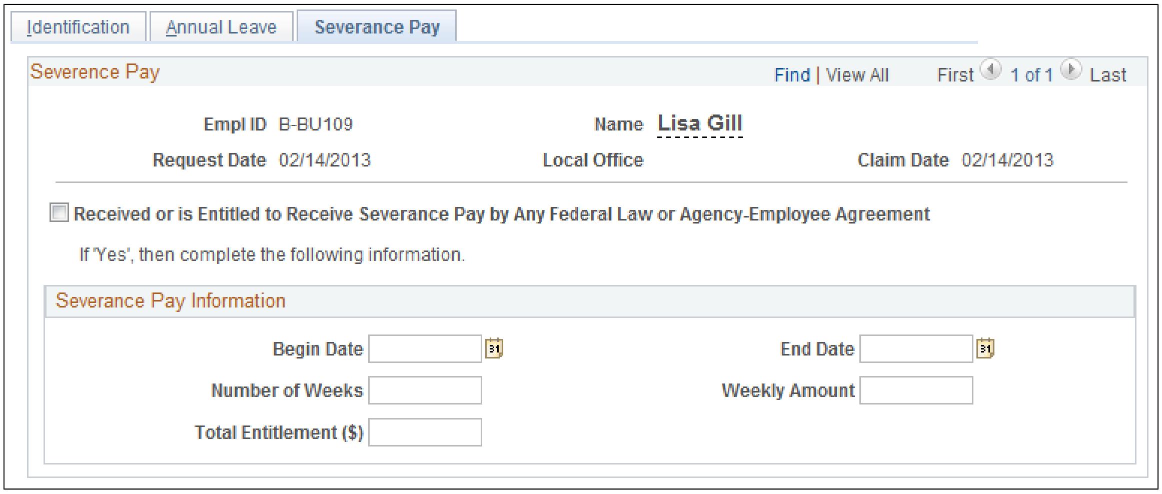
Setup Wage/Separation USF - Severance Pay Page

Use the Setup Wage/Separation USF - Severance Pay page (GVT_UCFE_SEV_PG) to enter ES-931 severance pay information for the wage and separation report.

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Setup Wage/Separation USF** > **Severance Pay**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Severance Pay page. You can find definitions for the fields and controls later on this page.



If the employee has received or is entitled to receive severance pay, select *Received or is entitled to receive severance pay by any Federal law or agency-employee agreement.* If selected, enter the related data in the Severance Pay Information group box.

Print Wage/Separation USF Page

Use the Print Wage/Separation USF page (GVT_PRINT_ES931) to run the Print Wage/Separation report (ES931).

Navigation:

Workforce Administration > **Job Information** > **Reports** > **Print Wage/Separation USF** > **Print Wage/Separation USF**

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

Chapter 28

(USF) Processing Personnel Action Requests

Understanding PARs

These topics discuss:

- PARs.
- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

Note: PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this documentation are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Human Resources. (Before requesting personnel actions, verify that you've selected the **Multiple Jobs Allowed** check box on the Installation Table - Product Specific page.)

Note: The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both.

Requests for updates that you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, you must choose Employee Request USF, Supervisor Request USF, or HR Processing USF, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action, and then go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

Related Links

"Setting Up Implementation Defaults" (Application Fundamentals)

Understanding U.S. Federal Hiring

Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	***Page***	***Submitted By***	***Routed To***
Accounting information	Compensation	Supervisors	Authorization
Agency transfer	Job	Supervisors	Authorization
Agency/subagency	Job	Supervisors	Authorization
Appointment/expiration data	Employment 1	Supervisors	Authorization
Awards	Data Control	Supervisors	Authorization
Benefits/retirement	Job	Supervisors	Authorization
Department reassignment	Job	Supervisors	Authorization
Departmental hierarchy (view only)	Job	Supervisors	Authorization
Draft status	Personal Data	Employees/Supervisors	HR department
Earnings	Compensation	Supervisors	Authorization
Employee type	Position	Supervisors	Authorization
Expected pay (view only)	Compensation	Supervisors	Authorization
FLSA status	Position	Supervisors	Authorization
Holiday schedule	Position	Supervisors	Authorization
Job code #	Job	Supervisors	Authorization
LEO position	Position	Supervisors	Authorization

Request Type	***Page***	***Submitted By***	***Routed To***
Locality/LEO adjustment	Compensation	Supervisors	Authorization
Location	Job	Supervisors	Authorization
Marital status	Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Personal Data	Employees/supervisors	Authorization
Military status	Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Personal Data	Employees/supervisors	Authorization
Nonpay data	Employment 2	Supervisors	Authorization
Other pay information	Compensation	Supervisors	Authorization
PAR remarks	Data Control	Supervisors	Authorization
Pay group/frequency	Position	Supervisors	Authorization
Pay plan/table/grade/step	Compensation	Supervisors	Authorization
Permanent/RIF/tenure	Employment 2	Supervisors	Authorization
POI	Position	Supervisors	Authorization
Position #	Job	Supervisors	Authorization
Probation dates	Employment 2	Supervisors	Authorization
Quoted pay data	Compensation	Supervisors	Authorization
Reports to position	Job	Supervisors	Authorization
Retained grade	Employment 2	Supervisors	Authorization
Review date	Employment 1	Supervisors	Authorization
Service computation dates	Employment 1	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
Service conversion dates	Employment 1	Supervisors	Authorization
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113G ceiling	Position	Supervisors	Authorization
Shift details	Position	Supervisors	Authorization
Tax location	Job	Supervisors	Authorization
Tracking (job) data	Data Control	Supervisors	Authorization
Union information	Employment 2	Supervisors	Authorization
Veteran's Info	Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Employment 1	Supervisors	Authorization
Work schedule	Position	Supervisors	Authorization

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement,* the employee status changes from *Active* to *Retired.* Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased.* The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

When you select the personnel action	***The system sets the employee status to***
Hire. Applicant hire. Rehire. Concurrent appointment. Detail assignment. End of detail. Terminate detail assignment. Return from LWOP. Return from disability (LWP). Recall from suspension/furlough. Intnl assignment.	*Active*
Leave with pay. Short-term disability. Long-term disability.	*Leave of Absence*
Paid leave of absence. Short-term disability with pay. Long-term disability with pay.	*Leave with Pay*
Retirement with pay.	*Retired with Pay*
Terminated with benefits. Terminated with pay.	*Terminated with Pay*
Furlough. Suspension.	*Suspended*
Retirement.	*Retired*
Intl assignment completion. Termination.	*Terminated*
Termination (reason of death).	*Deceased*

When you select the personnel action	***The system sets the employee status to***
Pay rate change. Change to lower grade. Data change. Earnings distribution change. Job reclassification. Position change. Probation. Completion of probation. Promotion Extension of NTE date. Award-monetary. Award-nonmonetary. Bonus. Reassignment/conversion. Family benefits change.	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*

When an employee status is set to *Active, Leave with Pay, Retired with Pay,* or *Terminated with Pay,* the system triggers payroll processing in PeopleSoft Payroll and PeopleSoft Payroll Interface.

If your agency uses PeopleSoft Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated.* You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefit Administration, and PeopleSoft Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

Importance of Effective Dates

You usually update employee job data in PeopleSoft Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. When you insert a new row on the Data Control page, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

If you want to work on the Employment Data 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then access the appropriate Employment page to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

Related Links

“Setting Up Federal HCM Control Tables” (Application Fundamentals)

“Understanding WIP Management System Setup” (Application Fundamentals)

Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note: The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

   Because it is the first action processed for this actual effective date, the **Transaction Nbr / Seq** field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promotion,* insert another data row.
7. Enter the same actual effective date as the first action.

The system enters a Transaction Nbr / Seq of *2/1*.

8. Continue the same steps required for the first action, entering a new action each time.

Note: If two name changes are submitted for the same person on the same day and a Personnelist logs on and navigates to Worklists, two entries are displayed (one for each name change request), but both link to the most recent request on the PAR pages. If the Personnelist approves and processes the second one but leaves the first one in REQ status, a warning message is displayed that indicates that the **Reviewed** check box should be selected before processing the request. This warning message alerts the Personnelist to review the possible impact of processing one request before others that are scheduled to take effect on the same day or in the future.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

“Understanding Data Permission Security for HCM” (Application Fundamentals)

Performing Common Personnel Actions

These topics discuss how to perform common personnel actions.

Pages Used to Perform Common Personnel Actions

Page Name	***Definition Name***	***Usage***
Supervisor Request USF- Data Control Page	GVT_JOB0	Enter information for the employee for whom you want to enter a personnel action.
Award Data Page	GVT_AWD_DATA	Assign an award to a federal employee and enter award, informational, and payroll details.

Award Data Page

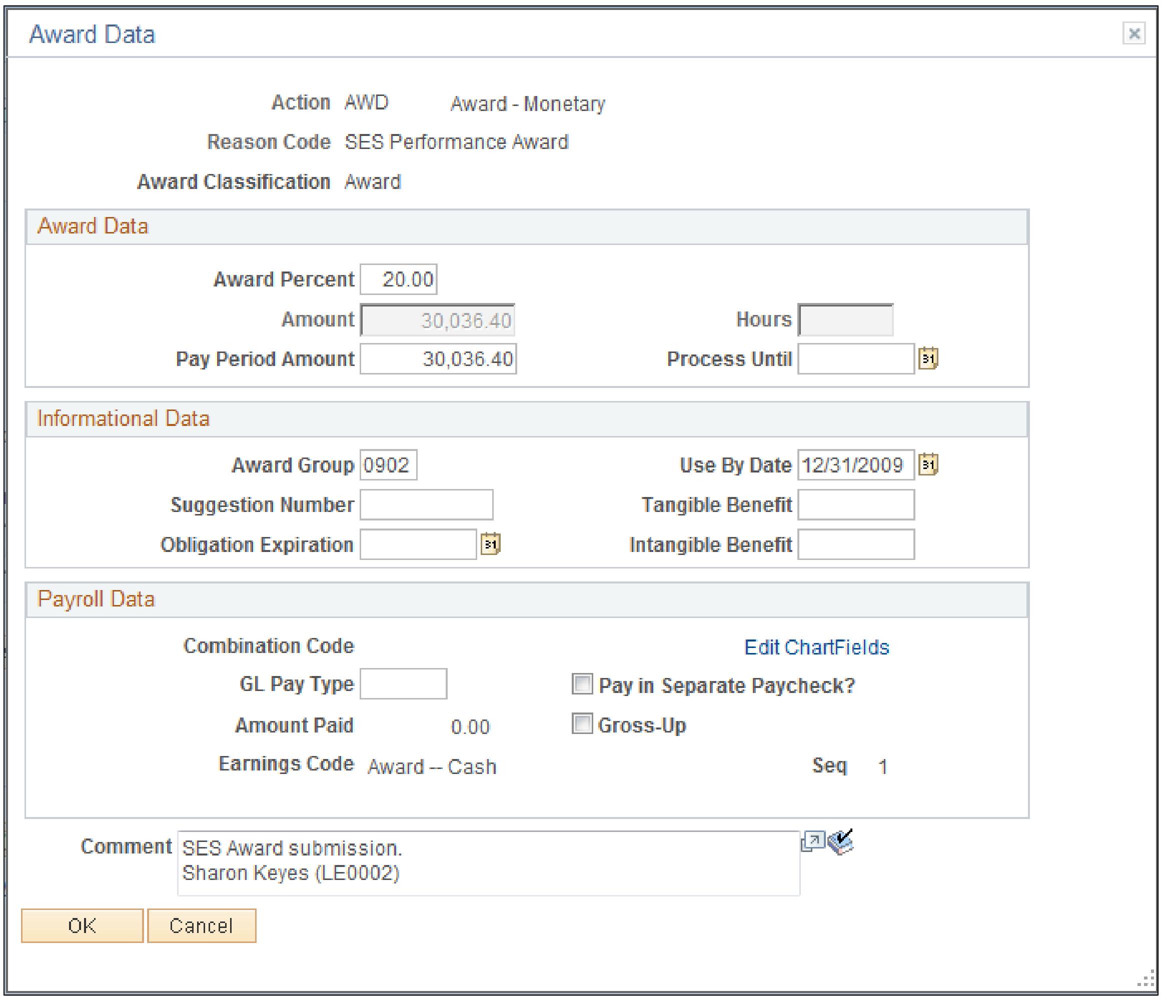
Use the Award Data page (GVT_AWD_DATA) to assign an award to a federal employee and enter award, informational, and payroll details.

Navigation:

Click the **Award Data** link on the Supervisor Request USF- Data Control page.

This link is available only when the **Action** field is *AWD* (award - monetary) or *BON* (bonus), and the **Reason Code** field is populated.

This example illustrates the fields and controls on the Award Data page. You can find definitions for the fields and controls later on this page.



Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Actions page **(Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Award Actions > Award Actions)** to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Supervisor Request - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control).**

   Submit your request the same as you would for other personnel actions.
3. Define the award setup using the Award Data page (click the **Award Data** link on the Supervisor Request - Data Control page).

Award Data

Field or Control	***Description***
Award Percent	Percent of pay to be paid as an award.
Award Code	NFC award code defaults from the Award Action definition.
Amount	Award amount granted.
Hours	Hours granted as an award.
Pay Period Amount and **Process Until**	Award amount paid each pay period until a specified date.

Informational Data

Field or Control	***Description***
From Date	Award begin date (NFC only).
To Date	Award end date (NFC only).

Payroll Data

Field or Control	***Description***
Combination Code, GL Pay Type, Amount Paid, Earnings Code, Pay In Separate Paycheck, and **Gross Up**	The information in these fields defaults from the Award Action definition.
Sub Agency Charged	The accounting station charged for cash award if not the employee's accounting station (NFC Only).

Field or Control	Description
Check Mail Address Indicator	Specify where NFC should mail an award check. For example, the award may not get mailed to the employee's address, but instead to an office for a ceremony (NFC Only).
Generate Payment	Select to generate the award payment (NFC Only).

Note: When you save this page, payroll data is written to the Additional Pay table for Payroll for North America customers only.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control)** and complete all fields.
2. When you are ready to submit the request, ensure that the PAR Status is *REQ.*

   The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed.* To correct or cancel the request after it has been completed and has a status of *HR Processed,* go to the Cancellation or Correction pages.

   The information you change on the Supervisor Request - Data Control page and other pages varies according to the data for the former job and the new job. You usually select a new job code or a new position number by moving to the Supervisor Request - Job Data page. But all of the other entries on this page could also conceivably change in the event of a promotion.

   Again, the information you change on the Supervisor Request - Job Data page may vary, but you usually select a new pay plan, table, grade, or step and enter (or generate) a new base pay.
3. Once you've completed all the changes caused by the promotion, if necessary, access other pages to enter relevant information.

   For example, access the Personal Data page to enter new business phone numbers. Or access the Position Data page to change the pay group or employee type, or to enter other relevant position details.
4. Change the position as necessary on the Supervisor Request - Job page **(Workforce Administration > Job Information > Supervisor Request USF > Job Data).**
5. Select a pay rate determinant on the Supervisor Request - Compensation Data page **(Workforce Administration > Job Information > Supervisor Request USF > Compensation Data).**

6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment Data 1 page **(Workforce Administration > Job Information > Supervisor Request USF > Employment Data 1)** as follows:

Actions	***Impact***
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WIGI status to *NA.* Sets the WIGI due date to *Blank.*

Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Access the Supervisor Request USF - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control)** to enter reassignment requests.

   Reassignments usually imply that there is no change in pay grade or compensation.

2. If this action is to occur on the same day as another action, insert that action's values in the**Transaction Nbr** and **Sequence**fields.

3. Enter a reassignment or conversion action.
4. Enter the reason code, such as an employee request or manager request.
5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).
6. Access the Supervisor Request USF - Job Data page **(Workforce Administration > Job Information > Supervisor Request USF > Job Data)** to enter additional changes for the employee being reassigned.

   Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.
7. Access other pages in the Supervisor Request USF component to enter any other employment or job information applicable to the reassignment.

   For example, you may need to go to the Supervisor Request USF - Personal Data page to enter a new phone number. On the Personal Data page, click the **Personal Phone Numbers** button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Access other pages, such as the Position Data page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent users from reassigning an employee into a department for which they don't have access, PeopleSoft Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

Related Links

Understanding Job Data
“Understanding PeopleSoft Security” (Application Fundamentals)

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Supervisor Request USF - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control)** to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non - Pay Data page (**Workforce Administration > Job Information > Supervisor Request USF > Employment Data 2** and click the **Non Pay Data** link) to enter leave of absence data for an employee.

In the **Last Date Worked** field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields **(SCD Hours, Probation Hours,** and **Career Tenure Hours),** as appropriate.

3. When an employee returned from leave, return to the Supervisor Request USF - Data Control page to change that employee's status to *active.*

   a. In the **Action** field, select *RFL* (return from leave without pay).

   b. In the **Reason Code** field, select *RFL* (return from leave).

   c. In the **PAR Status** field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.

   d. Access any other pages to make needed changes.

For more information, see the product documentation for *PeopleTools: Process Scheduler*

Initiating Phased Retirement Requests

On November 6, 2014, Office of Personnel Management (OPM) began accepting and processing phased retirement applications from agencies. Agencies implementing Phased Retirement are required to maintain data elements governed by OPM with prescribed details. The PeopleSoft HCM application enables federal agencies and employees to initiate Phased Retirement personnel action requests, complete approval steps, and generate CPDF reports.

Video: Image Highlights, PeopleSoft HCM Update Image 18: Phased Retirement for US Federal

When employees opt to participate in a phased retirement, you enter an Action value as *Phased Retirement* (PRT) on the Data Control page.

To enter a phased retirement request:

1. Request a phased retirement for an employee using the Supervisor Request USF - Data Control page (**Workforce Administration** > **Job Information** > **Supervisor Request USF** > **Data Control**).

2. From the Data Control page, perform the following actions:

   a. In the **Action** field, select *PRT* (Phased Employment/Phased Retirement).

   Note: In order to select an action of *PRT*, the **Enable Phased Retirement** check box must be selected on the Agency USF - “Default Settings Page” (Application Fundamentals) for the employee’s agency (**Set Up HCM** > **Foundation Tables** > **Organization** > **Agency USF** > **Default Settings**).

   b. Select a **Reason Code** value. Delivered reason codes are *PRT* (Phased Employment/Retirement) for employees opting for phased retirement, or *RFE* (Return to Full/Part Employment) for phased retirees returning to full/part employment.

   c. Enter an NOA code (nature of action code) for the action you indicated. Values include:

Action	***NOA Code***	***Description***
PRT (Phased Employment/Phased Retirement)	*615*	Phased Employment/Phased Retirement
RFE (Return to Full/Part Employment)	*616*	Opt Out Phased Retirement

d. Enter legal authority information for the NOA code. Values include:

Legal Authority Code	***Description***	***Mapping to NOA Code***
SAB	5 U.S.C 8336A (C) (7)	615
SAC	5 U.S.C 8412A (B) (6)	615
SAD	5 U.S.C 8336A (G)	616
SAE	5 U.S.C 8412A (G)	616

e. Select the **PAR Remarks** link to enter PAR remarks. The following remark codes are for the phased retirement personnel actions that are recorded on the Standard Form (SF) 50:

SF50 Remark Code	***Description***
M11	A change to the work schedule or the part-time hours worked during phased employment/phased retirement status will result in the termination of phased employment/phased retirement status and the phased retirement annuity.
M12	Employee may elect to enter full retirement status at any time by submitting application SF 2801 for CSRS or SF 3107 for FERS.
M13	If employee's phased retirement terminates for any reason the individual may not re-elect phased retirement.
M14	Employee is required to spend 20% of their time mentoring.
M15	FEHB/FEGLI benefits are not affected by phased employment/phased retirement.

SF50 Remark Code	***Description***
M16	The time spent in phased employment/retirement status will be credited as part-time service for annuity calculation purposes.
M17	Employee’s phased retirement annuity is terminated.
M18	Employee is entitled to a composite retirement annuity.
M19	Certify full time salary for FEGLI.

3. Access the Job Data page, and click the **FEGLI/Retirement/FICA** link to enter the **Annuitant Indicator** value.

   Annuitant indicator data elements help identify those employees who have opted out of phased retirement status. An employee who elects phased retirement may change his or her mind and opt out of phased retirement status at a later date. An employee who opts out of phased retirement status may never again elect phased retirement. The codes to track Phase Retirement data are:

Annuitant Indicator	***Long Name***	***Short Name***
W	Former CSRS Phased Retiree	F-CS-RET
M	Former FERS Phased Retiree	F-FE-RET
N	Former FERS Phased Retiree who is also a retired uniform service officer	FE-Officer
X	Former CSRS Phased Retiree who is also a retired uniform service officer	CS-Officer
P	Former FERS Phased Retiree who is also a retired uniform service enlisted	F-FE-Enlisted
Y	Former CSRS Phased Retiree who is also a retired uniform service enlisted	F-CS-Enlisted

4. Access the Position Data page, and indicate a work schedule of *Part-Time Phased Retiree* to differentiate an employee working part-time as a phased retiree from other employees working regular part-time schedules and to generate the appropriate FEHB and FEGLI premiums as applicable. For FEHB and FEGLI premium purposes, phased retirees are considered full-time employees. A schedule is required when an employee has elected *Phased Employment/Phased Retirement* status and has a less than full-time schedule with a working percentage of 50% on a pre-arranged tour of duty while receiving a phased retirement annuity.

5. Enter other information as needed per OPM such as standard hours and full-time/part-time status.

Phased Retirement PAR Transaction Approvals

Agencies can perform a phased retirement PAR transaction using the WIP status *REQ* (Requested), which uses a five-step approval process. Agencies can also opt to perform a phased retirement PAR transaction with fewer steps using the WIP status *RAS* (Route to Approve and Sign), which uses a three-step approach that submits the supervisor request, approve and sign, and HR processing PAR steps.

Phased Retiree Reporting

Agencies can run the Phased Retirees Details USF report (**Workforce Administration** > **Job Information** > **Reports** > **Phased Retiree Details USF**) to view current active phased retirees and create time framed reports for:

- Employees who opted for phased retirement.
- Phased retirees who returned to full/part-time employment
- Former phased retirees who retired.

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired.* The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Supervisor Request USF - Data Control page (**Workforce Administration** > **Job Information** > **Supervisor Request USF** > **Data Control**).

   The **Actual Effective Date** field defaults to the system date, usually today's date, which you can change.

   Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

   For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the **Action** field, select one of the following: *Termination, Terminated with Pay, Terminated with Benefits,* or *Retirement,* and then select a reason code for the departure, if applicable.

   Depending on the action you selected, the system changes the employee status from *Active* to *Terminated, Terminated with Benefits or Pay,* or *Retired.*

3. If the employee is suitable for rehire, save this page.

   When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note: The IRR process is used by agencies using PeopleSoft Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

Related Links

"Understanding the IRR Process" (PeopleSoft Payroll for North America)

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

Related Links

"Generating Supplemental or Correction IRRs" (PeopleSoft Payroll for North America)

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Supervisor Request USF - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control)** for the deceased employee.
2. In the **Action** field, indicate that the employee is *Terminated.*
3. In the **Reason Code** field, select *Death* as the reason for termination.

   The system automatically changes the **Employee Status** field from *Active* to *Deceased.*

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.* If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Supervisor Request USF - Data Control page **(Workforce Administration > Job Information > Supervisor Request USF > Data Control)** for the employee and request a rehire.

2. Access the other employee data pages to enter additional information.

Chapter 29

(USF) Using the PeopleSoft Fluid User Interface to Manage Personnel Action Requests

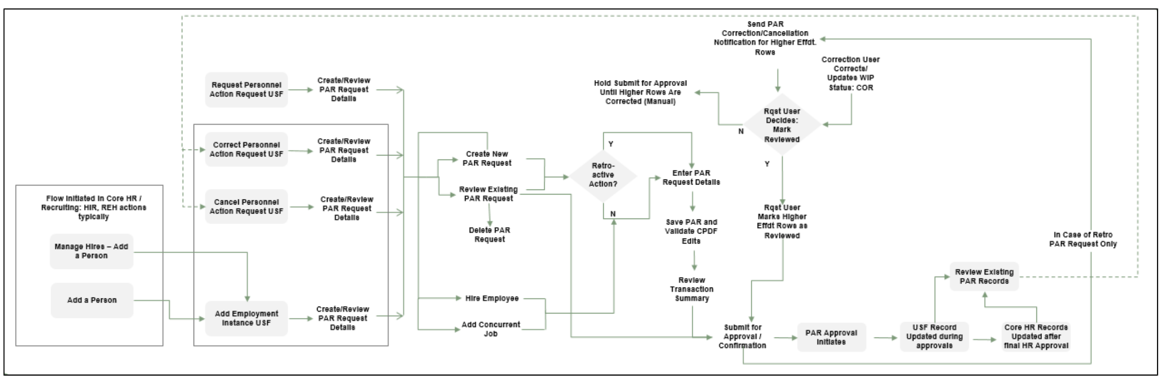
Understanding the PAR System

In an organization, the records of employees will have constant updates like hire, promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, the administrators regularly submit PARs for these changes in PeopleSoft Human Resources.

This topic provides an overview on how to use PeopleSoft Fluid User Interface to manage the Administrator PAR transactions for U.S Federal Government Agencies.

The fluid PAR interface provides a simple to use, intuitive application for Federal HR Administrators to perform various Federal Personnel Action Request transactions. Using the fluid Interface an administrator can quickly create, process and authorize the personnel action requests without navigating to multiple components. It provides you a guided way to enter data requests in a component using Activity Guide Framework and displays only the relevant fields, using the benefits of Page and Field Configurator utility. You can also easily configure multiple approval flows and view the synopsis of changes as an approver and as a requester.

The diagram shows a high level workflow for Administrator PAR transactions.



As a Federal HR Administrator, to create a PAR:

- Access the Create Personnel Action USF Tile from your homepage.
- Select the employee.
- Click the Create Personnel Action button.

- Enter the effective date. If you enter a past date (prior to the latest PAR row) as the effective date, system automatically identifies and process the request as retroactive personnel action request. For more information, see Creating a Retroactive PAR.
- Enter the PAR request details.
- Save PAR.
- Validate the request details and review errors, if any.
- Review the details using Transaction Summary before submitting for review. For information on configuring the fields to be displayed in Transaction Summary, see Defining Transaction Summary Configuration.

For more information on creating a Personnel Action Request, see Personnel Actions USF Page.

To approve a PAR:

- Access the Approvals tile from your homepage.
- Select the Personnel Action Request.
- Review the summary of changes to Approve, Deny, or Pushback the request.

For more information, see Authorizing and Approving Personnel Actions Using Fluid.

User Roles

Role	***Description***
PAR Requestor	This role is required for creating PAR requests through Create/ View Personnel Action Request page.
PAR Viewer	This role is required to access View Job Information functionality through Fluid Approvals.
PAR Analyst	This role is to be added to Correction and Cancellation users to receive Push Notification and Email Notification while performing Retroactive PAR Transaction through Create/View Personnel Action Request page. **Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications. Notifications delivered with HCM Image 48 or later must use Notification Composer. For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Role	***Description***
PAR Error Viewer	This role is required for accessing the View Edit Errors functionality through Fluid Approvals.
PAR 1st Authorizer	This role has been created to provide access to approve Fluid PAR requests at First Authorized level.
PAR 2nd Authorizer	This role has been created to provide access to approve Fluid PAR requests at Second Authorized level.
PAR Position Administrator	This role is required to carry out position administrator role for Federal PAR Approvals.
PAR Final Approver	This role is required to carry out final approval role for Federal PAR Approvals.
PAR AG Administrator	This role is required to make modifications to the Activity Guide (AG) template setup for Create/View Personnel Action Request functionality.
Federal PAR Administrator	This role is responsible for administering the Approval transactions of Federal Create/View Personnel Action Request functionality.
PAR Specialist	This role is required to Approve, Deny or Pushback the cancellation and correction request.

Permission List

Permission List	***Description***	***Objects / Pagelets***	***Roles Assigned***
HCCPFGPAR	Federal PAR Request	Administer Workforce USF Menu —Create/View Personnel Action —Review Job History —Related Information Guided Processes Menu —Grouplets —My Preferences —My Personalizations	PAR Requestor PAR Final Approver Federal PAR Administrator

Permission List	***Description***	***Objects / Pagelets***	***Roles Assigned***
HCCPFGPARERRS	Federal PAR Errors	Administer Workforce USF Menu —View Edit Errors	PAR Error Viewer
HCCPFGPARSUMMARY	Federal PAR Summary	Administer Workforce USF Menu —Personnel Search	PAR Requestor PAR Final Approver Federal PAR Administrator
HCCPFGVIEWJOBINFO	View Job Information	Administer Workforce USF Menu —Create/View Personnel Action —Review Job History —Personnel Search	PAR Viewer

Defining Transaction Summary Configuration

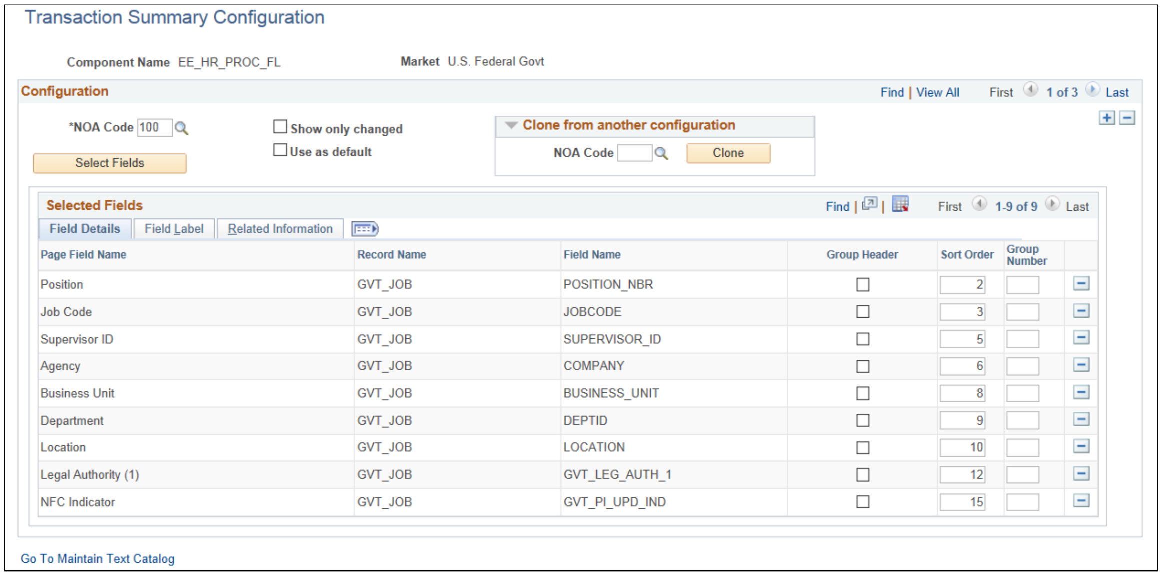
Transaction Summary page in the ‘Create Personnel Action Process’ displays the changes made by the user along with the existing data. This helps the users to review the changes before submission. As an administrator, you can configure the fields that need to be displayed based on the selected NOA code.

Use the Transaction Summary Configuration page to configure the fields to be displayed for each NOA code.

Navigation:

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Transaction Summary Configuration

This example illustrates the fields and controls on the Transaction Summary Configuration page.



Field or Control	***Description***
NOA Code	Select the Nature of Action Code(NOA). The fields in the Summary page will be displayed based on the configuration of the selected NOA code.
Show Only Changed	Use the “Show only changed” check box to list only the modified fields in the transaction summary page. On selecting the check box, only the modified fields, out of the selected fields in the configuration, would be displayed in the summary.
Use as default	Use the ‘Default’ check box to select one configuration as the default configuration. If no specific configuration is defined for a NOA code, this default configuration will be used to display the summary data.
Clone	Click the Clone button to copy configuration from another NOA Code. You can select the NOA code from which the configuration is copied.

Field or Control	*Description*
Select Fields	Click on "Select Fields" button to open the field selector component in a modal window. This modal window lists all the visible pages in the selected component and the fields corresponding to each pages. You can select the fields that needs to be added in the Transaction Summary Page. **Note:** Derived record fields, Related record fields and Invisible fields are excluded. For more information on configuring related fields, see 'Selected Fields — Related Information' section in this document.

Selected Fields — Field Details

In this section, the fields that are selected for Transaction Summary will be listed. You can add further configuration to these fields.

Field or Control	*Description*
Group Header and **Group Number**	You can select and group the fields to appear together in the Transaction Summary page. Select the check box to choose a field as a header for group. Enter the number of the group to which the field belongs in The Group Number field. For example, consider that you want to group Field A, Field B, and Field C and make Field A as the group header. In this case, enter '1' as the Group Number for Field A and put the same number for all the fields which you wish to include in the group. **Note:** If the group number of a header field is changed, then the group number of all the fields in that group will get updated. All members of the group should be from the same record, and the header must be a key field.
Sort order	Enter the order in which the fields to be displayed. When saved, the order number values will be updated to form a continuous sequence.

Selected Fields — Field Label

In this section, you can modify the existing label of the field.

Field or Control	*Description*
Override Label	Select the 'Override label' check box, if you want to override the existing label.
Text ID	Select the Text Id corresponding to the new label. Text Id field is enabled only if you select the 'Override label' check box. **Note:** Use the 'Go to Maintain Text Catalog' link to add a new Text Id.

Selected Fields — Related Information

In this section, you can configure which fields to be displayed as the related fields.

Field or Control	*Description*
Show Related Information	Select the check box if you want to display the related information along with the field in summary page.
Change Related Field	Click the button to open Related Information window. In the new window, you can select 'Choose from Page Fields' option (choose any of the listed record fields) or select 'Choose Other' and enter the field name directly. **Note:** This button is enabled only if you select the 'Show Related Information' check box.

Enabling Approvals for Canceling/Correcting a PAR

As an administrator you can enable Approvals for Cancellation/Correction of Personnel Action Request using Setup Process Definition page.

Note: By default, Approvals for Cancellation/Correction PAR will be disabled.

To enable Approvals:

- Access *Setup Process Definitions* page.
- Select the required **Process ID**.

  Select the **Process ID** as *FederalPARCancellation*, to set up Approvals for Cancellation PAR.

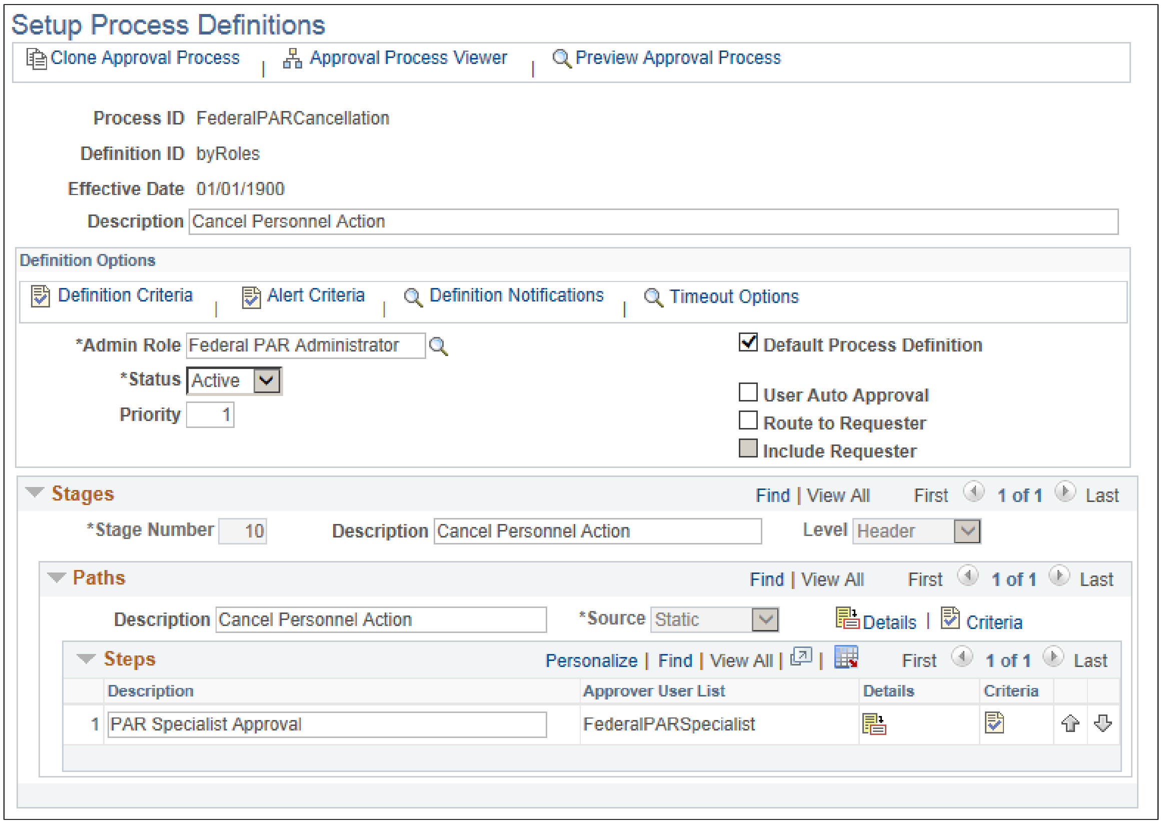
  Select the **Process ID** as *FederalPARCorrection*, to set up Approvals for Correction PAR.

- In the Setup Process Definitions page, update the **Status** field as *Active*. This indicates that the approval process is available for use.
- Save to apply the changes.

Navigation:

Enterprise Components, Approvals, Approvals, Approval Process Setup

This example illustrates the Setup Process Definition page when *FederalPARCancellation* is selected as the Process ID.



For more information on fields and controls of this page, see "Setup Process Definitions Page" (Approval Framework)

Creating Personnel Actions Using Fluid

To add, update, or change any employee data, U.S. Federal Government employees have to create a Personnel Actions Request (PAR). Following topics discuss on creating Personnel Action Requests for U.S. Federal government employees using PeopleSoft Fluid User Interface.

Pages Used to Create Personnel Actions Using Fluid

Page Name	***Definition Name***	***Usage***
Personnel Action USF Tile	HC_EE_REQUEST_FL_USF	View or initiate a Personnel Action Request in fluid.
Personnel Search Page	HC_EE_REQUEST_USF_FL	Search for a person for whom you want a to view or initiate a Personnel Action Request in fluid.
Personnel Actions USF Page	GVT_REQ_SCH_FL	View a list of Personnel Action Requests recorded for this employee.
Request Details Page	GVT_REQ_ADD_SCF	Initiate a new PAR transaction.
Approval Status Page	GVT_APVLCHAIN_SCF	View the approval status of a personnel action request.
Create/View Personnel Actions Activity Guide Framework	N/A	In the Create/View Personnel Actions fluid pages, the application follows the PeopleTools Activity Guide Framework. The Activity Guide shows the steps in the PAR process and provides navigation buttons for proceeding through the steps.
Request Data - Data Control Page	GVT_JOB0_FL	Enter information for the PAR process, such as the approving authorities, PAR remarks, and tracking information.
PAR Remarks Page	GVT_PAR_PROCES_SCF	Enter or look up comments specific to this position or employee situation.
Award Data Page	GVT_AWD_DATA_SCF	View or assign an award to a federal employee and enter award, informational, and payroll details.
Job Tracking Information Page	GVT_EE_CNTRL_SCF	View or enter job-tracking information.
Print Parameters Page	GVT_PAR_PRT_PA_SCF	Print the official Notification of Personnel Action form (SF-50) or Request for Personnel Action form (SF-52). These are used to notify employee and payroll office of the action, and to record the action in the Official Personnel Folder . It also provides a chronological record of actions that have occurred.

Page Name	***Definition Name***	***Usage***
Request Data - Personal Data Page	GVT_PERS_DATA1_FL	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran status, marital status, race of origin, and handicap status.
Address Information Page	GVT_ADDRINF_SCF	Enter home and mailing address information
Location Description Page	GVT_HOME_GEOLOCTN	View or enter the geographic location codes for the state, county or city.
Personal Phone Numbers Page	GVT_PERS_PH_SCF	Enter employee phone, fax, cellular, and other numbers.
Additional Birth Information Page	GVT_BRTHINF_SCF	Enter the employee's birth information.
Veterans Information Page	GVT_VETINF_SCF	Enter veterans information.
Marital Status Page	GVT_MARITAL_SCF	Enter marital information.
Educational Details Page	GVT_EDUCINF_SCF	View or enter schools attended and degrees completed by this employee.
Request Data - Job Related Data Page	GVT_JOB1_FL	Enter job information, including the employee's position, agency, and department.
FEGLI/Retirement/FICA Page (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SCF	Enter life insurance and retirement data.
Benefits/FEHB Data Page (Benefits / Federal Employees Health Benefits Data)	GVT_BENDATA_SCF	Specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources.
Departmental Hierarchy Page	GVT_DEPTINF_SCF	View departmental hierarchy for the individual's position.
Detail Assignment Page	GVT_DETAIL_SCF	Track information for employees on a detail assignment. You probably won't use this page when first hiring an employee.

Page Name	***Definition Name***	***Usage***
NFC Job Information Page	GVT_NFC_JOB_SCF	Track required National Finance Center (NFC) information for employees. Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.
Other Pay Information Page	GVT_OTH_PAY_SCF	Enter compensation that employees receive, in addition to the base pay.
Expected Pay Page	GVT_LOC_PAY_SCF	View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.
Accounting Information Page	GVT_JOBDIST_SCF	View a summary of the employee's job earnings distribution.
Request Data - Employment Data Page	GVT_EMPLOYMENT1_FL	Enter employment information, such as employee service computation and conversion dates, within-grade-increase data, union, probation, RIF, tenure, and security data.
Expiration Dates Page	GVT_EXPIRDT_SCF	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Data Page	GVT_APPDATA_SCF	Enter appointment limits and indicate if this person is in a special employment program.
Probation Dates Page	GVT_EMPL_PROB_SCF	Document any probation start and end dates that apply to this person.
Financial Disclosure Page	GVT_SECURTY_SCF	Indicate if financial disclosure is required and the due date.
Non - Pay Data Page	GVT_NONPAY_SCF	Track information related to a status of nonpay.
Time and Labor Data Page	TL_EMPL_DATAFG_SCF	Review or enter PeopleSoft time and labor data for this employee.
Validate Data Page	GVT_CPDF_FL	Initiate online regulatory edits for this PAR transaction and review edits and errors.

Page Name	***Definition Name***	***Usage***
Transaction Summary Page	GVT_SUMMARY_FL	Submit the PAR transaction request.
PAR for Review Page	GVT_PAR_RVW_FL	Use the PAR for Review page to view the higher dated action requests that are affected by the retroactive PAR.

Note: If the PAR is initiated for a Hire action, create an employee instance and save the Hire PAR request with **PAR Status** as INI (initiated) in the Add Employment Instance USF - Data Control page. For more information, see Adding an Employment Instance.
Later, access and submit the Hire request using the Create Personnel Actions page.

Personnel Action USF Tile

Use the Personnel Action USF tile to view or initiate a Personnel Action Request in fluid.

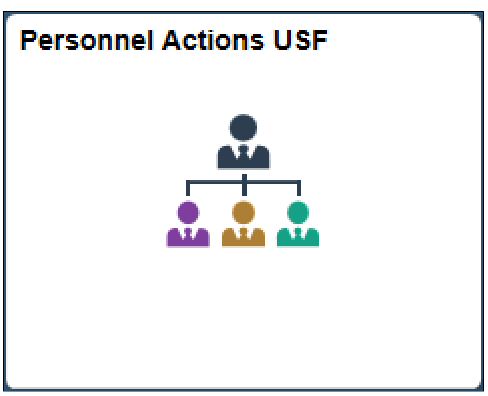
Navigation:

Select Fluid Home under the main menu. On the page that appears, select the *Workforce Administrator* home page.

The Personnel Action USF tile will not be displayed on the Workforce Administrator landing page by default, you need to manually added it. Once added, it will appear on the *Workforce Administrator* home page.

Note: 'Workforce Admin Homepage Fluid' role should be added to User Profile to have Workforce Administrator home page access.

This example illustrates the Personnel Action USF tile.



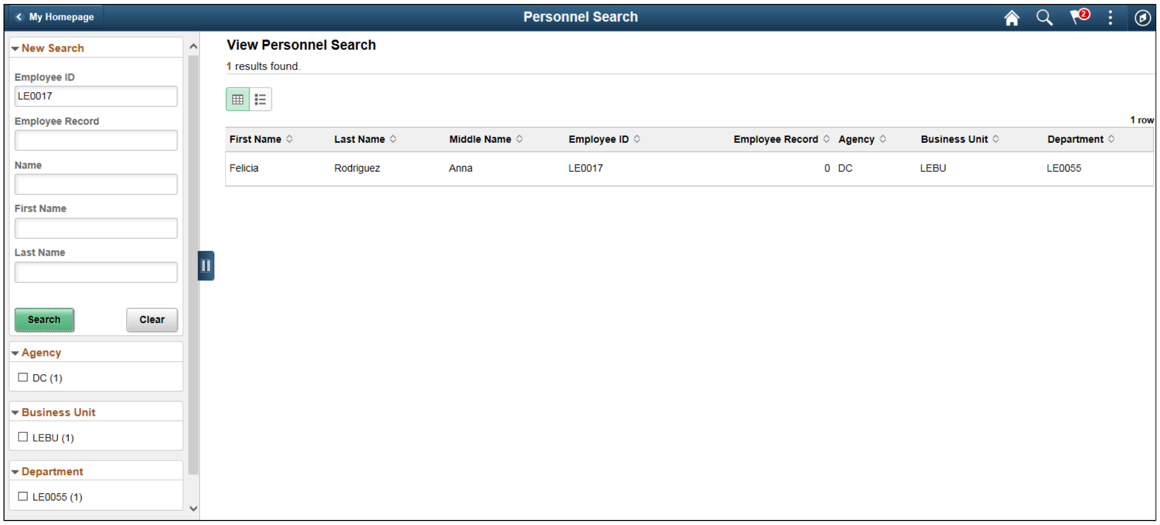
Personnel Search Page

Use the Personnel Search page (HC_EE_REQUEST_USF_FL) to search for a person for whom you want to view or initiate a Personnel Action Request in fluid.

Navigation:

- Click the Personnel Action USF Tile from the Workforce Administrator home page in fluid.
- **Workforce Administration** > **Job Information** > **Personnel Action USF** > **Personnel Search**

This example illustrates the fields and controls on the Personnel Search page.



Search Filters

Use the left search filter panel of the page to enter search or filter criteria to find a person. To enter partial searches, use the % wild card character.

Click the **Hide Filters** or **Show Filters** tab to close or open the filter panel. After you have entered filter criteria, click **Search**. The right panel will display the results of the search and the left search filter panel will display additional criteria that you can use to continue filtering your search by facets.

View Personnel Search

From the search results, select an employee to access.

The results list will display up to the number of rows defined in the **Max Rows in Pivot Grids** field on the PeopleTools Options page (PeopleTools, Utilities, Administration, PeopleTools Options). Click the sort arrows in the column headings to change the sort order.

Personnel Actions USF Page

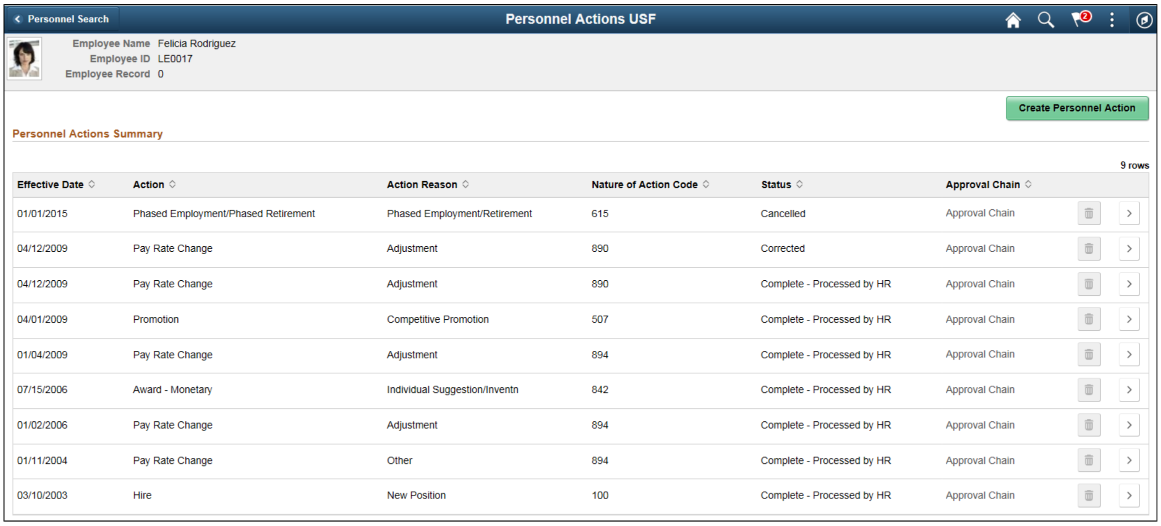
Use the Personnel Actions USF page (GVT_REQ_SCH_FL) to view a list of Personnel Action Requests recorded for this employee.

Navigation:

- Click the Personnel Action USF Tile from the Workforce Administrator home page, and then select an employee row from the Personnel Search Page.
- **Workforce Administration** > **Job Information** > **Create Personnel Action USF** > **Personnel Search**

Select an employee row from the Personnel Search Page.

This example illustrates the fields and controls on the Personnel Actions USF page.



Rows display in effective date order, most current at the top. Click the sort arrows in the column headings to change the sort order.

Field or Control	***Description***
Create Personnel Action	Click this button to initiate a new personnel action request which will open the Activity Guide. The user will start with the e Request Details Page
Status	Displays the status of the request within the PAR request/ approval process.
Approval Chain	When a request is In Progress, the Approval Chain appears as an active link. Click this link to open the Approval Status Page and view the approval chain and status of each reviewer. **Note:** Approval Chain will not be enabled for those rows which used old workflow
(Delete button)	Click this button to remove this row from the employee's job record. Delete button is enabled only for 'Saved' status rows. User will not be able to delete the data once submitted. Delete button will be disabled for this.
(View/Continue button)	Click this button to access the Request Data - Data Control Page and view or enter details for this job row.

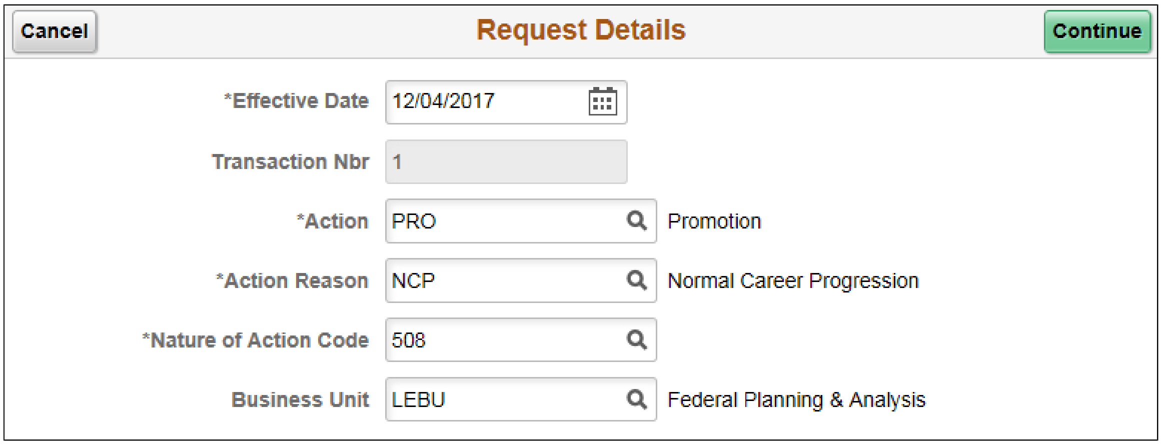
Request Details Page

Use the Request Details page (GVT_REQ_ADD_SCF) to initiate a new Personnel Action Request.

Navigation:

Click the **Create Personnel Action** button from the Personnel Actions USF Page.

This example illustrates the fields and controls on the Request Details page.



Field or Control	***Description***
Effective Date	Enter the effective date, which is used as the default effective date of the action throughout the system. You cannot change this date after you start. **Note:** You can also select a past date prior to the latest PAR row as effective date to initiate a retroactive personnel action request. For more information, see Creating a Retroactive PAR
Transaction Nbr (transaction number)	By default, the Transaction Number appears as ‘1’, for the first transaction. If there exists one more transaction on the same day, this number defaults to 2 and so on. Your agency can use these numbers to track the individual transactions for this employee that occur on the same day. This field controls the order in which actions are processed internally and the order in which they are output across interfaces.

Field or Control	***Description***
Action and **Action Reason**	Enter the reason and reason code for this employment instance, such as new position, temporary assignment, or trainee. **Note:** For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers into your agency from another agency, the action is *Hire* and the reason is *Transfer From* (another agency). When an employee transfers out of your agency to another agency, the action is *Terminate* and the reason is *Transfer To* (another agency).
Nature of Action Code	Select the federal numerical code defined to identify the nature of action that is occurring, such as an appointment or promotion. Nature of action codes are used for statistical and data processing purposes, such as Standard Form 52 or Standard Form 50, and are defined on the “Nature of Actions USF Page” (Application Fundamentals). See this page for more information on using and maintaining NOA codes.
Business Unit	Enter a business unit. The page will provide a Business Unit value by default based on the latest processed or corrected employment row of the employee, but you can update this value as needed.
Continue	Click this button to continue to the Request Data - Data Control Page and enter details for the employment instance.
Cancel	Click this button to cancel the new job instance and return to the Personnel Actions USF Page.

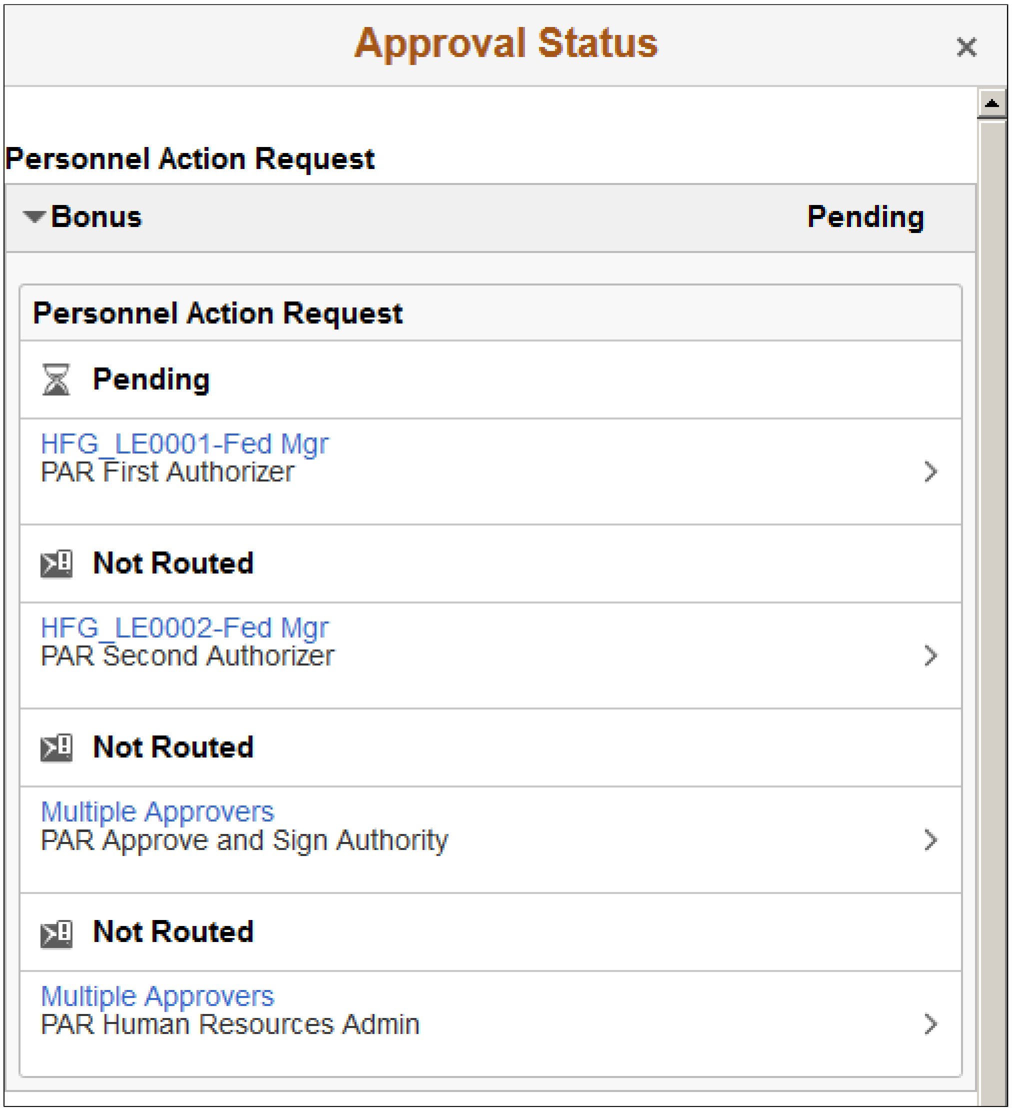
Approval Status Page

Use the Approval Status page (GVT_APVLCHAIN_SCF) to view the approval status of a personnel action request.

Navigation:

Click the **Approval Status** link from the Personnel Actions USF Page.

This example illustrates the fields and controls on the Approval Status page.



Click an individual approver row to view approver details such as the status of the request and contact information.

Click a row that says Multiple Approvers and review the approver chain. Here you can expand individual approver rows to view contact information.

Create/View Personnel Actions Activity Guide Framework

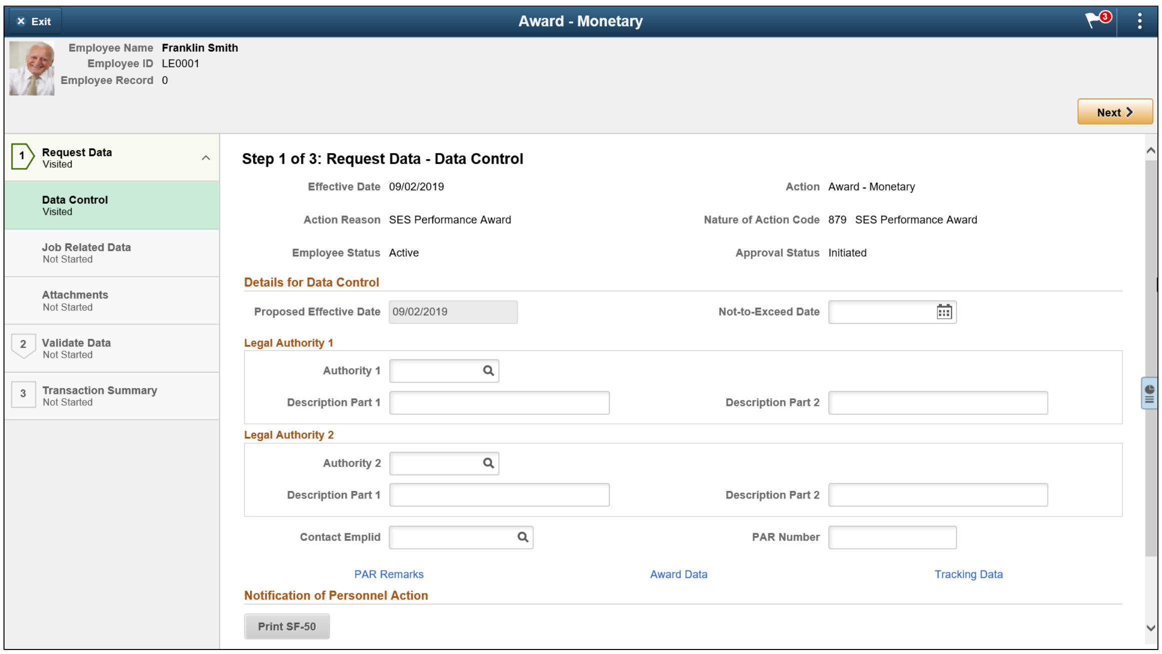
In the Create/View Personnel Actions fluid pages, the application appears within the context of a PeopleTools Activity Guide. It uses the Page and Field Configurator utility to display the steps a user has to perform. User can also control the visibility and availability of the fields based on the Nature of Action Code series.

For more information on Field and Page Configurator, see “Using Page and Field Configurator” (Enterprise Components)

The Activity Guide shows a list of application steps in the left panel and the page that corresponds to the current step in the main content area. The right panel displays related information and configurable reference links. The Activity Guide also provides navigation buttons in the page banner.

Note: Only a user with PAR AG Administrator role can access the AG template setup. *Create/View Personnel Actions* is the Activity Guide template that we have used. For more information on managing activity guide template, see PeopleTools: Creating and Maintaining Activity Guide Templates.

This example illustrates the Activity Guide framework within which the Create/View Personnel Actions pages appear.

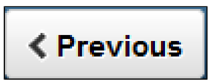
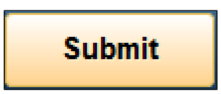


Note: Throughout this topic, the page illustrations show sections of the Create/View Personnel Actions process without the context of the Activity Guide step list. Even though the Activity Guide framework is not illustrated, remember that all steps appear within that framework.

Page Banner

The top of PeopleSoft pages is called the page banner. In other PeopleSoft applications, the banner displays several standard icon buttons. The banner will display the name of the transaction you are performing.

On most pages, users see the standard set of banner icon buttons.

Field or Control	***Description***
	Clicking this button exits the Create/View Personnel Actions data entry and review pages. If the user has not moved past the Request Data steps and saved, the system does not save the personnel action request. If you have saved the Request Data step (see the last substep of the Request Data step to save) before exiting, the request appears on the Personnel Actions USF Page as a saved (unsubmitted) request. The user can resume the request later.
	Clicking this button temporarily save the changes to the current substep and navigates to the previous step or substep. The button is not visible on the first step in the request.
	Clicking this button temporarily saves changes to a current substep and navigates to the next step or substep. You must save the changes in the Request Data step by accessing the last substep, before moving to the next step in the process. On the last step of the request (the Transaction Summary step), the **Next** button is replaced by a **Submit** button.
	This button appears only on the Transaction Summary step. Click this button to submit the request. The user cannot make any further changes to the request after submission. Request that have been submitted appear on the Personnel Actions USF Page with the status of *In Progress-Requested.* **Note:** If it's a Retro Transaction, 'Submit' button appears on 'PAR for Review' step.

Employee Information Page Header

A gray area under the main page banner displays contextual information that is specific to the employee for whom you are making the request.

List of Steps

The Activity Guide framework includes a left panel that lists the steps in the PAR process.

Field or Control	***Description***
<Step or Substep Name>	On the left panel with the list of steps, individual steps are numbered and labeled. Some steps will have substeps, which are not numbered. Steps with substeps are indicated by an expand/collapse icon after the step name. The step is automatically expanded when the user reaches it. The user can also click the parent step at any time to expand or collapse it. The page will highlight the current step or substep. If a step consists of substep, you must visit each substep sequentially before saving on the last substep of the step. Upon a save, if any required information is missing, a message appears, and the user must provide the missing information before saving the data and continuing.
<Step Status>	Each step and substep has a status. • *Not Started*: these are unvisited steps. • *Visited.*: When the user first reaches a step, the status changes to ‘Visited’. Users can return to steps and substeps by clicking the step. **Note:** All the steps will be in 'Visited' status for those transactions in status 'In Progress - Requested' and above.

<Transaction Name> Pages

Within the Activity Guide framework, the right panel displays the page for the current step in the PAR process.

Field or Control	***Description***
<Title Text>	Displays a page title that includes the step number and step name—for example, *Step 2 of 3: Validate Data* For substeps, the page title includes both the step and substep name, separated by a hyphen. For example, *Step 1 of 3: Request Data - Data Control* indicates that the step title is *Request Data* and the substep title is *Data Control.*

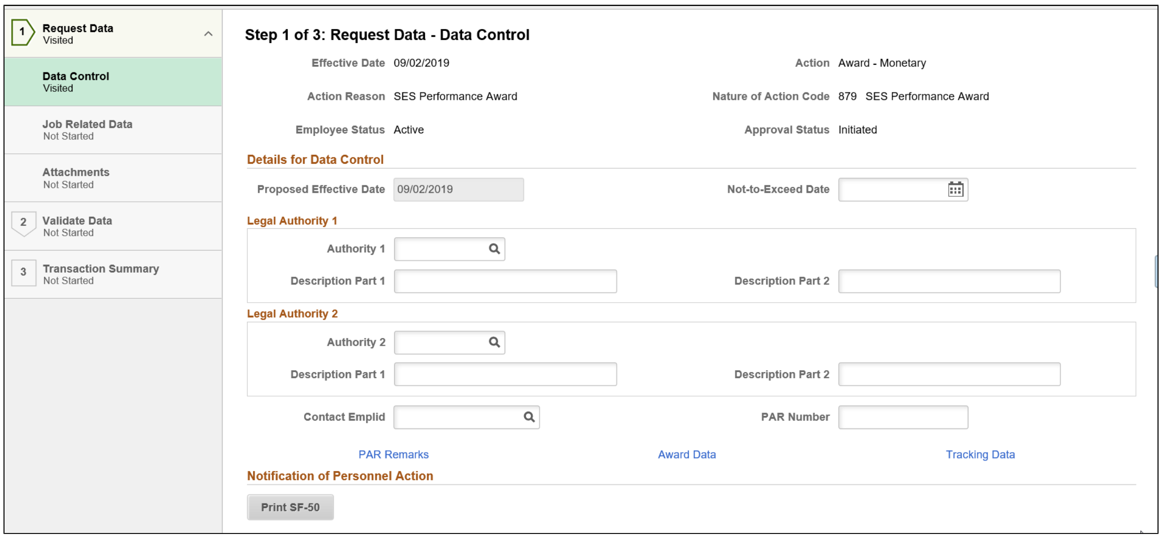
Request Data - Data Control Page

Use the Request Data - Data Control page (GVT_JOB0_FL) to enter information for the PAR process, such as the approving authorities, PAR remarks, and tracking information.

Navigation:

- Click the **Continue** button from the Request Details Page.
- Click the **View/Continue** button from the Personnel Actions USF Page.
- Click the **Data Control** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.
- Click the **Previous** button from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Request Data - Data Control page.



Details for Data Control

Field or Control	*Description*
Proposed Effective Date	This field is populated with the date that is entered in the **Actual Effective Date** field.
Not to Exceed Date	Enter the ending date of a temporary action (for example, the date a temporary job expires or designate the length of time the temporary employment can last). Based on NOA code this field becomes a mandatory field to be filled in.
Authority (1), Authority (2), Description Part 1 and **Description Part 2**	Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.
Override NFC Indicator	Switch the value to *Yes* to override the value in the **NFC Indicator** field.

Field or Control	***Description***
Contact Emplid (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the personnel action request.
NFC Indicator (National Finance Center processing)	Displays the status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include: • *In Process* – This personnel action has been run through the export program and will be sent to NFC. • *Not Ready to Process* – User intends to exclude this personnel action from export to NFC. • *Other* – Status maintained by system user. • *Ready To Process* – User intends to include this personnel action in the next NFC export. • *SINQ Error* – This personnel action has not successfully passed NFC's PINE Edits and needs correction.
PAR Request Nbr (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
PAR Remarks	Click to access the PAR Remarks Page and view or enter comments specific to this position or employee situation.
Award Data	This link is active only for award and bonus personnel actions. Click this link to access the Award Data Page to view or assign an award to a federal employee and enter award, informational, and payroll details.
Tracking Data	Click this link to access the Job Tracking Information Page to view or enter job-tracking information.

Notification of and Request for Personnel Action

Field or Control	***Description***
Print SF-52 and **Print SF-50**	Select these buttons to print the Notice of Personnel Action USF or Request Personnel Action USF action request. For more information, see the Notice of Personnel Action USF or Request Personnel Action USF - Parameters Page.

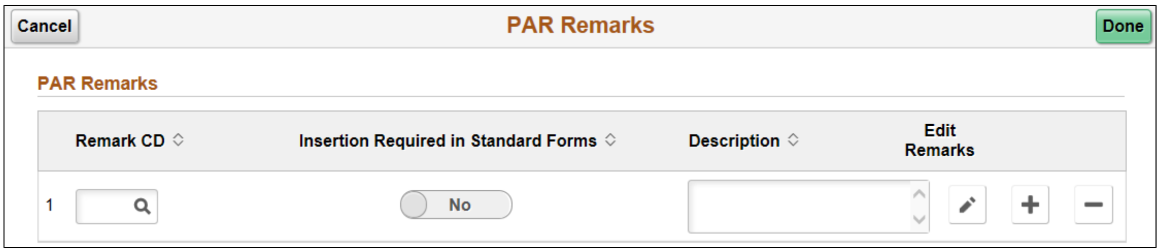
PAR Remarks Page

Use the PAR Remarks page (GVT_PAR_PROCES_SCF) to enter or look up comments specific to this position or employee situation.

Navigation:

Click the **PAR Remarks** link on the Request Data - Data Control Page.

This example illustrates the fields and controls on the PAR Remarks page.



Use this page to enter remarks. Use the Add row button to enter multiple comments or the Delete row button to remove a comment.

Field or Control	***Description***
Remark CD (remark code)	Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.
Insertion Required	If this remark needs employee-specific information, this item displays *Yes*. The default settings for this option are defined with the codes on the “Personnel Action Rqst Rmks Page” (Application Fundamentals).

Award Data Page

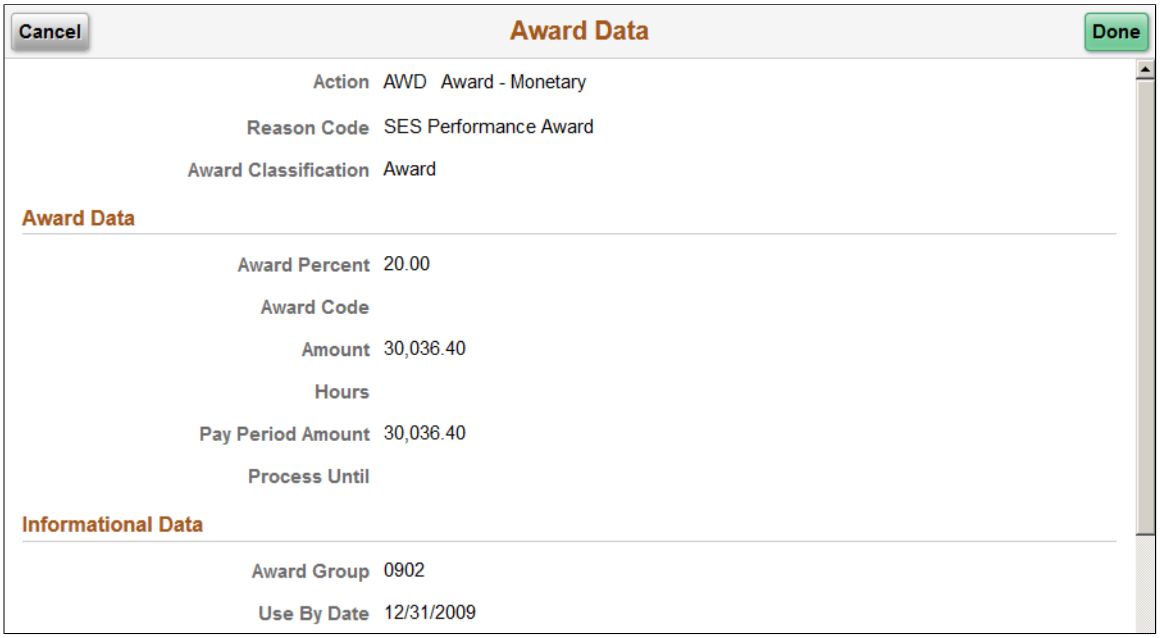
Use the Award Data page (GVT_AWD_DATA_SCF) to view or assign an award to a federal employee and enter award, informational, and payroll details.

Navigation:

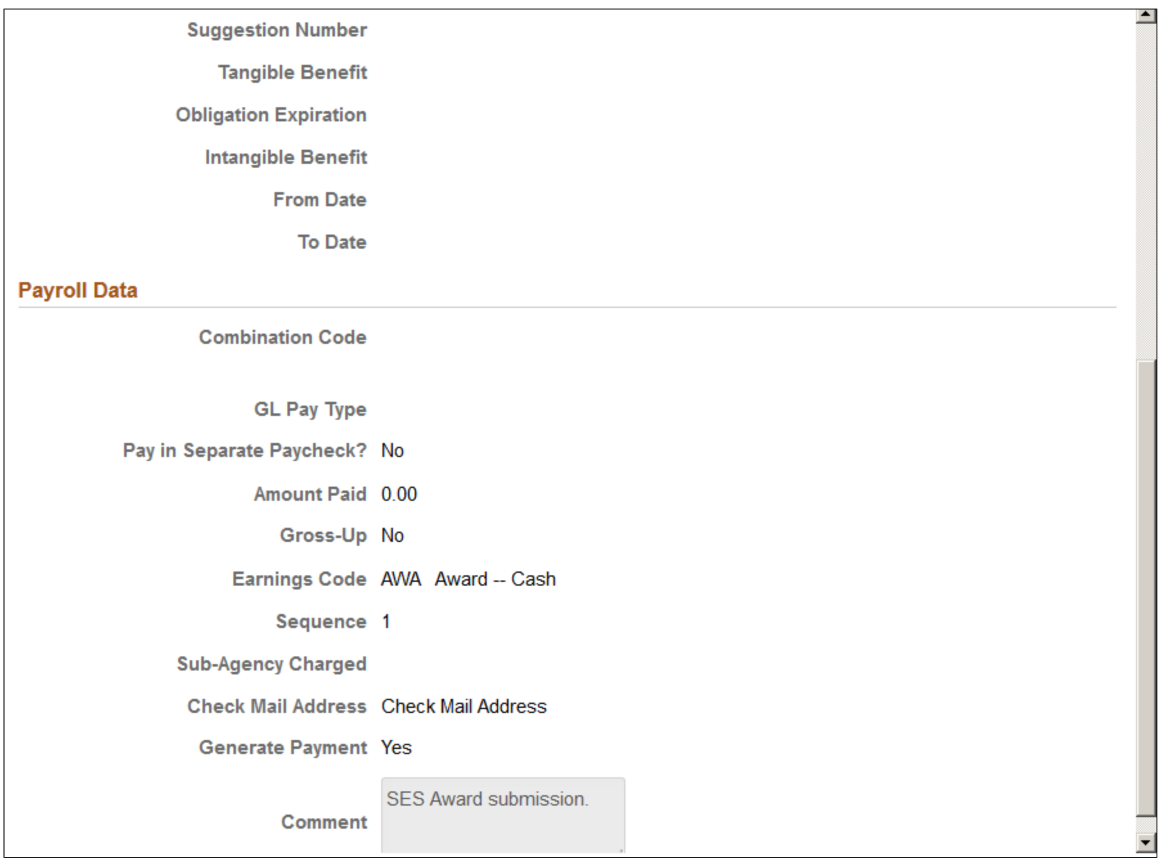
Click the **Award Data** link on the Request Data - Data Control Page.

This link is available only when the **Action** field is *AWD* (award - monetary) or *BON* (bonus), and the **Reason Code** field is populated.

This example illustrates the fields and controls on the Award Data page (1 of 2).



This example illustrates the fields and controls on the Award Data page (2 of 2).



Use this page to enter remarks. Click the **Cancel** button to return to the Request Data - Data Control Page without saving your data, or click **Done** to save your award data.

Award Data

Field or Control	***Description***
Award Percent	Enter the percent of pay to be paid as an award.
Award Code	Displays the NFC award code, which defaults from the Award Action definition.
Amount	Enter the award amount granted.
Hours	Enter the hours granted as an award.
Pay Period Amount and **Process Until**	Enter the award amount paid each pay period until a specified date.

Informational Data

Payroll for North America uses the award data that is then paid to the employee.

Field or Control	***Description***
Award Group	Identify an award group number.
Use By Date	Enter the date by which this award must be used.
Suggestion Number	Enter a suggested monetary amount.
Tangible Benefit	Enter the tangible benefit amount.
Obligation Expiration	Enter the expiration date of any obligations, such as amounts of orders placed, contracts and subgrants awarded, goods and services received, and similar transactions.
Intangible Benefit	Enter the amount value of an intangible benefit, if applicable.
From Date	Enter the award begin date (NFC only).
To Date	Enter the award end date (NFC only).

Payroll Data

Field or Control	***Description***
Combination Code, GL Pay Type, Amount Paid, Gross Up, and **Earnings Code**	The information in these fields defaults from the Award Action definition.
Sub Agency Charged	Identify the accounting station charged for cash award if not the employee's accounting station (NFC Only).
Check Mail Address Indicator	Specify where NFC should mail an award check. For example, the award may not get mailed to the employee's address, but instead to an office for a ceremony (NFC Only).
Generate Payment	Select *Yes* to generate the award payment (NFC Only).

Related Links

Performing Common Personnel Actions

Job Tracking Information Page

Use the Job Tracking Information page (GVT_EE_CNTRL_SCF) to view or enter job-tracking information.

Navigation:

Click the **Tracking Data** link on the Request Data - Data Control Page.

This example illustrates the fields and controls on the Job Tracking Information page.

Tracking Information

Field or Control	***Description***
Action Taken	Displays the date that the action request was entered.
Action Date Override	Switch to *Yes* make the **Action Taken** field available for entry so that you can change the action date.
Override Operator Emplid (override operator employee ID)	(Optional) Switch to *Yes* to indicate that a person other than the one whose user ID was used to log in is entering data. For example, when an administrative assistant is entering data on behalf of a supervisor.
Emplid of Tracking Row (employee ID of tracking row) and **Name**	When the **Override Operator Emplid** field is set to *Yes,* this field becomes available for entry. Enter the ID of the person actually performing the data entry and that employee's name will appear in the *Name* field.

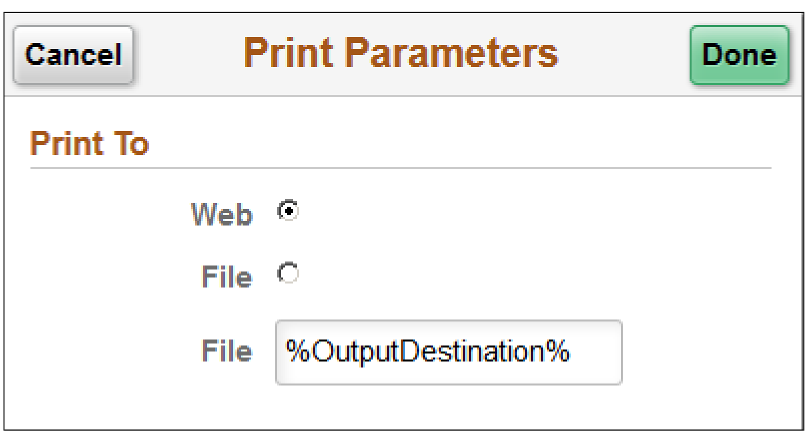
Print Parameters Page

Use the Print Parameters page (GVT_PAR_PRT_PA_SCF) to print the official Notification of Personnel Action form (SF-50) or Request for Personnel Action form (SF-52) used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.

Navigation:

Click the **Print SF-50** or **Print SF-52** button from the Request Data - Data Control Page.

This example illustrates the fields and controls on the Print Parameters page.



Select to print the report to the web or to a file. When you select **File**, the page displays the **File** field where you indicate the location to save the file.

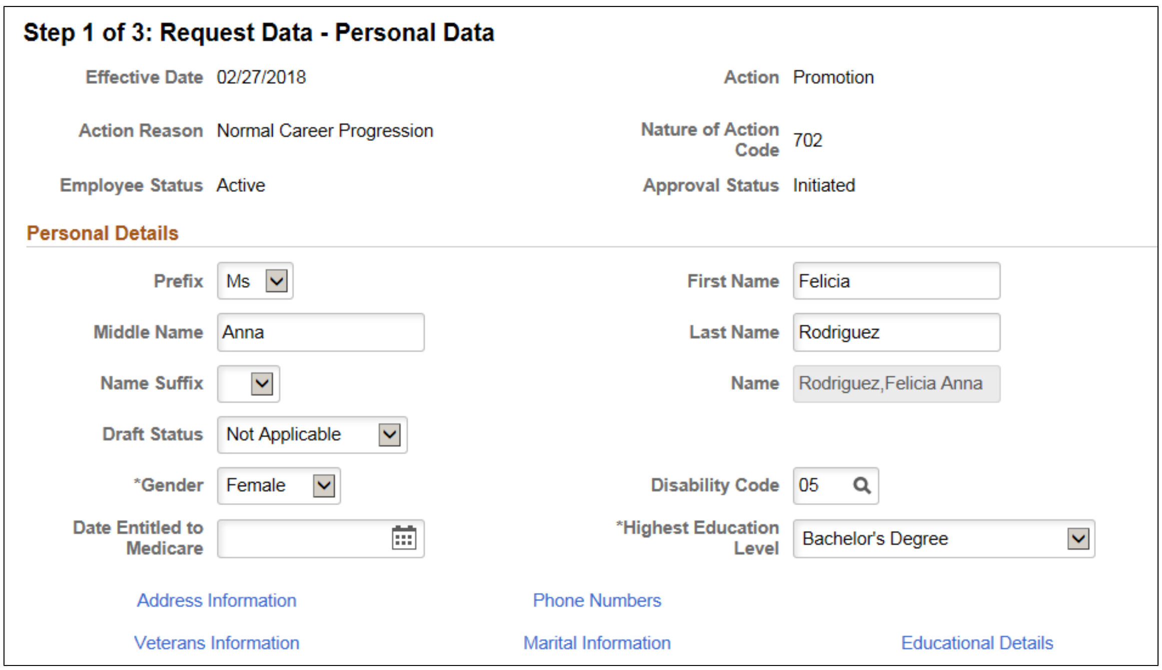
Request Data - Personal Data Page

Use the Request Data - Personal Data page (GVT_PERS_DATA1_FL) to enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran status, marital status, race of origin, and handicap status.

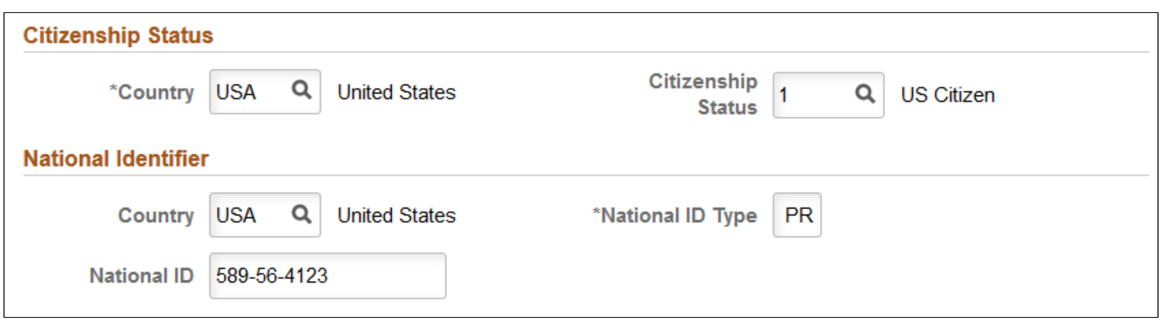
Navigation:

- Click the **Personal Data** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.
- Click the **Next** button on the Request Data - Data Control Page or the **Previous** button from the Request Data - Job Related Data Page.

This example illustrates the fields and controls on the Request Data - Personal Data page (2 of 2).



This example illustrates the fields and controls on the Create/View Personnel Actions - Personal Data page (2 of 2).



Personal Details

Use this section to enter a person’s name information.

Field or Control	Description
Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Although this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, it is recommended that you enter the information later.
Draft Status	(Optional) Select a draft status. Options include *Not Applicable, Not Yet Registered,* and *Registered.*
Disability Code	Select the disability code from the list, or if none, select the value *05 - No Handicap.*
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Highest Education Level	(Optional) Select the employee's highest level of education
Gender	Indicate the employee's gender.
Address Information	Click to access the Address Information Page and enter home and mailing address information.
Phone Numbers	Click to access the Personal Phone Numbers Page and enter employee phone, fax, mobile, and other numbers.
Additional Birth Information	Click to access the Additional Birth Information Page and enter the employee's birth information.
Veterans Information	Click to access the Veterans Information Pageand enter veterans information.
Marital Information	Click to access the Marital Status Page and enter marital information.
Educational Details	Click to access the Educational Details Page and enter or view the schools attended and degrees completed by this employee.

Citizenship Status

Field or Control	***Description***
Country	Select the country for the citizenship status you want to define for this person. The **Citizenship Status** field options are tied to the country you select.
Citizenship Status	Select the appropriate citizenship status for this country.

National Identifier

Field or Control	***Description***
Country	Many countries have unique national ID formats. Select the country with the ID format you want to use for this person.
National ID Type	Enter the corresponding ID type of the employee's country you selected in this section.
National ID	Enter the employee's national identification number.

Related Links

Requesting Terminations Due to Death
“Understanding U.S. Regulatory Requirements” (PeopleSoft Human Resources Meet Regulatory Requirements)
“PeopleSoft Manage Base Benefits Overview” (PeopleSoft Human Resources Manage Base Benefits)

Address Information Page

Use the Address Information page (GVT_ADDRINF_SCF) to enter home and mailing address information.

Navigation:

Click the **Address Information** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Address Information page.

Field or Control	***Description***
Home Address	The home address information appears in the **Address** field on this page.
Edit	Click the Edit button to open the Push Notification modal page where you will complete the address fields.
Geo Location	Geographic location code appears in the **Geo Location** field on this page. **Note:** If you want to newly link a geographic location to this person, enter the code in the modal page. Geographic location rules are set up on the Geographic Location Table
View Location	Click this link to access the Location Description Page and view or enter the geographic location codes for state, country, or city. **Note:** This link is visible only if you have selected the Geo Location.
Mailing Address	The mailing address information appears in the **Address** field on this page.
Edit	Click the Edit button to open the Push Notification modal page where you will complete the address fields. You can enter the designated agent code for the mailing address in the modal page.
Cancel	Click **Cancel** to return to the Request Data - Personal Data Page without saving your entries.

Field or Control	Description
Done	Click to save your address information.

Related Links

"Administering Country Codes" (Application Fundamentals)

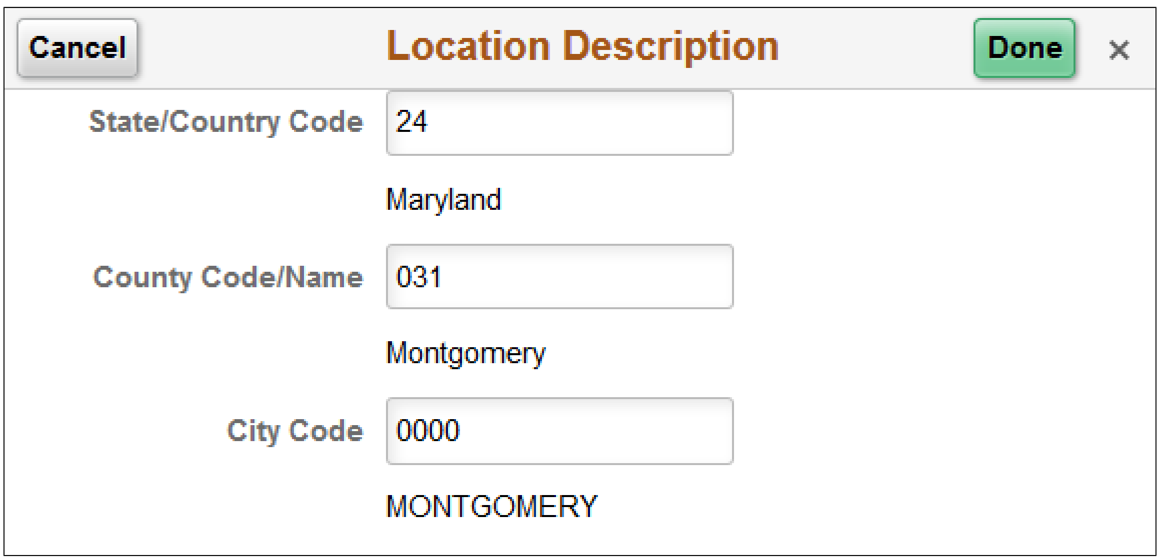
Location Description Page

Use the Location Description page (GVT_HOME_GEOLOCTN) to view the geographic location codes for the state, county or city.

Navigation:

Click the **View Location** link from the Address Information Page.

This example illustrates the fields and controls on the **Personal Phone Numbers** page.



When you enter a geo location code on the Address Information Page, the system will auto populate these fields.

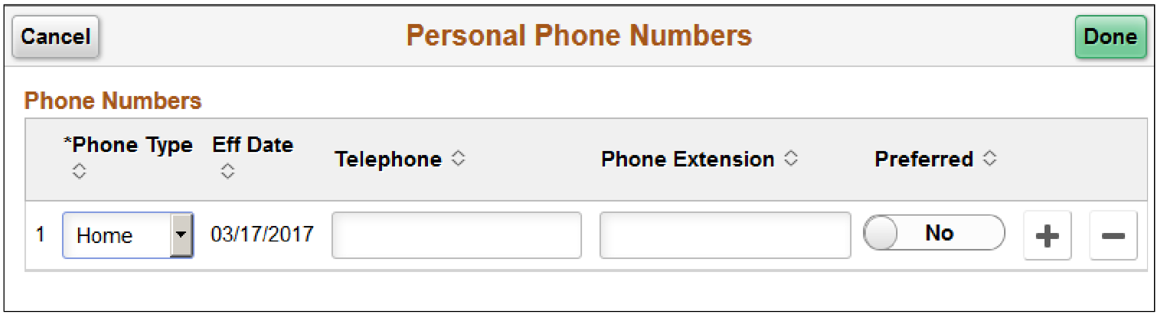
Personal Phone Numbers Page

Use the Personal Phone Numbers page (GVT_PERS_PH_SCF) to enter employee phone, fax, cellular, and other numbers.

Navigation:

Click the **Phone Numbers** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Personal Phone Numbers page.



Select a contact type such as a phone number or email and enter the details for that number. You can select one number as a preferred number. Click the **Add** button to enter additional contact information.

Additional Birth Information Page

Use the Additional Birth Information page (GVT_BRTHINF_SCF) to enter the employee's birth information.

Navigation:

Click the **Additional Birth Information** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Additional Birth Information page.

Field or Control	*Description*
Birth Location	Enter the name of the city.
Birth State	Select the birth state.
Birth Country	Select the birth country.

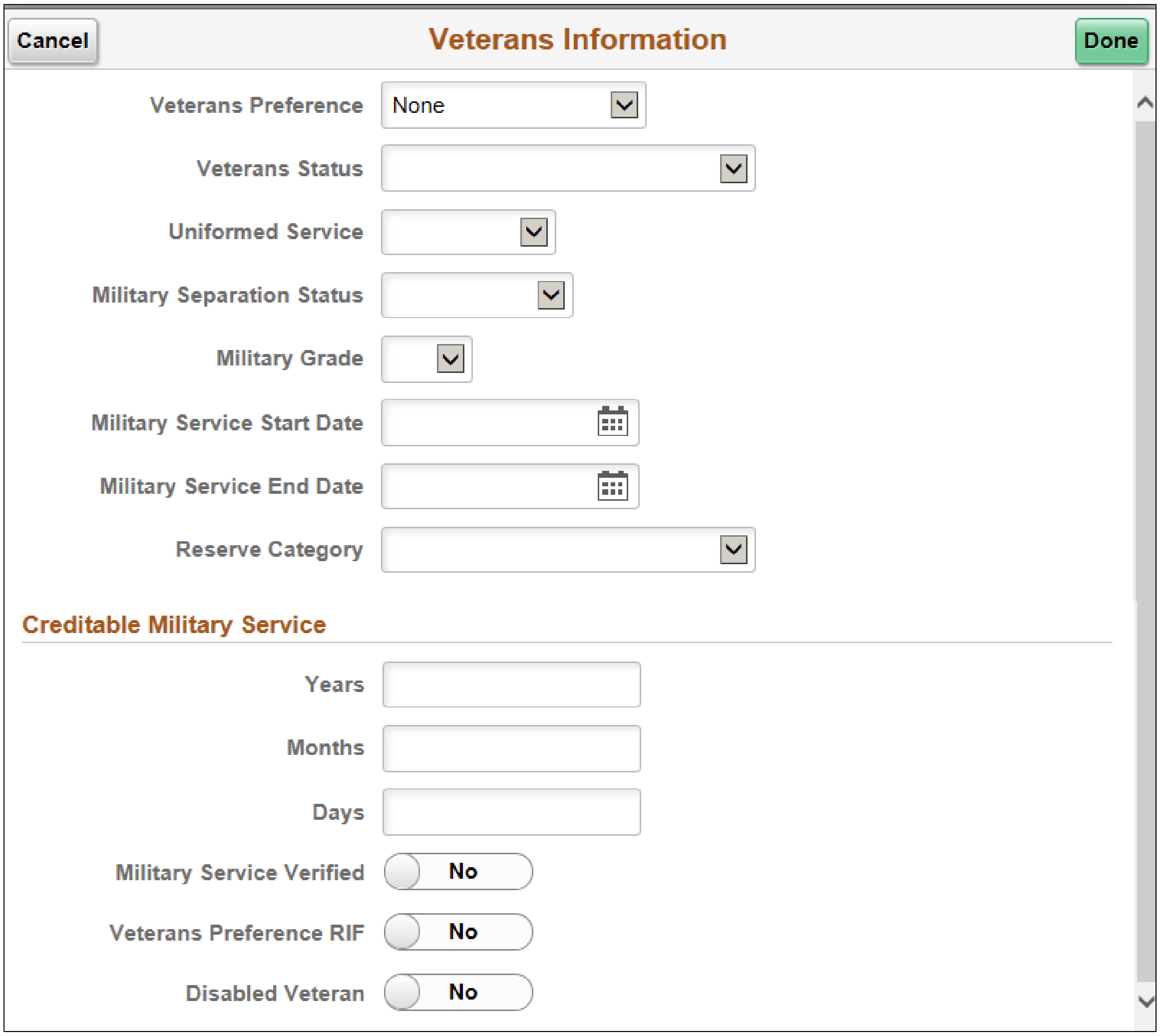
Veterans Information Page

Use the Veterans Information page (GVT_VETINF_SCF) to enter veterans information.

Navigation:

Click the **Veterans Information** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Veterans Information page (1 of 2).



Field or Control	***Description***
Veterans Preference	Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide.*
Veterans Status	Select the veteran's status.
Uniformed Service	Select the type of uniformed service in which this veteran served.
Military Separation Status	Select the veteran's military separation status.
Military Grade	Select the veteran's military grade.

Field or Control	Description
Military Service Start Date and **End Date**	Enter the veteran's military service start and end dates.
Reserve Category	Select the employee's reserve category, or select *Not Applicable.*

Creditable Military Service

Field or Control	Description
Years, Months, and Days	Enter the creditable military service in years, months, and days.
Military Service Verified	Switch to *Yes* if you have received verification of service.
Veterans Preference RIF (veterans preference reduction in force)	Switch to *Yes* to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.
Disabled Veteran	Switch to *Yes* if the veteran is disabled.

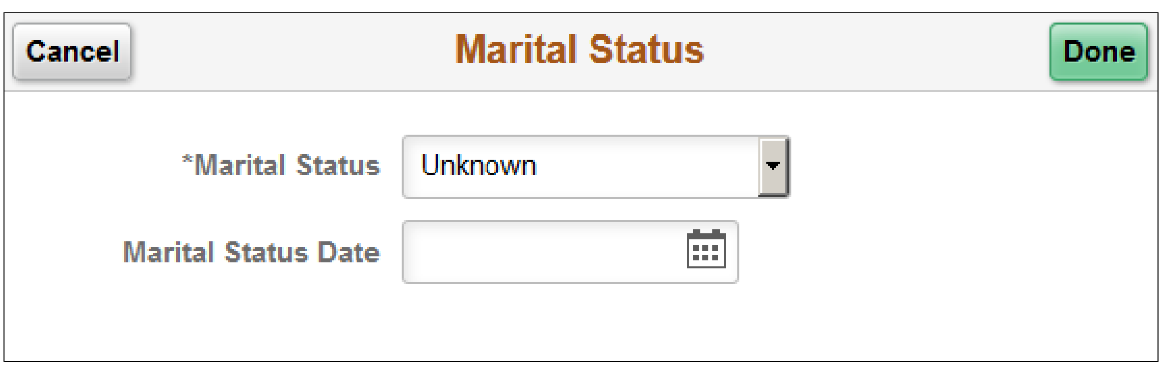
Marital Status Page

Use the Marital Status page (GVT_MARITAL_SCF) to enter marital information.

Navigation:

Click the **Marital Information** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Marital Status page.



Field or Control	***Description***
Marital Status	Select the person's marital status.
Marital Status Date	Enter the date on which this status took effect.

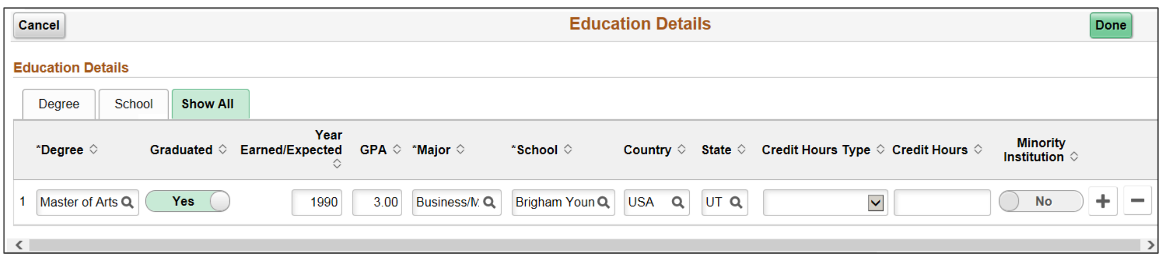
Educational Details Page

Use the Educational Details page (GVT_EDUCINF_SCF) to view or enter schools attended and degrees completed by this employee.

Navigation:

Click the **Educational Details** link from the Request Data - Personal Data Page.

This example illustrates the fields and controls on the Educational Details page.



Field or Control	***Description***
Degree	Select the degree earned or expected for the employee. Degrees are defined in the content catalog that is part of the Manage Profiles business process.
Graduated	Swipe to *Yes* if the employee has graduated.
Year Earned\Expected	Enter the year the degree was earned or is expected to be earned if the employee has not graduated.
GPA (grade point average)	Enter the employee's grade point average from the school.
Major	Select the major code for the degree earned or being earned. Define major codes on the Majors page.
School	Select the code designating the school the employee graduated from or currently attends. Based on the selected code, name of the school is displayed. Define school codes on the Schools page.
Country	Select the country where the school is located.

Field or Control	***Description***
State	Enter the state where the school is located.
Credit Hours Type	Select the hours type. Values are: *Continuing Education*, *Other Pay*, *Quarter Hours*, and *Semester Hours*.
Credit Hours	Enter the credit hours earned either upon completion or to this point if not complete.
Minority Institution	Indicate if the employee attended or attends a designated minority institution. If you entered a school code, the value will default from the employee's profile.

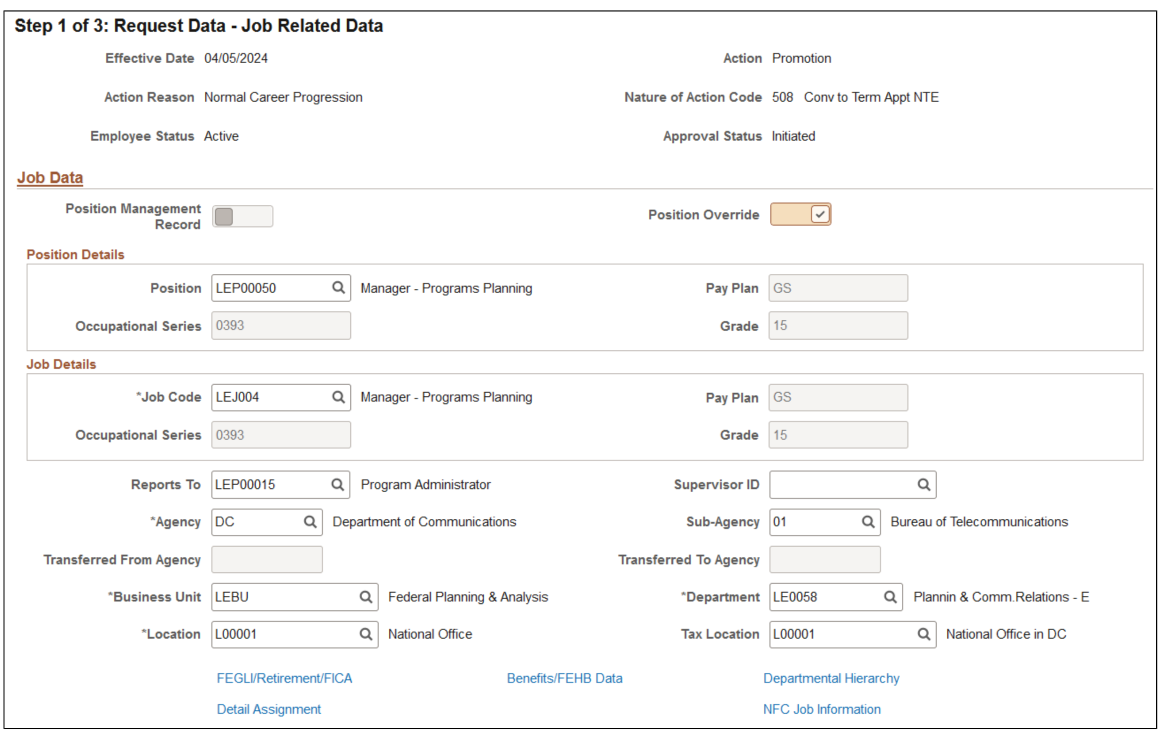
Request Data - Job Related Data Page

Use the Request Data - Job Related Data page (GVT_JOB1_FL) to enter job information, including the employee's position, agency, and department.

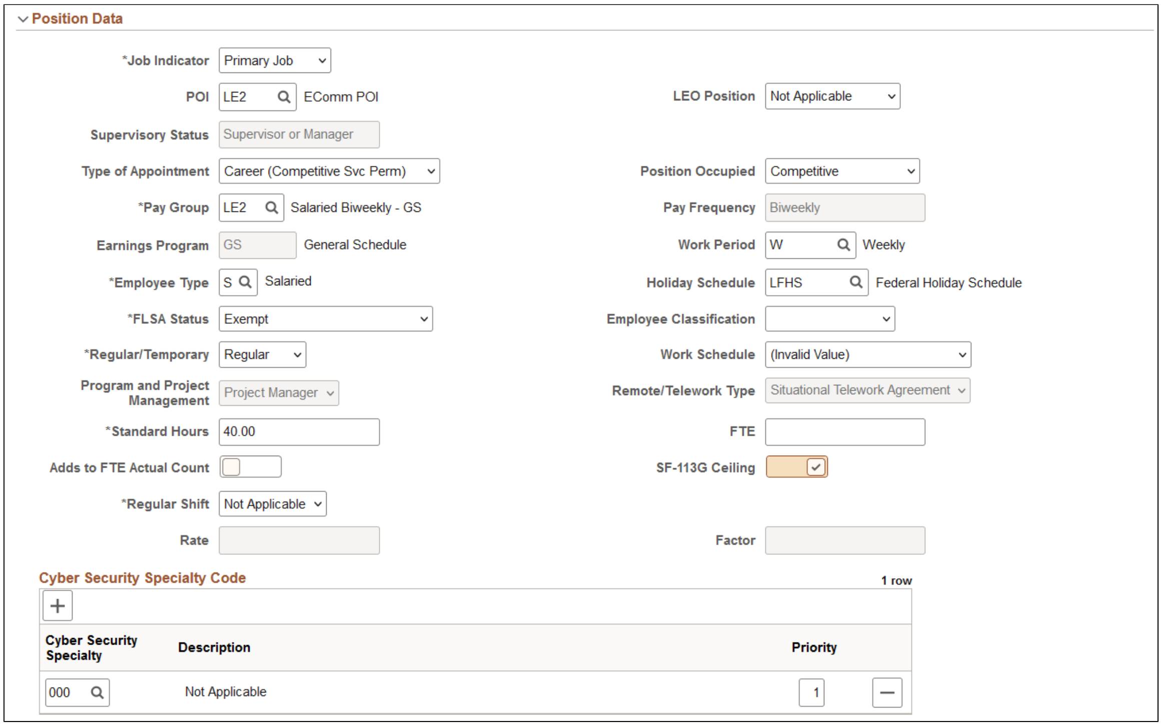
Navigation:

- Click the **Job Related Data** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.
- Click the **Next** button on the Request Data - Personal Data Page or the **Previous** button from the Request Data - Employment Data Page.

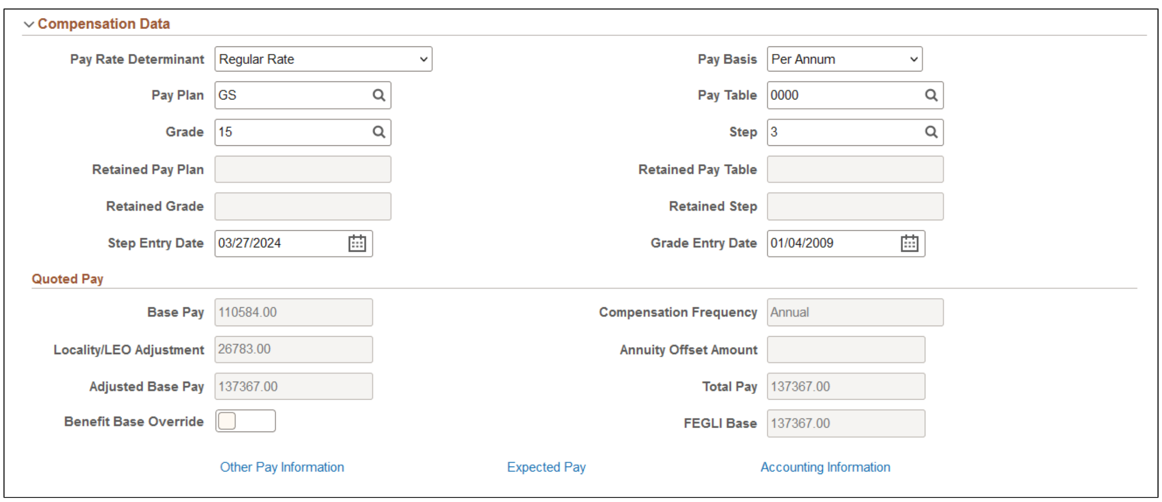
This example illustrates the fields and controls on the Request Data - Job Related Data page (1 of 3).



This example illustrates the fields and controls on the Request Data - Job Related Data page (2 of 3).



This example illustrates the fields and controls on the Request Data - Job Related Data page (3 of 3).



Job Data

When using Position Management, many values on this page are provided by default from the position. If necessary, you can override most of these defaults.

Field or Control	*Description*
Position Management Record	If your organization uses the Manage Positions business process and the administrator has made updates to this position, the option displays *Yes*. For an initial employment instance (for a new hire), *No* is selected, as the new hire would not have information to update.
Position Override	Switch the **Position Override** option to *Yes* to make changes to position data that are otherwise locked in by the position data record. This will enable you to change any of the position-related fields, such as the **Job Code, Department, Agency,** and **Sub-agency.** PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position. **Note:** After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.

Field or Control	***Description***
Position	Select a position. When you move out of this field, the system provides default data for position-related fields. This data comes from the Add/Update Position Info component if the Manage Positions business process is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data. In addition, the system inserts a default value in the **Reports To** and **Supervisor's ID** fields on this page if these are entered when setting up the position. If you've associated agencies with departments on the Department table, the system enters the agency code on this page and the field is unavailable for entry. It also enters default values in the Position Data section for the pay periods, employee type, holiday schedule (which you define in the Pay Group table), and pay group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). The system enters the standard hours that correspond to the job code. If you've associated them with the job code, the system also enters the pay plan, pay table, and grade, and compensation frequency within the Compensation Data section. In addition, within the Compensation Data section, the system enters the grade and step entry date, which is the date the employee was first assigned to the grade and step.
Pay Plan and **Grade**	Displays the pay plan and grade associated with the position.
Occupational Series	Displays the occupational series that is associated with this position.
Job Code	If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.
Agency, Sub-Agency, Business Unit, Department, and **Location**	Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values when the **Position** ID is selected.

Field or Control	Description
Transferred From Agency	If the reason code entered on the Request Details Page was *Transfer,* select the agency from which the employee is transferring. **Note:** Not valid for a concurrent assignment.
Transferred To Agency	This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Request Details Page. **Note:** Not valid for a concurrent assignment.
Tax Location	Derived from the department-tax location relationship established on the Department table. You can also select the tax location for this person.

Position Data

Use this section to enter position information like employee type, classification, appointment type, work schedule, and pay group.

Field or Control	Description
POI (personnel office identifier)	Set by default from the position data or the job code.
LEO Position (law enforcement officer position)	If this is a law enforcement officer position, a value appears from the job code.
Type of Appointment	Enter the employee's type of appointment, such as *Career* (Competitive Service Permanent), *Limited, Executive,* or *Schedule A - C.*
Position Occupied	This field identifies the type of appointment which can occupy the position. Values are *Competitive, Excepted Senior Executive Service (SES) Career Reserved* and *SES General.*
Pay Group	A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.
Pay Frequency	Set by default from the pay group.

Field or Control	***Description***
Work Period	Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).
Employee Type	The default value and valid options are defined by the pay group. If an employee type doesn't exist for this pay group, establish one on the Pay Group table.
Holiday Schedule	If you linked an established holiday schedule on the Pay Group table, it appears here.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the job code.
Employee Classification	Identify another method of grouping employees.
Regular/Temporary	Indicate whether the employee is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Human Resources uses this value when determining eligibility requirements.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Work Schedule	Set by default from the position.
Program and Project Management	**Note:** This field is available for job data rows with the effective date of August 2, 2023 or later. Displays the managerial position for this person, which can be used for reporting to the OPF. The value comes first from the position, however, if the position does not have this value defined, it is provided by default from the job code. **Note:** This value is for display purposes only to aid PAR processors. It is not stored on PAR tables.

Field or Control	***Description***
Remote/Telework Type	**Note:** This field is available for job data rows with the effective date of September 1, 2023 or later. Displays the remote worker/teleworker agreement type for this person, which can be used for reporting to the OPF. The value comes first from the position, however, if the position does not have this value defined, it is provided by default from the job code. **Note:** This value is for display purposes only to aid PAR processors. It is not stored on PAR tables.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	Identifies the percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than or equal to 1.0.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Switch to *Yes* to include this employee's job when processing FTE edits for budgeting purposes.
SF-113G Ceiling	Switch to *Yes* if this position is reportable for the SF-113G ceiling.
Regular Shift, and **Rate/Factor**	If the employee is working shifts, select the appropriate shift, and specify the rate or factor for that shift type.
Cyber Security Code	Select the cyber security code for the position. You can also set priority if you are adding multiple cyber security codes. **Note:** You can associate up to 3 cyber security code with a position, if rows are added for effective date higher than December 1st, 2016.

Note: Cyber Security Codes for an employee is stored in a new child record GVT_EE_CYB_CD. Data in GVT_JOB.GVT_CYBER_SEC_CD is marked obsolete and should not be used. **Add** button and **Priority** fields are visible only for row with Effective Date on or after December 1st, 2016.

Compensation Data

Note: Multiple components of pay, derivation of rates, and related features are not currently supported by PeopleSoft Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job Data page. Override these values if necessary.

Field or Control	*Description*
Pay Rate Determinant	Select a pay rate determinant.
Pay Plan, Pay Table, and **Grade**	Select the pay plan, table, and grade.
Step	Assign the correct step for the employee. **Note:** For certain Pay Rate Determinants this is not an option and the field does not accept data.
Retained Pay Plan, Retained Pay Table, Retained Pay Grade, and **Retained Step**	There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.
Step Entry Date and **Grade Entry Date**	Enter the date the employee was first assigned to the grade and step. If the **Multi-Step/Grade** check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

Field or Control	***Description***
Base Pay, Locality/LEO Adjustment, and **Total Pay**	If you are using partial or full position management, a value is set by default here based on your prior assignment in the **Step** field. A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected *Yes* for the **Position Override** option within the Job Data section of this page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the **Loc/LEO Adjustment** (if appropriate) and **Total Pay** fields after you have provided the compensation data.
Compensation Frequency	Set by default from the job code; override if necessary.
Annuity Offset Amount	This field is available only after the annuitant job record has been saved with one of the following values in the Annuitant Indicator field: *1, 4, 5, A, C,* or *E.* If the employee is an annuitant, enter a CSRS, FERS, or FERS RAE annuity offset amount. **Note:** The Annuity Offset Amount that you enter cannot be greater than the Base Pay amount.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.
Benefit Base Override and **FEGLI Base**	The system calculates the FEGLI base rate. Select the **Benefit Base Override** check box to override this default and then enter a new amount.
Other Pay Information	Click to access the Other Pay Information Page and enter compensation that employees receive that's in addition to base pay.

Field or Control	*Description*
Expected Pay	Click to access the Expected Pay Page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page.
Accounting Information	Click to access the Accounting Information Page and view a summary of the employee's job earnings distribution.

If you selected the **Multi-currency** check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Understanding Default Values for Compensation Data

After you enter job and position data, pay information is populated by default within the Compensation Data section. If you associated pay plans with job codes, the **Pay Plan** field is populated by default from the data in the Job Code table. The **Grade** field is populated by default from the job code. After the values in the **Pay Plan** and **Grade** fields appear, the system also displays the **Grade Entry Date** field, which is the date the employee first joined the grade. When a value is entered in the **Step** field, the value in the **Step Entry Date** field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

Related Links

Understanding PARs

Defining Personnel Actions and Reasons

"Understanding Payroll Schedules" (PeopleSoft Payroll Interface)

"Understanding Positions" (PeopleSoft Human Resources Manage Positions)

"Understanding Frequency IDs" (Application Fundamentals)

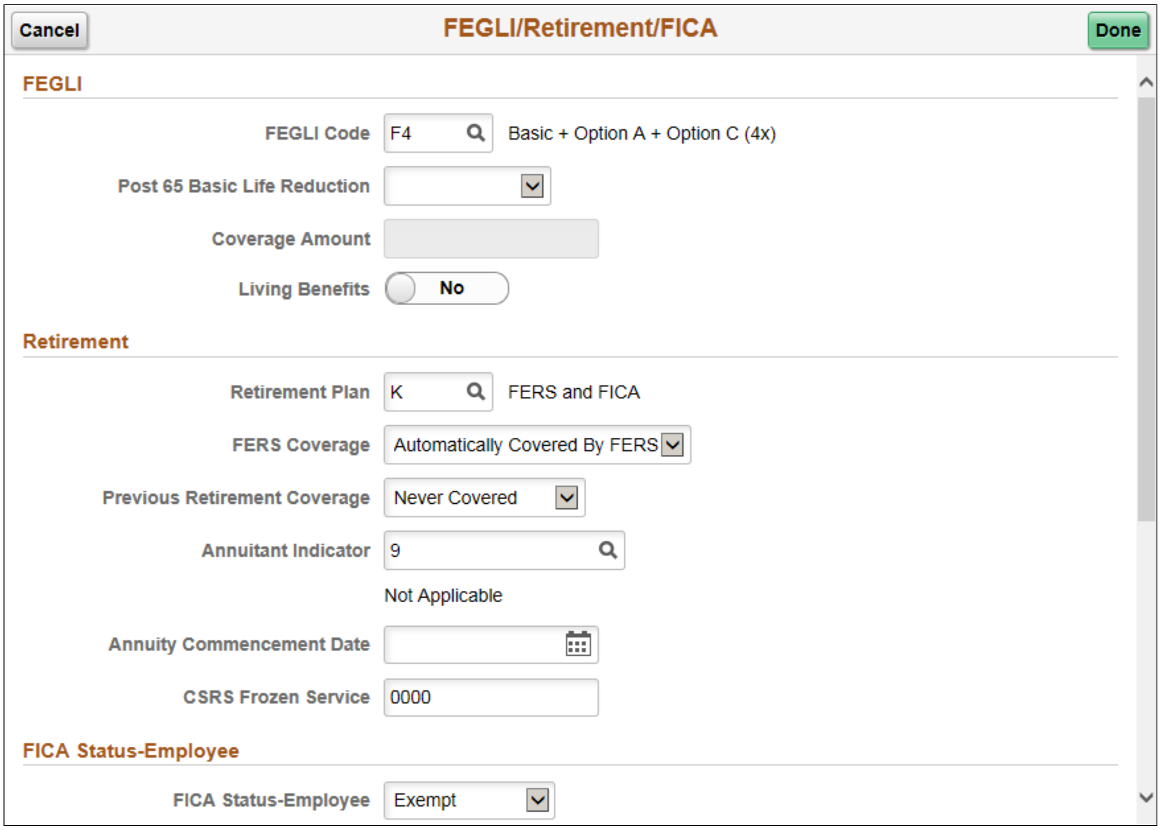
FEGLI/Retirement/FICA Page

Use the FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act) page (GVT_BENDATA1_SCF) to enter life insurance and retirement data.

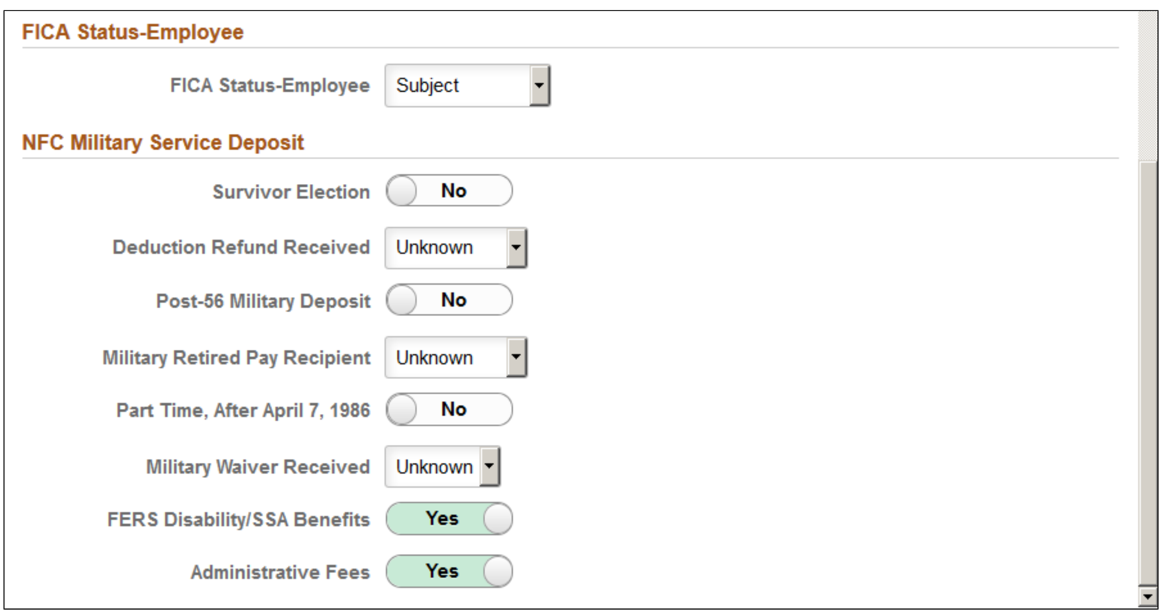
Navigation:

Click the **FEGLI/Retirement/FICA** link on the Request Data - Job Related Data Page, Job Data section.

This example illustrates the fields and controls on the FEGLI/Retirement/FICA page (1 of 2).



This example illustrates the fields and controls on the FEGLI/Retirement/FICA page (2 of 2).



FEGLI

Field or Control	*Description*
FEGLI Code (federal employees group life insurance code)	Enter the FEGLI code.
Post 65 Basic Life Reduction	Select the employee's post-65 basic life reduction coverage.
Coverage Amount and **Living Benefits**	Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Field or Control	*Description*
Retirement Plan	Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), the PeopleSoft application supplies the following codes that you may use for documentation purposes only:

Retirement Plan Code	*Explanation*
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).

Retirement Plan Code	***Explanation***
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

Field or Control	***Description***
FERS Coverage (Federal Employees Retirement System coverage)	Select the employee's FERS coverage.
Previous Retirement Coverage	Select the employee's previous retirement coverage.
Annuitant Indicator	Select the employee's annuitant indicator.
Annuity Commencement Date	If a new employee is a reemployed annuitant, enter the annuity commencement date.
CSRS Frozen Service (Civil Service Retirement System frozen service)	Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee. In the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS. You need to enter the time span as a four-number code. The first and second positions indicate the number of years, while the third and fourth positions indicate the number of months. For example, a time span of 5 years and 3 months would be entered in CSRS Frozen Service as 0503

FICA Status-Employee

Field or Control	***Description***
FICA Status-Employee	Indicate whether the employee is employer FICA exempt, exempt, subject, or subject to Medicare only.

NFC Military Service Deposit

Field or Control	***Description***
Survivor Election	Switch to *Yes* if this person has elected a survivor option.
Deduction Refund Received	Indicate if the employee is receiving retirement payments based on military service. Select from *Unknown*, *No or Repaid,* or *Yes.*
Post-56 Military Deposit	Switch to *Yes* to indicate the employee paid the post-1956 military deposit.
Military Retired Pay Recipient	Indicate if the employee previously received a retirement refund. Options include *Unknown*, *No or Repaid,* or *Yes.*
Part Time, After April 7, 1986	Switch to *Yes* to indicate if the employee has any part-time service after April 7, 1986.
Military Waiver Received	Indicate whether a military waiver was received declining military pay. Options include *Unknown*, *No,* or *Yes.*
FERS Disability/SSA Benefits	Switch to *Yes* if this is a Federal Employees Retirement System employee applying for disability retirement and social security benefits.
Administrative Fees	Switch to *Yes* to indicate if the agency has to pay OPM an administrative fee.

Related Links

Requesting Terminations Due to Death
"PeopleSoft Manage Base Benefits Overview" (PeopleSoft Human Resources Manage Base Benefits)

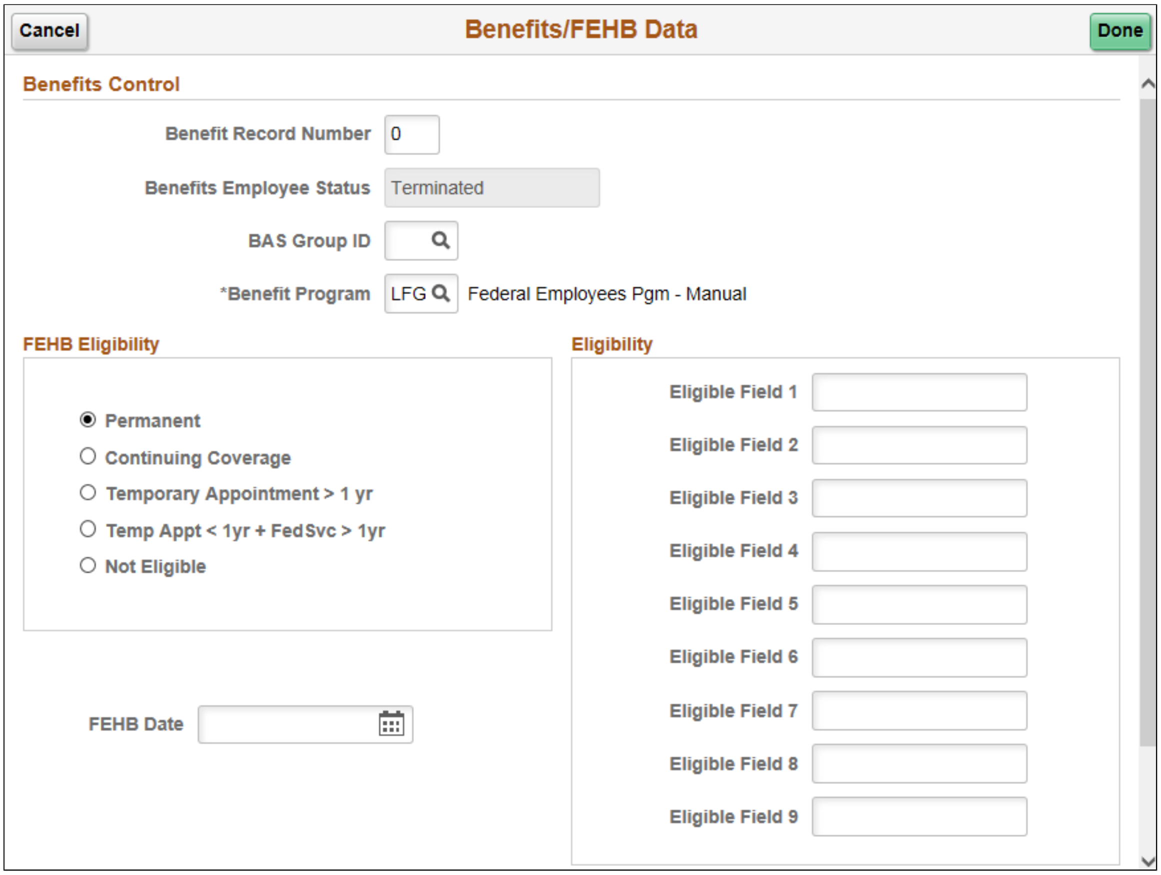
Benefits/FEHB Data Page

Use the Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data) page (GVT_BENDATA_SCF) to specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration

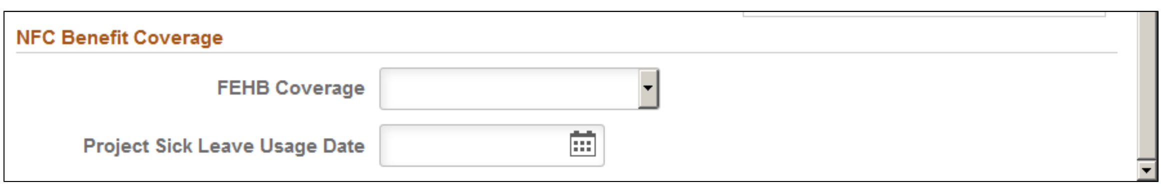
Navigation:

Click the **Benefits/FEHB Data** link on the Request Data - Job Related Data Page, Job Data section.

This example illustrates the fields and controls on the Benefits/FEHB Data page (1 of 2).



This example illustrates the fields and controls on the Benefits/FEHB Data page (2 of 2).



Benefits Control

Field or Control	***Description***
Benefit Record Number	Enter a benefit record number that groups several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.

Field or Control	***Description***
BAS Group ID (benefits administration system group ID)	(Optional) Enter a BAS group ID.
Benefit Program	Enter a benefit program. This is a required field for all PAR transactions.

FEHB Eligibility

Use the FEHB Eligibility (federal employees health benefits eligibility) group box to select the appropriate option to indicate the FEHB eligibility.

If you select *Not Eligible,* the **FEHB Date** field becomes available for entry. This typically applies to temporary employees.

FEHB Date

Field or Control	***Description***
FEBH Date	Enter the date on which an employee will be eligible for FEHB coverage. Typically, the FEHB date is one year from the employee's hire date.

Eligibility

Use this group box to enter values in the **Elig Fld 1–9** (eligibility field 1–9) fields to further define an employee's benefits eligibility.

Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.

NFC Benefit Coverage

Field or Control	***Description***
FEHB Coverage	Identify the status of FEHB coverage.
Project Sick Leave Usage Date	Enter the date of the project sick leave.

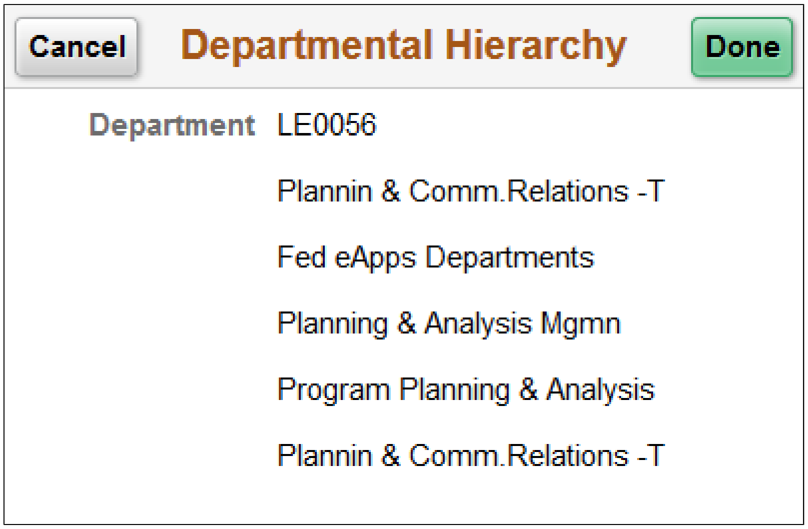
Departmental Hierarchy Page

Use the Departmental Hierarchy page (GVT_DEPTINF_SCF) to view departmental hierarchy for the individual's position.

Navigation:

Click the **Departmental Hierarchy** link on the Request Data - Job Related Data Page, Job Data section.

This example illustrates the fields and controls on the Departmental Hierarchy page.



Detail Assignment Page

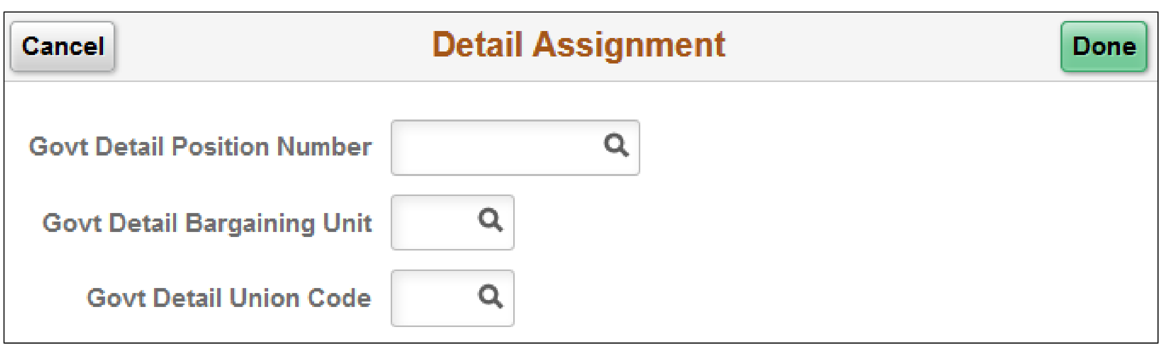
Use the Detail Assignment page (GVT_DETAIL_SCF) to track information for employees on a detail assignment.

You probably won't use this page when first hiring an employee.

Navigation:

Click the **Detail Assignment** link on the Request Data - Job Related Data Page, Job Data section.

This example illustrates the fields and controls on the Detail Assignment page.



Field or Control	***Description***
Govt Detail Position Number (government detail position number)	Select the employee's detail position number.
Govt Detail Bargaining Unit (government detail bargaining unit)	Select the employee's detail bargaining unit.

Field or Control	Description
Govt Detail Union Code (government detail union code)	Select the employee's detail union code.

NFC Job Information Page

Use the NFC Job Information page (GVT_NFC_JOB_SCF) to track required National Finance Center (NFC) information for employees.

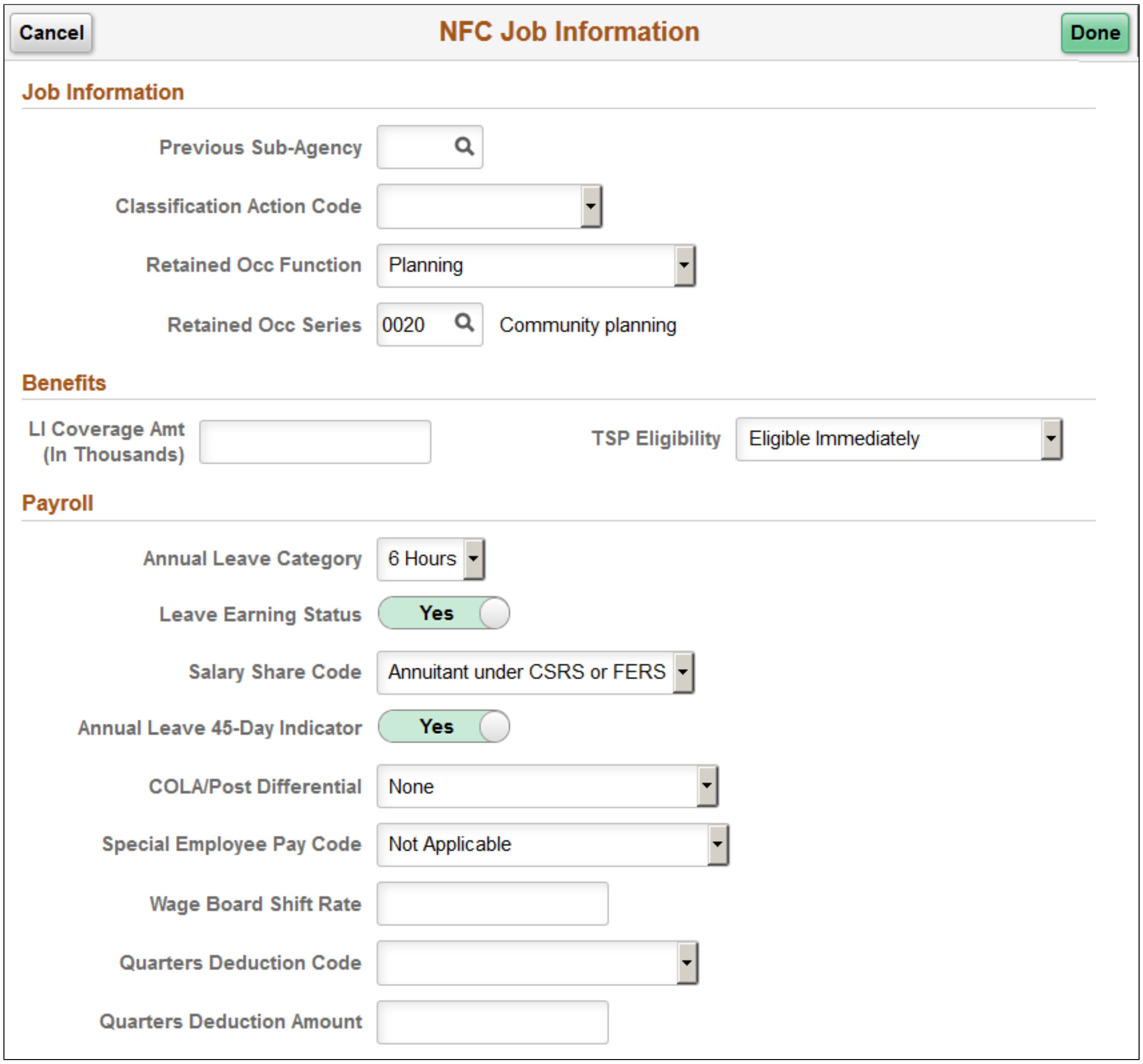
Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.

Navigation:

Click the **NFC Job Information** link on the Request Data - Job Related Data Page, Job Data section.

Note: The **NFC Job Information** link appears on this page only if NFC (National Finance Center) product specific data is turned on at Installation table. The **NFC Job Information** link must appear on the page for you to access the NFC Job Information page described here.

This example illustrates the fields and controls on the NFC Job Information page.



Job Information

Field or Control	*Description*
Previous Sub-Agency	Enter the previous sub-agency when the employee moves to another sub-agency within the same department.
Classification Action Code	Identify the method for processing a classification and personnel action at the same time. Used for reassignments, promotions or change to a lower grade.

Field or Control	***Description***
Retained Occ Function (retained occupational functional classification)	Record the occupational functional classification corresponding to an employee's retained occupational series. This field is required only if the series specified as the retained occupational series is one for which OPM requires an occupational functional classification.
Retained Occ Series (retained occupational series)	Enter the occupational series on which an employee's salary is to be based when that series is not the series of the position the employee held immediately before being placed on grade retention. This would occur, for example, when an employee was returned to an unexpired period of grade retention at the end of a temporary promotion.

Benefits

Field or Control	***Description***
LI Coverage Amt (In Thousands) [life insurance coverage amount (in thousands)]	Enter the amount of basic life insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. Complete this field only if one or more of the following conditions are met: • The employee works at such different rates of pay that the payroll/personnel system is unable to calculate or project the rates of pay on an annual basis. • The employee is paid on a piecework basis. • The employee is paid at different rates of pay during the year.
TSP Eligibility	Specify the type of eligibility for the employee to participate in the Federal Thrift Savings Plan (TSP) for FERS, CSRS, or Offset employees.

Payroll

Field or Control	***Description***
Annual Leave Category	Select the code that identifies the annual leave earning status in the NFC payroll system. If the employee is eligible to earn annual leave, the code represents the appropriate earning category.

Field or Control	***Description***
Leave Earning Status	Switch to *Yes* to identify an employee who is entitled to leave accruals for the first and last pay period of employment in the NFC payroll system.
Salary Share Code	Identify the source, in addition to the agency, that contributes to paying the employee's salary.
Annual Leave 45-Day Indicator	Switch to *Yes* to identify that the employee is stationed at an overseas foreign post of duty and are entitled to carry forward from one leave year to another a maximum annual leave accumulation of 45 days.
COLA/Post Differential	Select the option that identifies the type of cost of living allowance (COLA) or post differential, in addition to the base salary, that the employee is entitled to receive.
Special Employee Pay Code	Identify the special category of pay processing not accommodated in any other part of the NFC payroll/personnel system. This code enables certain operations to be performed which would not otherwise be applicable to this type of employee.
Wage Board Shift Rate	Enter the rate that NFC uses to compute pay for the varied shift time reported on the T&A for wage system employees.
Quarters Deduction Code	Select the code that identifies the type of quarters deduction for the employee.
Quarters Deduction Amount	Enter the monetary amount that is to be deducted through NFC payroll, either per day or per pay period, from the salary of an employee who is being furnished quarters, utilities, or other in kind allowances.

Note: The information entered on this page is for NFC reporting purposes only. Benefit or payroll information that is entered on this page is *not* integrated with PeopleSoft benefit or payroll applications.

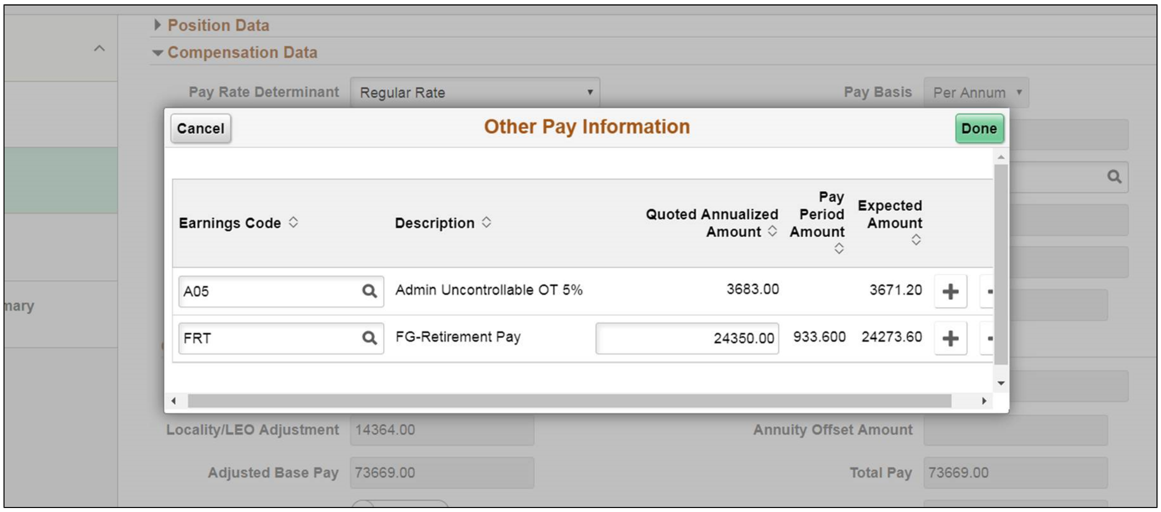
Other Pay Information Page

Use the Other Pay Information page (GVT_OTH_PAY_SCF) to enter compensation that employees receive that's in addition to base pay.

Navigation:

Click the **Other Pay Information** link on the Request Data - Job Related Data Page, Compensation Data section.

This example illustrates the fields and controls on the Other Pay Information page.



Field or Control	***Description***
Earnings Code	Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced. On selecting the Earnings Code, the other fields in the page gets enabled.
Quoted Annualized Amount	Enter the Quoted Annualized Amount. **Note:** This field will be read only for Earnings code, with multiplication factor or constant value defined.
Pay Period Amount	Pay Period amount is displayed. **Note:** If you had selected an Earnings Code with multiplication factor or constant value defined, Pay Period Amount field will not be displayed in the Other Pay Information page. For others, the value appears as read only.
Expected Amount	The system calculates and displays the expected amount.

Note: A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

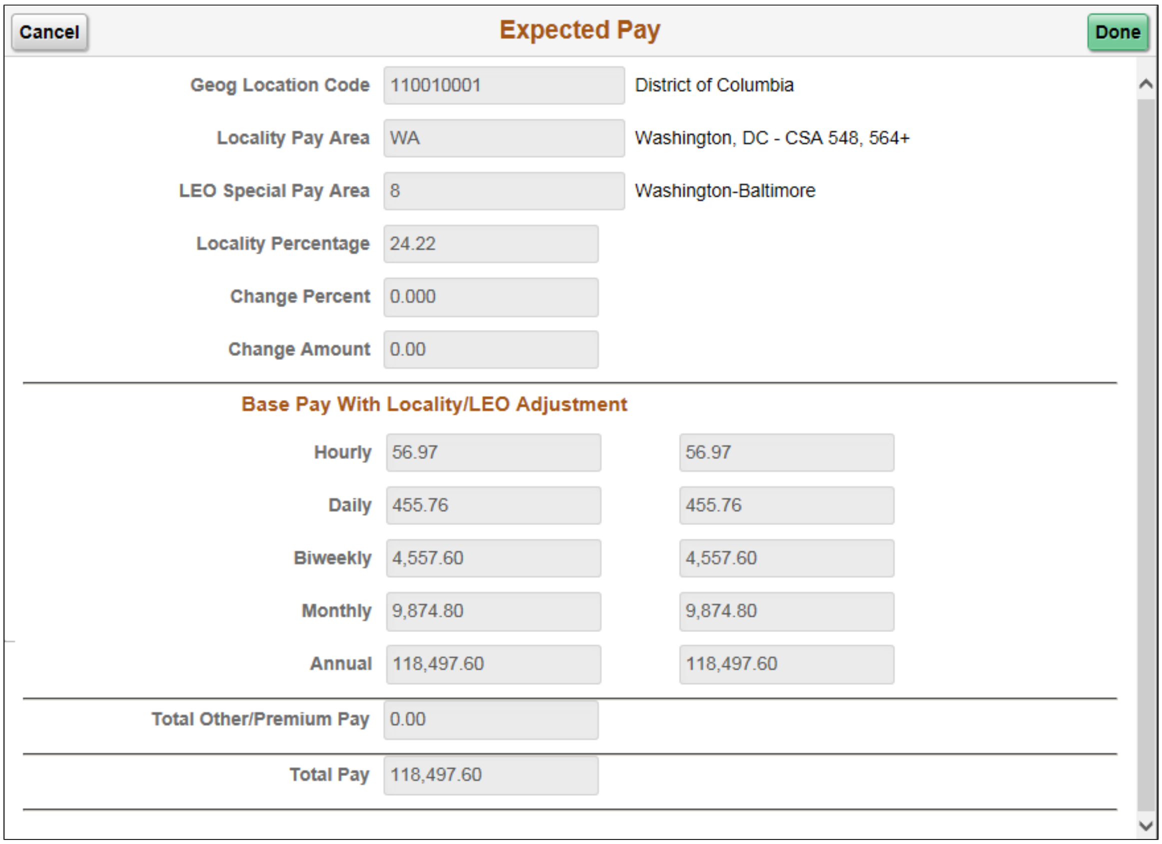
Expected Pay Page

Use the Expected Pay page (GVT_LOC_PAY_SCF) to view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.

Navigation:

Click the **Expected Pay** link on the Request Data - Job Related Data Page, Compensation Data section.

This example illustrates the fields and controls on the Expected Pay page.



Field or Control	***Description***
Locality Percentage or **LEO Percentage** (law enforcement officer percentage)	Displays the locality or LEO percentage. This field shows the **LEO Percentage** label when the *Primary FEPCA* or *Secondary FEPCA* is selected in the **LEO Position** field.
Change Percent	Displays the information regarding a percent change when new rows are inserted that change the base salary amounts.
Base Pay	The system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee based on the base pay and compensation frequency you enter.

Field or Control	***Description***
With Locality	The system calculates the same base pay figures using the locality adjustment listed at the top of the page.
Total Other/Premium Pay	Displays the total of annual expected pay for the items you entered on the Other Pay Information page.
Total Pay	The system calculates total pay by summing the annual pay with the locality adjustment and the total other/premium pay contributions.

Note: The **Rate Change Amount** and **Rate Change Percent** fields are used when awarding increases (not for new hires).

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Note: In the case of an employee that is subject to reaching a pay cap/limit, the compensation rate is displayed correctly, however, the change amount and change percent are displayed differently depending on whether you view this information on this page or on the commercial compensation pages.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and this page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

This page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation Data section. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information Page. So, as a result of using 2087 in these calculations, the estimated quoted pay in the Compensation Data section is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

Difference between quoted and expected pay on an annual basis = 20,940 USD.

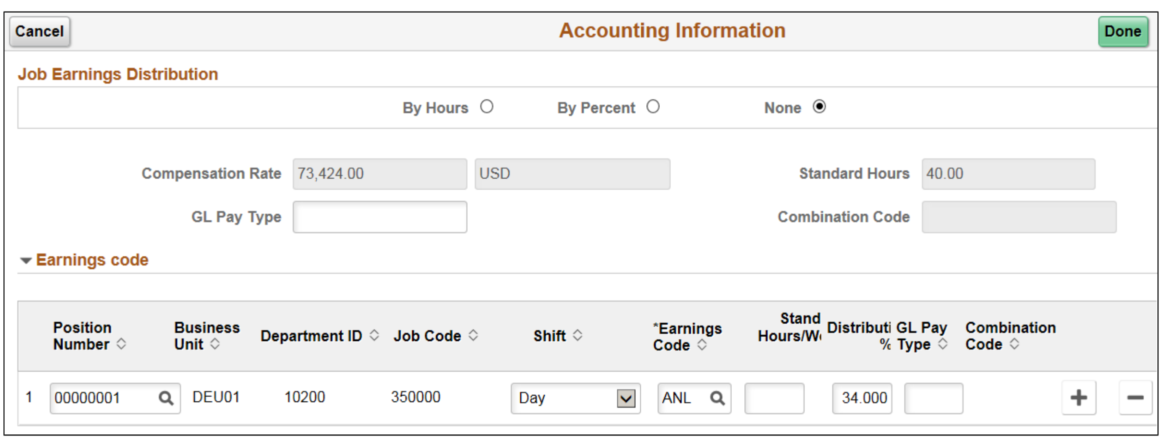
Accounting Information Page

Use the Accounting Information page (GVT_JOBDIST_SCF) to view a summary of the employee's job earnings distribution.

Navigation:

Click the **Accounting Information** link on the Request Data - Job Related Data Page, Compensation Data section.

This example illustrates the fields and controls on the Accounting Information page.



Field or Control	*Description*
Job Earnings Distribution	Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all. When you select the **By Hours** or **By Percent** options, the **GL Pay Type** and **Account Code** fields are unavailable for entry. Use multiple rows to distribute earnings among departments. If you select the **By Hours** option, then enter the hours to be distributed to each department in the **Standard Hours** field corresponding to each department entered. If you select the **By Percent** option, enter a percentage corresponding to each department in the **Percent of Distribution** field. Percentages must total 100 percent and must equal the value in the **Standard Hours** field.
Compensation Rate	Displays the annual salary, including the locality and LEO adjustments.
Standard Hours	Display the default value from the job code.
GL Pay Type (general ledger pay type)	Enter the GL pay type that has been established by your agency.
Position Number, Business Unit, Department ID, Job Code, and **Shift**	Select the business unit, department, job code, position, and shift to which to charge the earnings.
Earnings Code	Specify the earnings code. This will default to the regular earnings code defined on the Paygroup Table.
Standard Hours/Week (standard hours per week)	If you select the **By Hours** option, then specify how many hours will be charged to the corresponding earnings code.
Distribution % (percent of distribution)	If you select the **By Percent** job earnings distribution option, enter the percent to be charged to the corresponding earnings code.

Request Data - Employment Data Page

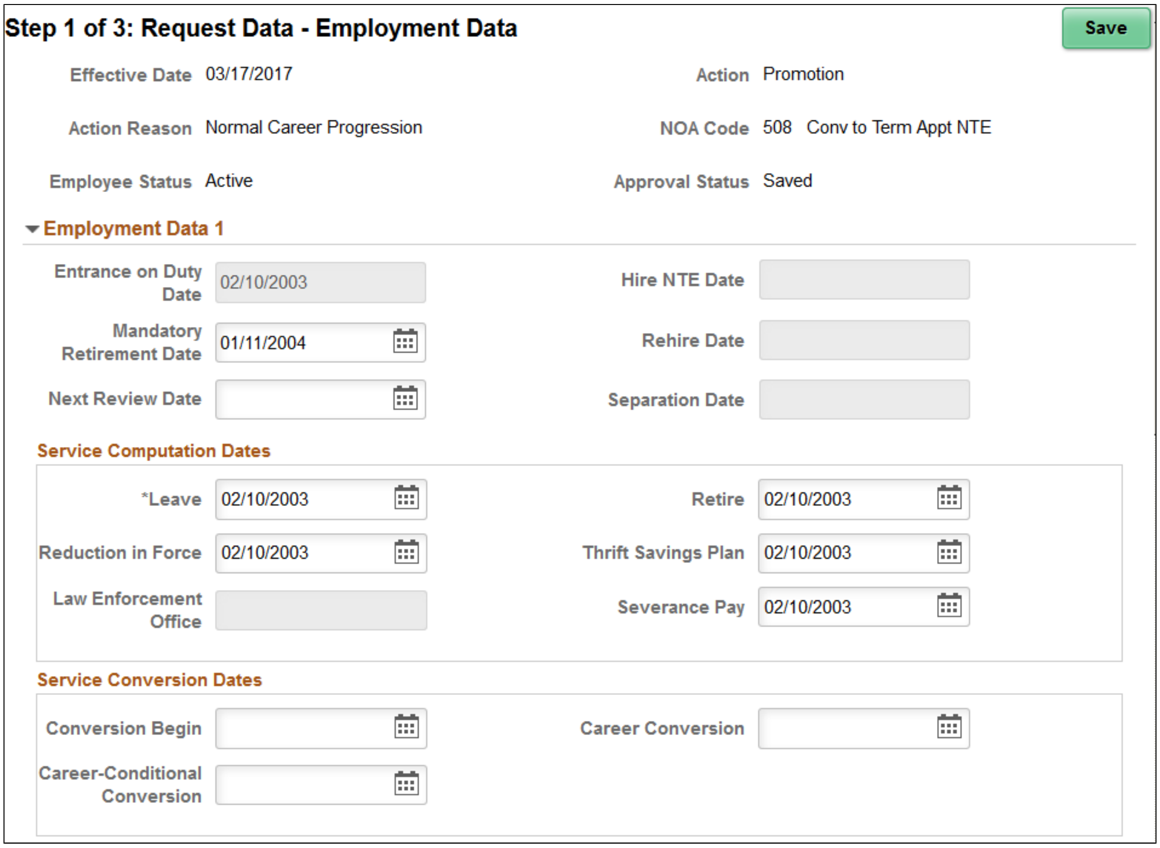
Use the Request Data - Employment Data page (GVT_EMPLOYMENT1_FL) to enter employment information, such as employee service computation and conversion dates, within-grade-increase data, union, probation, RIF, tenure, and security data. Also record the retained grade information.

Navigation:

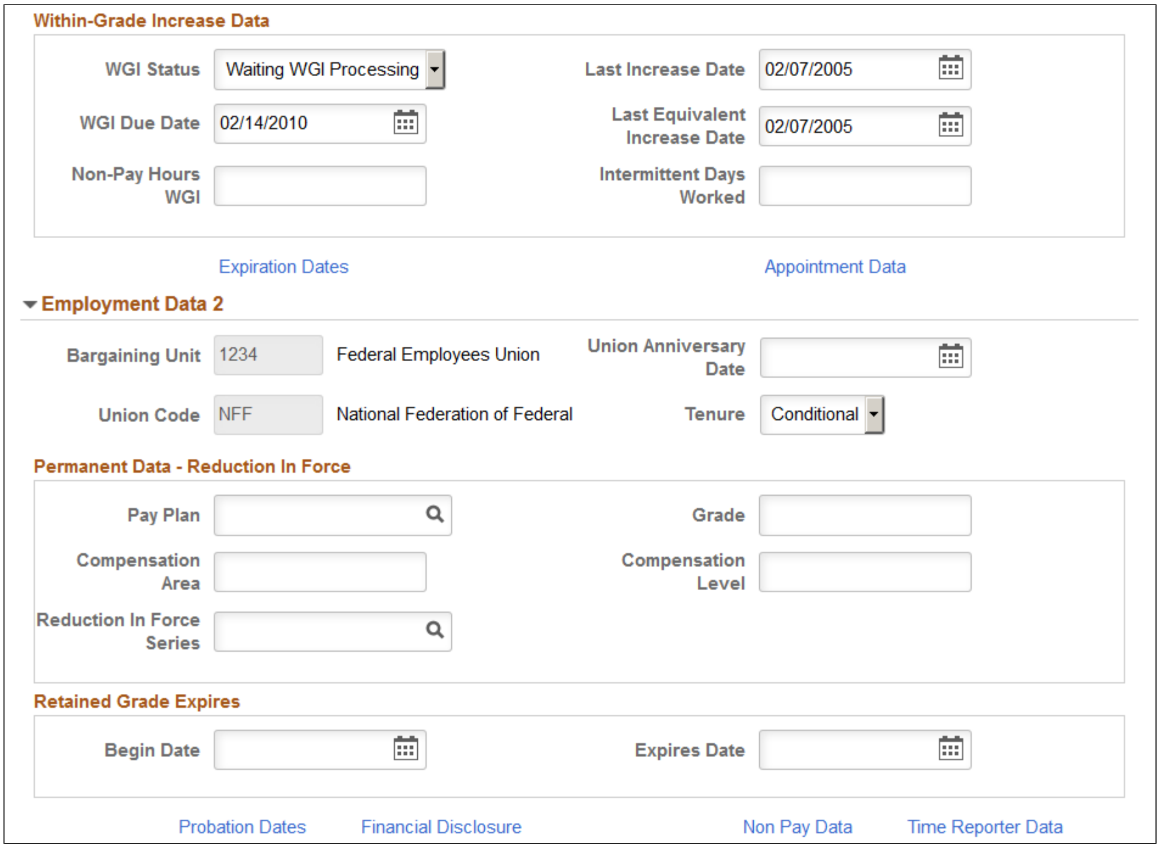
- Click the **Employment Data** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.
- Click the **Next** button on the Request Data - Job Related Data Page.

- Click the **Previous** button on the Validate Data Page.

This example illustrates the fields and controls on the Request Data - Employment Data page (1 of 2).



This example illustrates the fields and controls on the Request Data - Employment Data page (2 of 2).



Many values on this page are set by default from values entered in the **Department** and **Job Code** fields on the Request Data - Job Related Data Page. When adding an employment instance, the system populates most of the dates on this page with the effective date of the action. These dates are used later in various ways to calculate the employee's service time. Override these values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Related Data pages, the system will display the rehire date.

Employment Data 1

The field is

Field or Control	***Description***
Entrance on Duty Date	Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.

Field or Control	***Description***
Hire NTE Date (hire not to exceed date)	Set by default from the **Not to Exceed Date** field on the Request Data - Data Control Page. In the case of a temporary hire, it designates the length of time the temporary employment can last.
Mandatory Retirement Date	If applicable, enter the employee's mandatory retirement date.
Next Review Date	Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.
Separation Date	Shows the date that the employee left employment. This field is display-only.

Service Computation Dates

Field or Control	***Description***
Leave	Enter the service computation date for beginning the employee's leave computation.
Retire	Enter the service computation date for beginning the employee's retirement computation.
Reduction In Force	Enter the computation date for establishing the employee's RIF position.
Thrift Savings Plan	Enter the computation date for beginning the employee's thrift savings plan eligibility computation.
Law Enforcement Office	Enter the computation date for beginning the employee's law enforcement office retirement computation.
Severance Pay	Enter the service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Field or Control	***Description***
Conversion Begin, Career Conversion, and **Career-Conditional Conversion**	Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the **Career Conversion** date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the **Career-Conditional Conversion** date field is the effective date for that transaction.

Within-Grade Increase Data

Field or Control	***Description***
WGI Status (within-grade increase status)	Enter the WGI status, such as *(none), Approved, Waiting, Denied, N/A,* or *Postponed.* For a new employee, the default value is *Waiting. Created* is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is *Waiting* or *Approved.*
Non Pay Hours WGI and **Intermittent Days Worked**	Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the **Non Pay Hours WGI** field with nonpay hours from the WGI/Tenure Update report. **Note:** The WGI/Tenure Update process is a North American Payroll process specific to U.S. Federal government customers.

Field or Control	*Description*
Last Increase Date, WGI Due Date, and **Last Equivalent Increase Date**	The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the **WGI Due Date** field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 2017, then your pay calendars need to be set up for 2017, 2018, 2019, and 2020. If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the **WGI Due Date** field with the extended due date from the WGI/Tenure Update report.

Employment Data 1 Links

Field or Control	*Description*
Expiration Dates	Click to access the Expiration Dates Page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Data	Click to access the Appointment Data Page and enter appointment limits.

Employment Data 2

Field or Control	*Description*
Bargaining Unit	Select a code representing the bargaining unit to which the employee belongs.
Union Code	If your new employee belongs to a union, select the appropriate union code.

Field or Control	*Description*
Union Anniversary Date	If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.
Tenure	Indicate the type of tenure.

Permanent Data - Reduction In Force

These informational fields enable the agency to track the employee relative to RIF processing.

Field or Control	*Description*
Pay Plan and **Grade**	Enter the employee's pay plan and pay grade.
Compensation Area and **Compensation Level**	Enter the employee's compensation area and level.
Reduction In Force Series	Select the employee's RIF series.

Retained Grade Expires

Field or Control	*Description*
Begin Date and **Expires Date**	Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

Employment Data 2 Links

Field or Control	*Description*
Probation Dates	Click to access the Probation Dates Page and enter information related to probation periods.
Financial Disclosure	Click to access the Financial Disclosure Page and enter information related to the employee's financial disclosure requirement.

Field or Control	Description
Non Pay Data	Click to access the Non - Pay Data Page and enter information related to a status of non-pay.
Time Reporter Data	Click to access the Time and Labor Data Page and review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Time and Labor, the link is unavailable.

Related Links

Understanding Automatic Action Processing
"Creating Balance IDs" (Application Fundamentals)
Understanding Automatic Action Processing

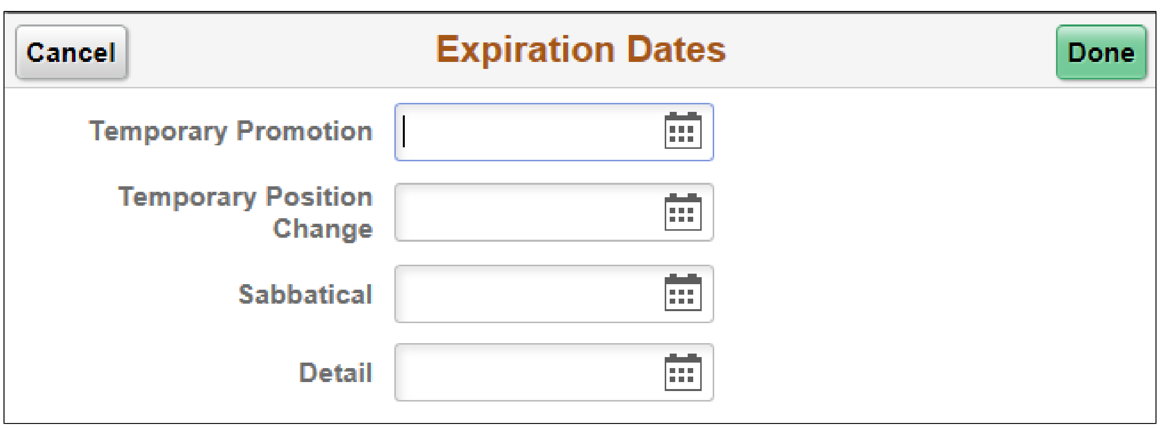
Expiration Dates Page

Use the Expiration Dates page (GVT_EXPIRDT_SCF) to enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

Navigation:

Click the **Expiration Dates** link on the Request Data - Employment Data Page.

This example illustrates the fields and controls on the Expiration Dates page.



The following fields, which are updated by the user, are informational only.

Field or Control	Description
Temporary Promotion	Enter the temporary promotion date.
Temporary Position Change	Enter the temporary position change expiration date.

Field or Control	*Description*
Sabbatical	Enter the sabbatical expiration date.
Detail	Enter the detail assignment expiration date.

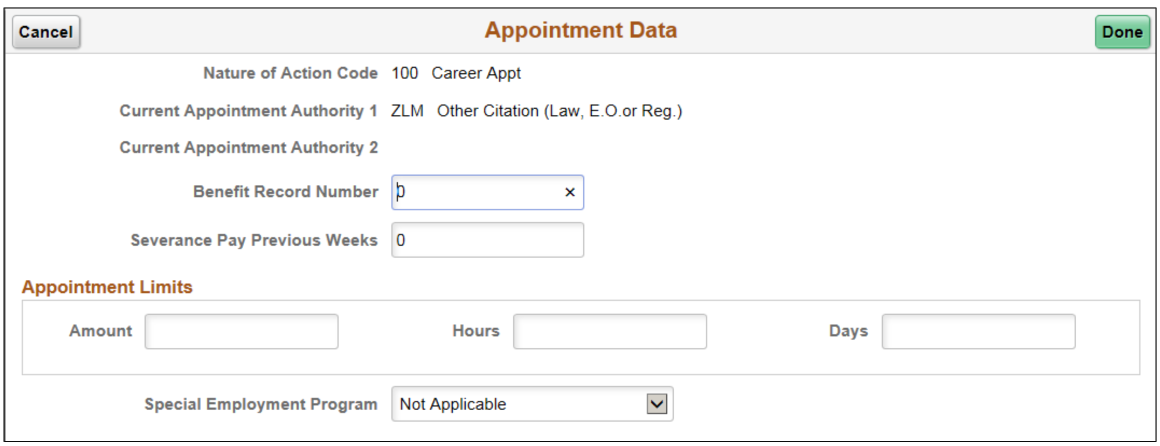
Appointment Data Page

Use the Appointment Data page (GVT_APPDATA_SCF) to enter appointment limits and indicate if this person is in a special employment program.

Navigation:

Click the **Appointment Data** link on the Request Data - Employment Data Page.

This example illustrates the fields and controls on the Appointment Data page.



Field or Control	*Description*
Nature of Action Code, Current Appointment Auth Nbr 1 (current appointment authorize number 1) and **Current Appointment Auth Nbr 2** (current appointment authorize number 2)	Displays the fields maintained to reflect historic data on the employee's current appointment authority, that was used to authorize the employee's hire.
Benefit Record Number and **Severance Pay Previous Weeks**	For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).
Amount, Hours, and **Days**	Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.
Special Employment Program	Indicate the special employment program: *Not Applicable, Other, Presidential Mgt Intern, SES Candidate Development,* or *Veteran's Readjustment Program.*

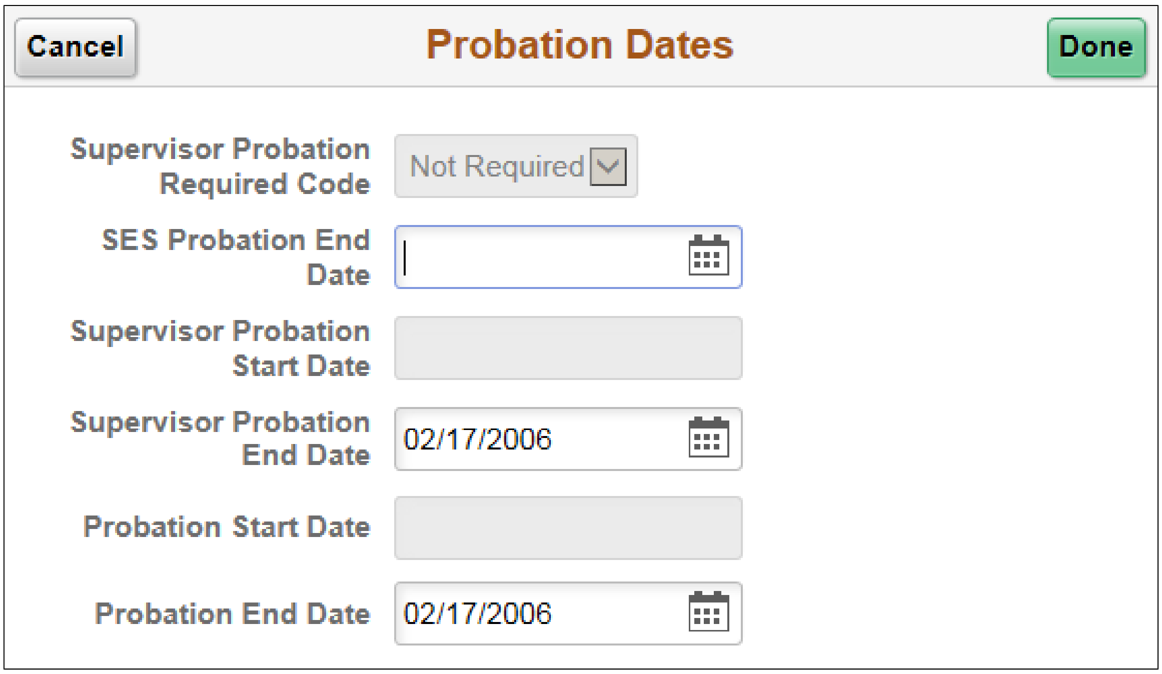
Probation Dates Page

Use the Probation Dates page (GVT_EMPL_PROB_SF) to document any probation start and end dates that apply to this person.

Navigation:

Click the **Probation Dates** link on the Request Data - Employment Data Page.

This example illustrates the fields and controls on the Federal Probation Dates page.



Field or Control	***Description***
Supervisor/Mgr Prob Reqd Code (supervisor manager probation required code)	Identify whether a supervisory/managerial probationary period is required, served, or waived.
SES Probation End Date (Senior Executive Service probation end date)	Enter the applicable probation end date.
Supervisor/Mgr Probtn Start Dt (supervisor/manager probation start date)	Enter the starting date for the supervisory/managerial probationary period, or for the SES probationary period.
Supervisor/Mgr Probtn End Date (supervisor/manager probation end date)	Enter the applicable probation end date.
Probation Start Date	Identify whether the employee's appointment is subject to completion of a one year probationary (or trial) period and to show the commencing date of the probationary period.
Probation End Date	Enter the applicable probation end date.

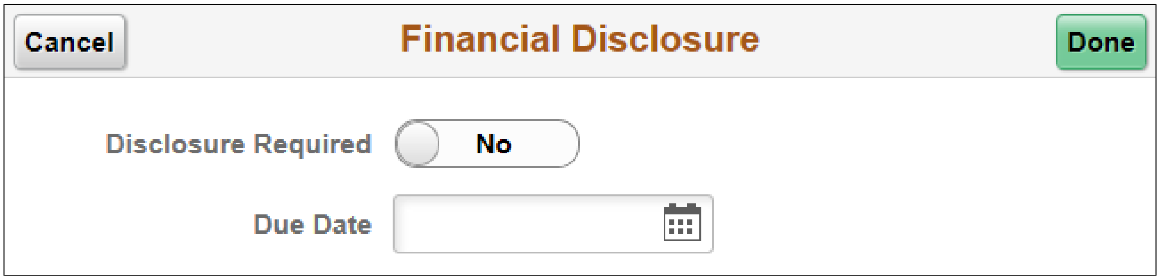
Financial Disclosure Page

Use the Financial Disclosure page (GVT_SECURTY_SCF) to indicate if financial disclosure is required and the due date.

Navigation:

Click the **Financial Disclosure** link on the Request Data - Employment Data Page.

This example illustrates the fields and controls on the Financial Disclosure page.



Field or Control	***Description***
Financial Disclosure Required and **Due Date**	If a financial disclosure is required, switch to *Yes* and enter the due date for receipt.

Related Links

"(USF) Setting Up Position Titles" (PeopleSoft Human Resources Manage Positions)
"Creating Positions" (PeopleSoft Human Resources Manage Positions)
"Classifying Jobs" (Application Fundamentals)

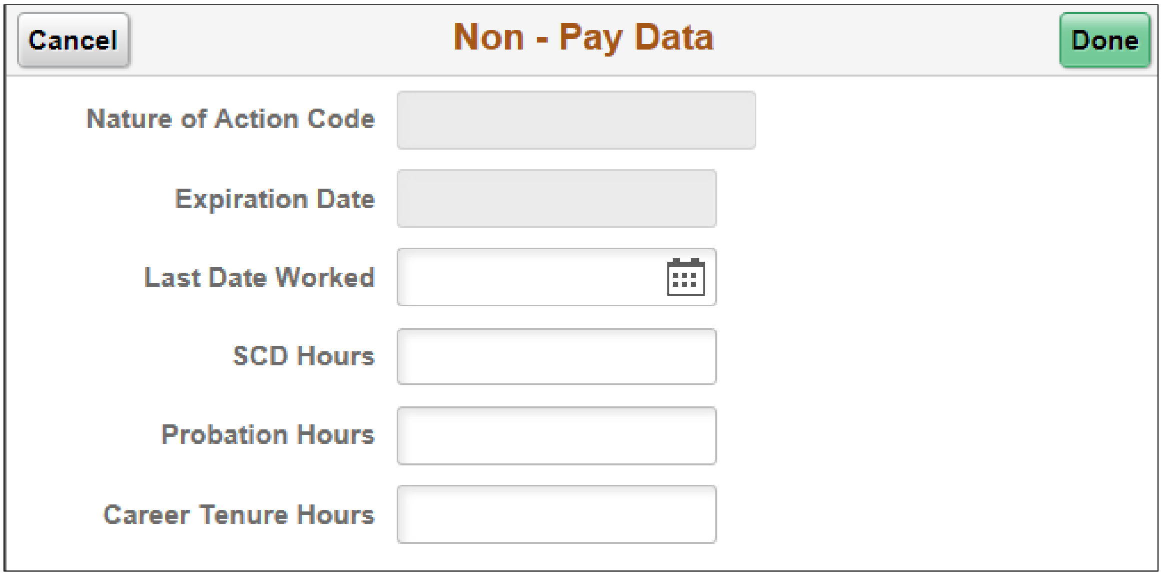
Non - Pay Data Page

Use the Non - Pay Data page (GVT_NONPAY_SCF) to track information related to a status of nonpay.

Navigation:

Click the **Non Pay Data** link on the Request Data - Employment Data Page.

This example illustrates the fields and controls on the Non - Pay Data page.



Information on this page affects FEHB eligibility and FEGLI.

Field or Control	***Description***
NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
Expiration Date	Displays the nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	Enter the date last worked prior to being placed in a nonpay status.
SCD Hours, Probation Hours, and **Career Tenure Hours**	Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

Time and Labor Data Page

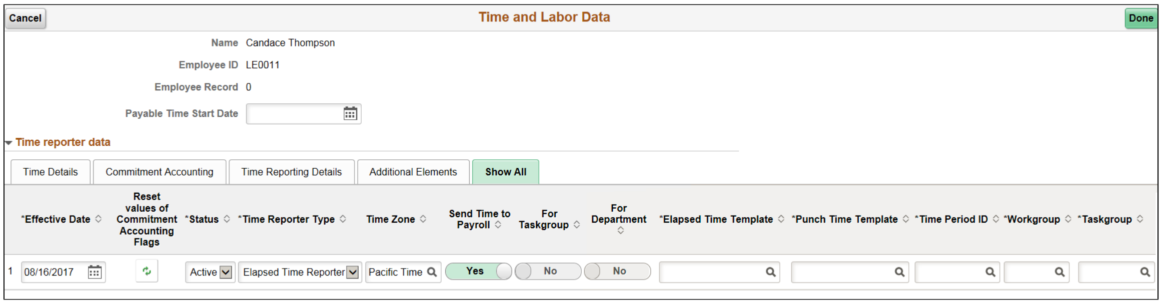
Use the Time and Labor Data page (TL_EMPL_DATAFG_SCF) to review or enter PeopleSoft time and labor data for this employee.

Navigation:

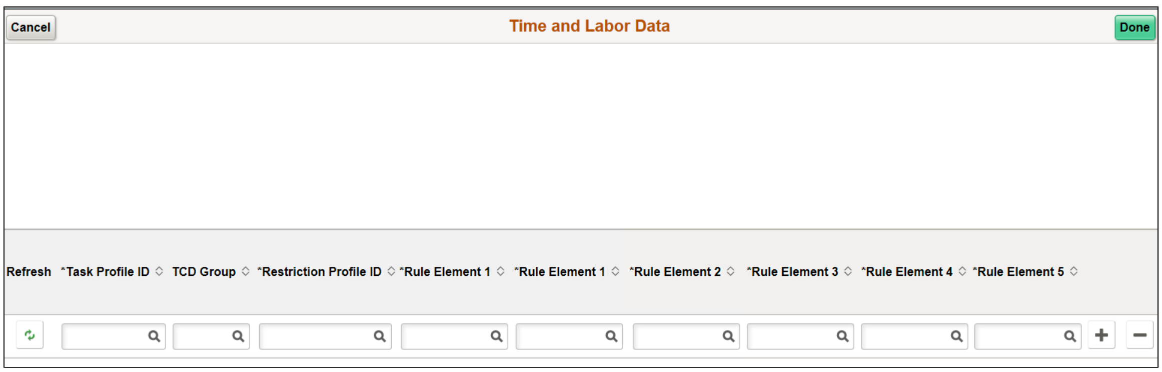
Click the **Time Reporter Data** link on the Request Data - Employment Data Page.

Note: If you aren't using PeopleSoft Time and Labor, the **Time Reporter Data** link is unavailable.

This example illustrates the fields and controls on the Time and Labor Data page (1 of 2).



This example illustrates the fields and controls on the Time and Labor Data page (2 of 2).



For more detailed information on the Time and Labor fields, see the documentation for the “Create Time Reporter Data Page” (PeopleSoft Time and Labor).

Field or Control	***Description***
Payable Time Start Date	Enter the date for the system to start creating payable time for the time reporter. This date is important for time reporters in a workgroup defined for exception time reporting who will have payable time created from schedules.
Workgroup	Select a workgroup for the time reporter. It identifies the default TRC program, rule program, holiday schedule, time reporting period, and other information that the system uses when processing reported time for this person.
Taskgroup	Enter a taskgroup, which identifies the default task template, task profile, and time reporting templates that the system uses when collecting and processing reported time for this time reporter. If the time reporter's department is set up for commitment accounting (the **For Department** option is set to *Yes* in the **Commitment Accounting** section), you must assign a task group that's defined for commitment accounting. When you do so, the system enables in the **For Taskgroup** option to *Yes*.

Field or Control	***Description***
Task Profile ID	Select a task profile ID for the system to use a different default task profile ID than that assigned to the time reporter's task group. Task profiles define the tasks to which a person's reported time is allocated automatically if task information is not reported.
TCD Group (Time Collection Device Group)	If the time reporter uses a TCD, such as a time clock or badge scanner to report time, select the appropriate TCD group. The TCD group identifies the TCDs that the time reporter is authorized to use.
Restriction Profile ID	Select a restriction profile ID in this field to apply a different restriction profile than that assigned to the time reporter's TCD group. This field applies only if the time reporter uses a time clock device to report time.
Rule Elements 1-5	Assign up to five rule elements to a time reporter. When you run the Time Administration process, the system retrieves the values of the time reporter's rule elements and makes the values available for rules processing. This feature enables you to tailor rules to a specific population of time reporters.
Reset values of Commitment Accounting Flags	Click this button for the system to refresh the fields in the Commitment Accounting section.
Time Reporter Type	Identify how the time reporter will enter time: a *Punch Time Reporter* or an *Elapsed Time Reporter*.

Payroll

Field or Control	***Description***
Send Time to Payroll	Switch to *Yes* to integrate Time and Labor with, and send this time reporter's payable time to, a payroll system.

Commitment Accounting

Field or Control	***Description***
For Taskgroup	Displays as *Yes* automatically if the task group for the time reporter (in the **Taskgroup** field) is defined for commitment accounting.

Field or Control	Description
For Department	Displays as *Yes* automatically if the time reporter's department is defined for commitment accounting in People Soft Human Resources. When the **For Department** check box is selected, assign the task reporter a task group that is also defined for commitment accounting.
Time Zone	Select the time zone in which the time reporter enters time. The system automatically populates the field with the base time zone defined with PeopleTools Utilities.

Request Data — Attachments page

Use the Attachments page (GVT_ATTACH_FL) to add, view or delete attachments associated with a Personal Action Request.

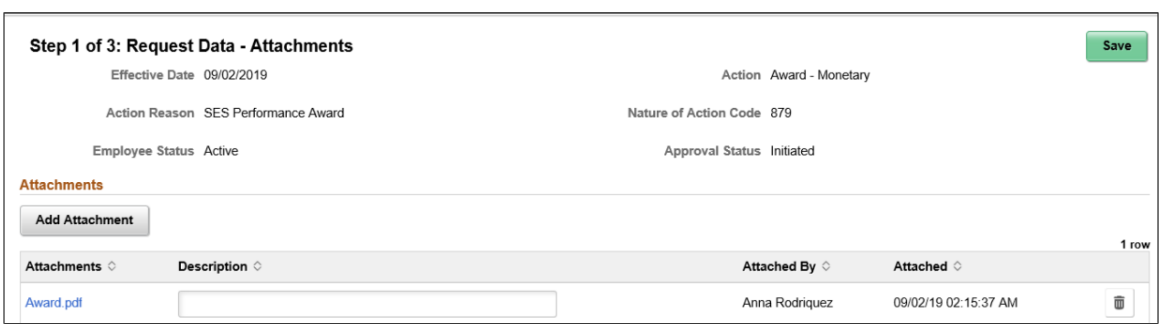
The attachments are routed for approval and available for review to the Personnel Action Request approvers.

Note: You can enable or disable the Attachments functionality in Guided PAR transactions using the Page and Field Configuration, based on requirements.

Navigation:

- Click the **Attachments** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.
- Click the **Next** button on the Request Data - Job Related Data page.

This example illustrates the fields and controls on the Request Data — Attachments page. You can find definitions for the fields and controls later on this page.



Click the Add Attachment button to open the File Attachment page and upload a file. After you have selected and uploaded the file, click Done to return to this page. The uploaded file will appear as an active link in the Attachments field. The page will display the date and time the file was uploaded.

Field or Control	***Description***
Attachments	Click the Attachments link to open the attachment.
Description	Meaningful description for the attachment.
Attached By	Displays the name of the requester who uploaded the file.
Attached	Displays the date that the administrator uploaded the file to the request.

Click the Delete button to remove the file from the page. The system will ask for confirmation that you want to delete this file. Click Yes to delete the file. This will automatically save the page with your deletion of the file.

Validate Data Page

Use the Validate Data page (GVT_CPDF_FL) to initiate online regulatory edits for this PAR transaction and review edits and errors.

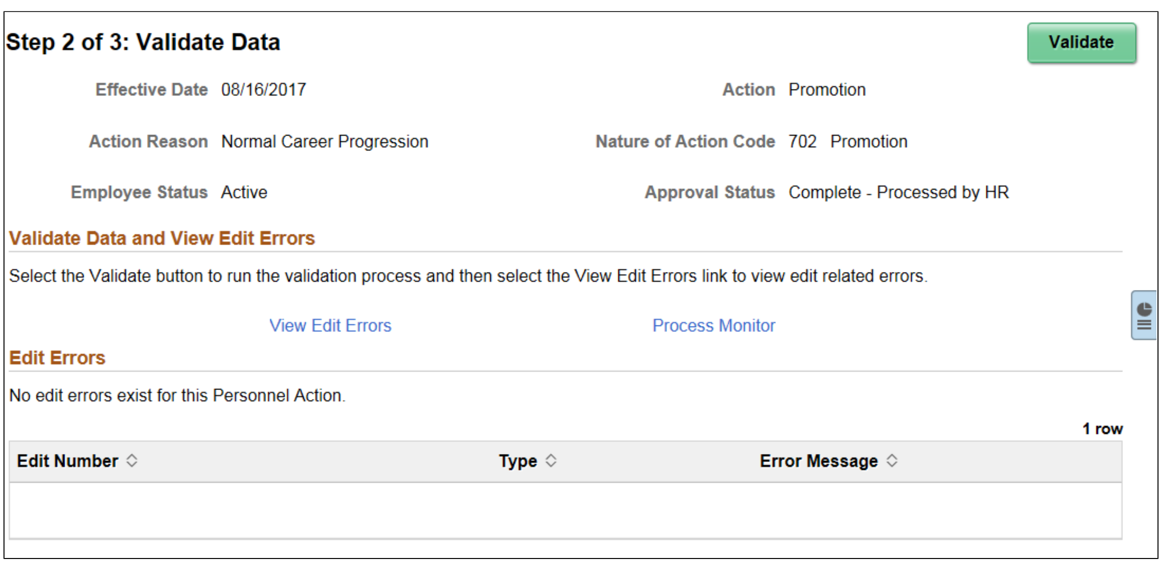
Navigation:

- Click the **Validate Data** page tab category from the left panel of the Create/View Personnel Actions - <Transaction Name> pages.

  Note: This option is available after you have saved the information entered in the Request Data step.

- Click the **Next** button on the Request Data — Attachments page or the **Previous** button from the Transaction Summary Page.

This example illustrates the fields and controls on the Validate Data page.



Field or Control	*Description*
Validate	Click this button to run the CPDF edit validation process. Edits should be triggered after all information is entered. **Note:** Validation is an optional step. Depending on the state of the transaction, all edits may not run to completion because all data may not have been captured up to that point. Push Notification will appear on the banner once the validation process gets completed.
View Edit Errors	Click this link to view regulatory edit errors resulting from the validation process. The report lists the CPDF errors identified by the CPDF Validation process. If no errors were generated, when you click the link a message will display stating that currently, there are no edit validation errors to review. If there are errors, correct any errors, save, and validate the transaction again.
Process Monitor	Click this link to open the Process Monitor in another window and view the status of the process.

Related Links

"Processing CPDF Files" (PeopleSoft Human Resources Meet Regulatory Requirements)

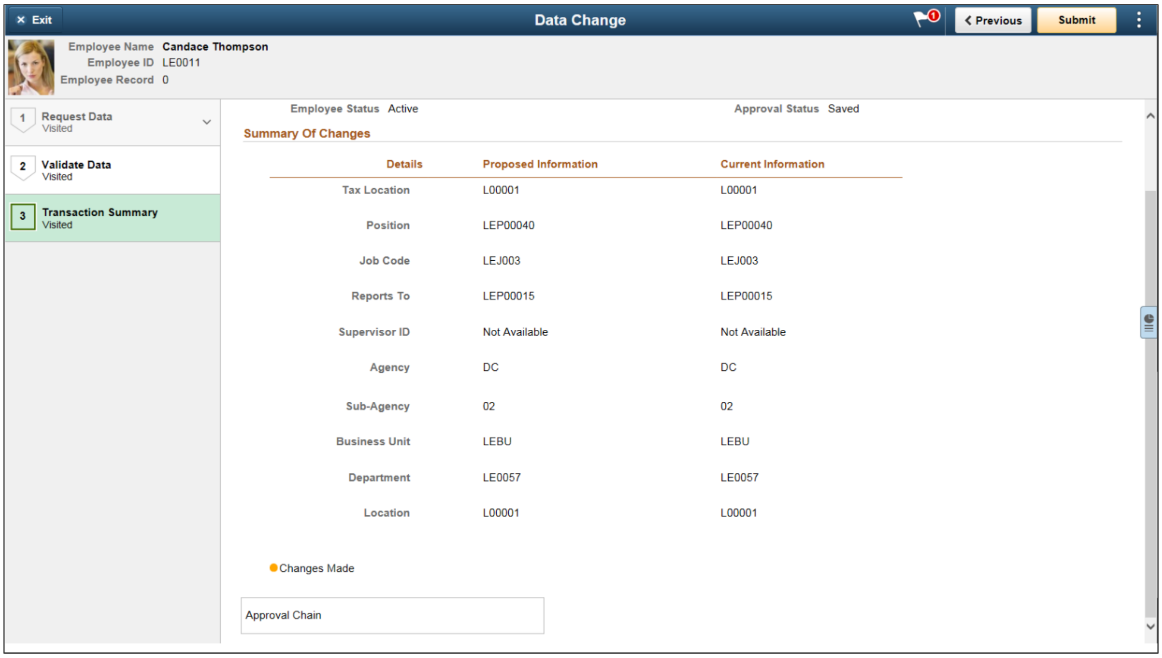
Transaction Summary Page

Use the Transaction Summary page (GVT_SUMMARY_FL) to submit the PAR transaction request. This page will contain the summary of the changes you have made along with the existing data. The data that needs to be displayed in this page can be configured. For more information, see Defining Transaction Summary Configuration

Navigation:

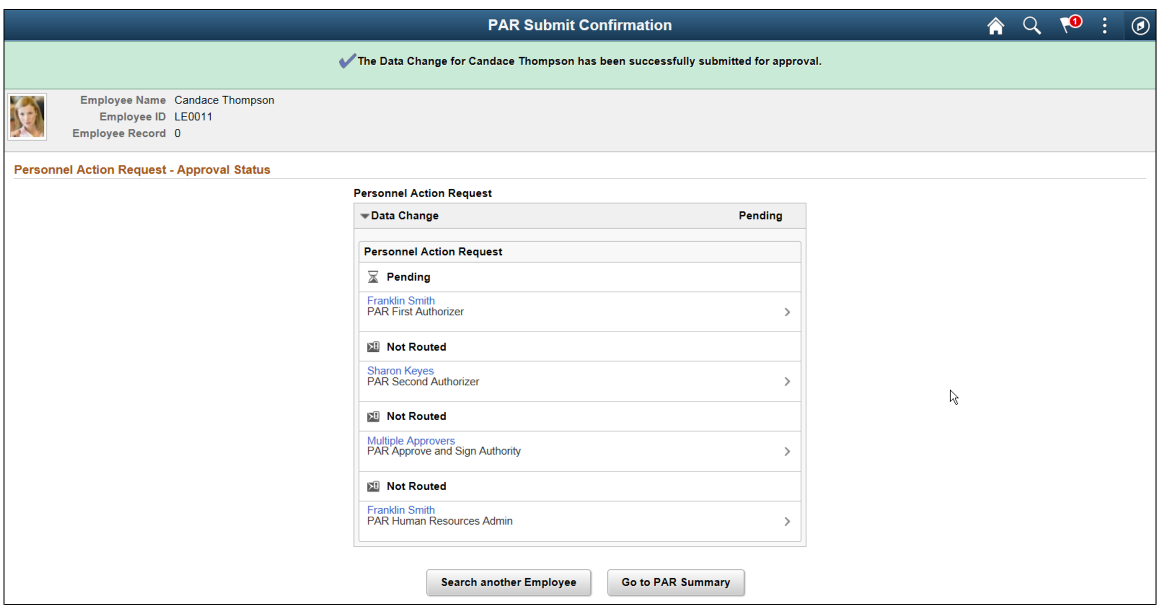
- Click the **Transaction Summary**step from the left panel of the Create/View Personnel Actions.
- Click the **Next** button from the Validate Data Page.

This example illustrates the fields and controls on the Transaction Summary page.



This page displays the **Submit** button in the banner of the page. See Create/View Personnel Actions Activity Guide Framework. After you have submitted this transaction, PAR Submit Confirmation page will be displayed. You can view the approval chain and the approval status on this page.

This example illustrates the PAR Submit Confirmation page.



Field or Control	Description
Search another Employee	Click the button to navigate to the Personnel Search page.

Field or Control	***Description***
Go to PAR Summary	Click the button to navigate to the Create/View Personnel Actions Page of the employee for whom the request is submitted.

Creating a Retroactive PAR

An HR administrator may need to create a personnel action request for a past date prior to the latest PAR row. The process followed for creating a retroactive PAR is similar to the normal PAR process except for a few additional steps.

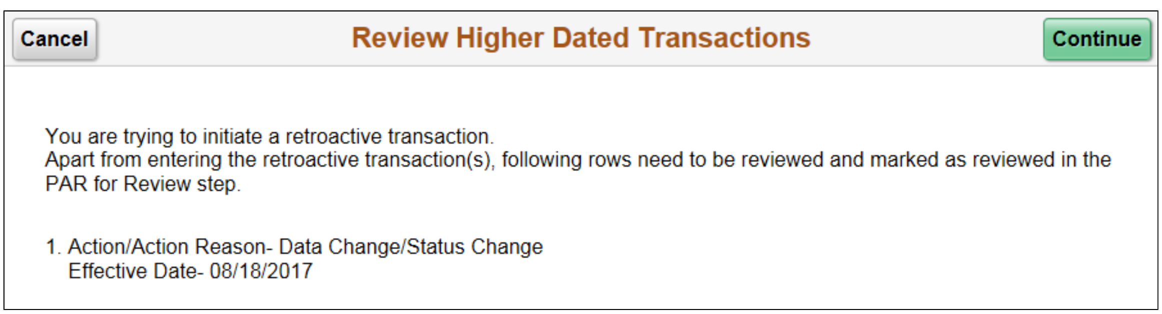
For creating a retroactive PAR:

- Access the Create Personnel Action USF Tile from your homepage
- Select the employee
- Click the Create Personnel Action button
- Enter the effective date. If you enter a past date prior to the latest PAR row as the effective date, system automatically identifies and process the request as retroactive personnel action request.

  Note: You will receive an error message, if you try to add a personnel action request on top of a row (PAR) which is in Saved or In Progress status.

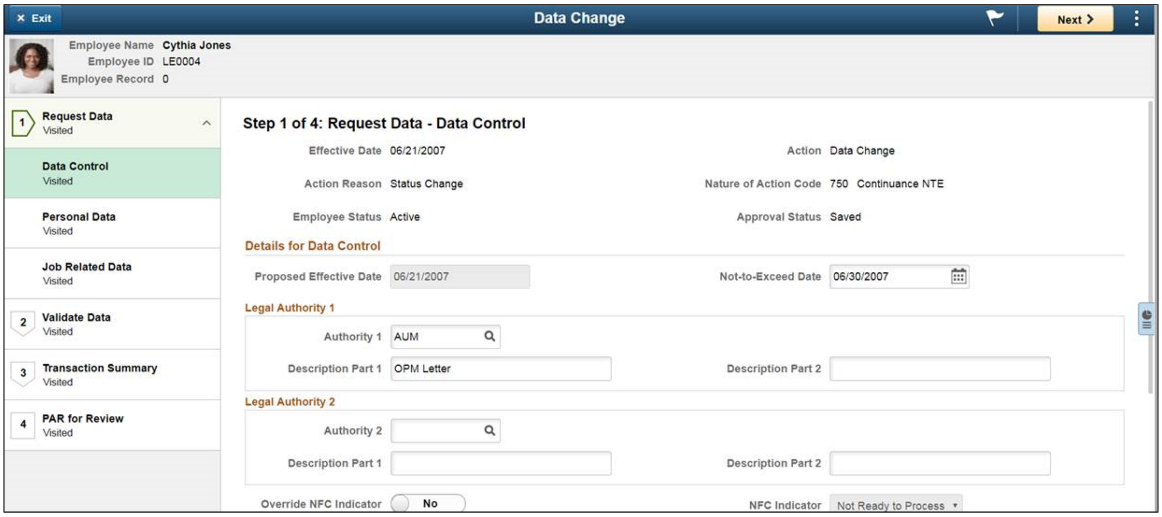
- Once you select a past date prior to the latest PAR row as effective date, enter the details and click Continue, the following alert message will be displayed.

  This example illustrates the Review Higher Dated Transactions Alert



- On clicking continue, Request Data — Data Control page is displayed with PAR for Review tab on the left panel.

This example illustrates the Activity Guide with PAR for Review step.



For more information on the fields and controls of the page, see Request Data - Data Control Page.

PAR for Review Page

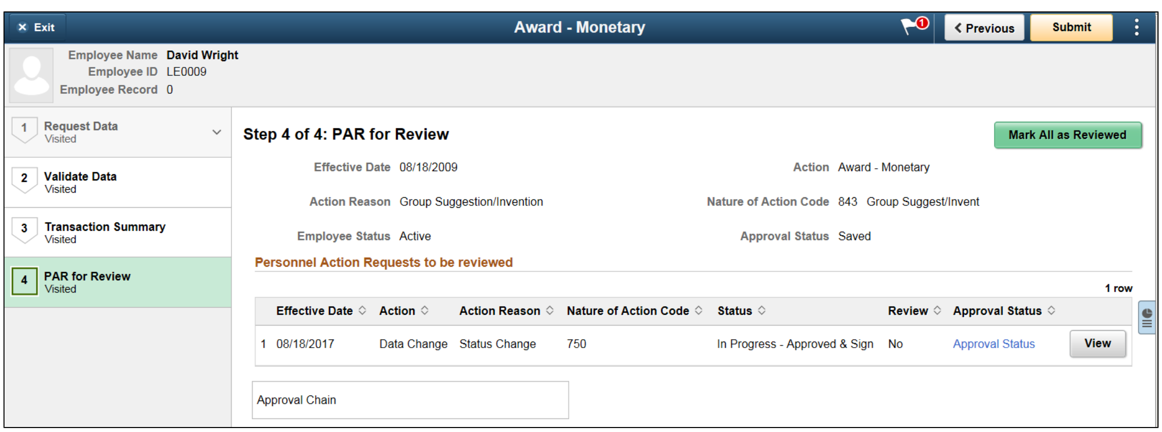
Use the PAR for Review page (GVT_PAR_RVW_FL) to view the higher dated action requests that are affected by the retroactive PAR.

You can view the list of PAR with succeeding dates (date later than the retroactive PAR) which needs to be reviewed before approving the retroactive PAR. This will ensure that the retroactive addition and the existing actions are synchronised.

Navigation:

- Click the **PAR for Review** step from the left panel of the Activity Guide.
- Click the **Next** button from the Transaction Summary Page.

This example illustrates the fields and controls on the PAR for Review page



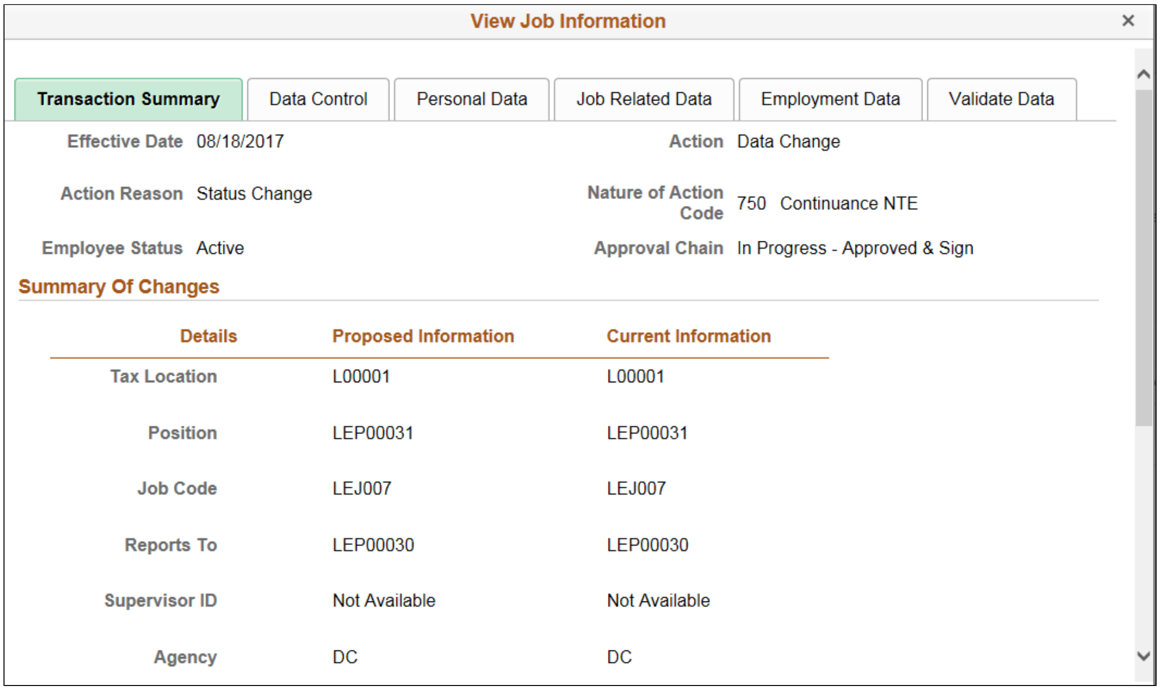
<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Mark All as Reviewed</td><td>Use Mark All as Reviewed button to mark all the listed actions as reviewed.

Once you have marked the actions as reviewed:

• The value in the Review field changes to ‘Yes’.

• For each PAR in the list, users with the PAR Analyst role receives an e-mail notification and a push notification to make corrections/cancellations.
<hr>Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 48 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).<hr><hr>Note: System doesn't allow to submit a retroactive request until you have marked the actions as reviewed. If you exit the Activity Guide without submitting the request, you will have to again mark the actions as reviewed prior to submission.<hr></td></tr>
<tr><td>Approval Chain</td><td>Use the Approval Status link to view the approval chain and status of each reviewer for the selected PAR.</td></tr>
<tr><td>View</td><td>Click the View button to view the PAR transaction details.</td></tr>
</table>

This example illustrates View Job Information Page.



Authorizing and Approving Personnel Actions Using Fluid

Once a PAR request is submitted, the request is routed to the designated authorizers for approvals.

Using Fluid Approvals, the approvers can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more information from the requester/ originator or disapprove the request so that it will not be processed further.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 48 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

This topic discusses on how to take action on PAR requests using Fluid Approvals.

Note: It is recommended not to use full screen mode to open a new window while using iOS devices.

Pages Used to Authorize and Approve Personnel Actions Requests

Page Name	***Definition Name***	***Usage***
Pending Approvals - Personnel Action Request Page	EOAWMA_TXNHDTL_FL	Review and take action on a Personnel Action Request using Fluid Approvals.

Understanding Approvals for Personnel Action Requests

The common Approval Framework is used for defining the approvers for the different transactions. For more information, see "Understanding Approvals" (Application Fundamentals).

The following navigation options provide direct access to the fluid Pending Approvals page:

- Click the Approvals tile on the Manager Self Service home page.
- Click the Notifications icon in the banner that appears across the top of PeopleSoft pages, then click an approval notification.

Note: There can be multiple Approvers/ Authorizers for reviewing and approving a PAR request. All the Approvers can access the PAR approval request using their respective Pending Approvals page. Based on the role of Approvers, the field/links available in the Approvals page may vary.

PAR Administrators can configure users as 1st authorizer, 2nd authorizer, Position Administrator and the Final HR for approving a Personnel Action Request. There is also the provision to route the approval request through the Approve and Sign authority, based on the configuration made in the "PAR Approving Officials Table Page" (Application Fundamentals)

For more information on approving transaction as a Position Administrator see Approving Transaction as a Position Administrator

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Note: If you enable delegation for approval, approvers can delegate approval authority to proxies for specified amounts of time. The system gives the proxy access to the Pending Approvals component.

Approvals can also be enabled for Cancellation/ Correction request based on requirement. Only the users with PAR Specialist role can Approve, Deny or Pushback the Cancellation/Correction request. For more information on enabling Approvals, see Enabling Approvals for Canceling/Correcting a PAR

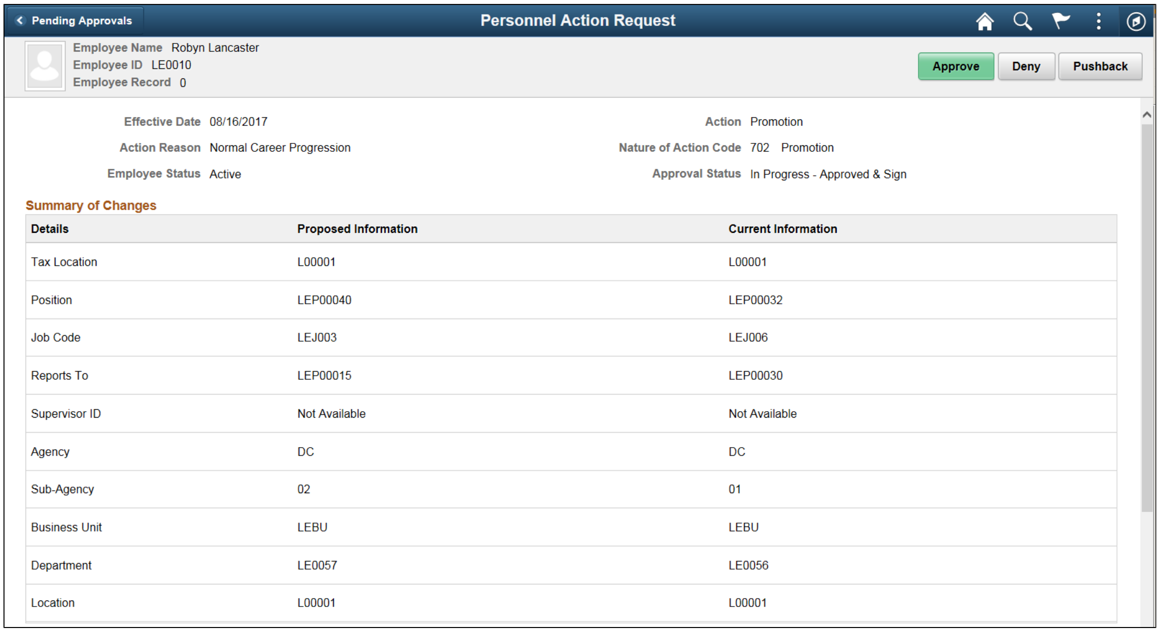
Pending Approvals - Personnel Action Request Page

Use the Pending Approvals - Personnel Action Request page (EOAWMA_TXNHDTL_FL) to review and take action on a PAR transaction using Fluid Approvals.

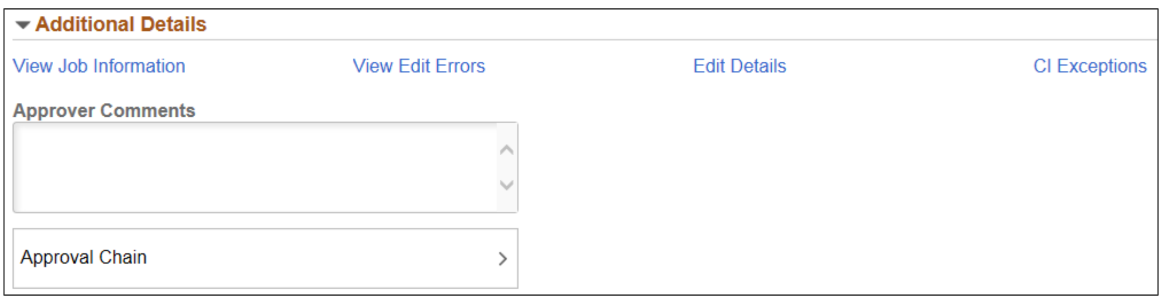
Navigation:

Click the Approvals tile on the Manager Self-Service home page or the Notifications button in the banner to access the Pending Approvals page. Click Personnel Action Request from the left panel and select a PAR entry from the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Personnel Action Request page (As a Final HR Approver)



This example illustrates the fields and controls on the Pending Approvals - Personnel Action Request page (As a Final HR Approver)



The approval options on this page are common to all fluid approval transactions, as described in the documentation for the Pending Approvals - <Transaction Details> Page.

Field or Control	*Description*
Approve, **Deny** and **Pushback**	Use these buttons to take action on the requested approval. • Approve: Once the final approver approves a personnel action request employee's job records are updated. • Deny: Once the approver denies a personnel action request the process ends. • Pushback: Once the approver pushes back the request it goes back to the originator/requester.
Effective Date	Displays the effective date for the transaction (not the date that the transaction was submitted).

Field or Control	***Description***
Action	Displays the action for which the Personnel Action Request is raised.
Action Reason	Displays the action reason specified in the Personnel Action Request.
Nature of Action Code	Displays the Nature of Action code corresponding to the action as specified in PAR.
Employee Status and **Approval Status**	Displays the status of the employee and the status of the approval request.

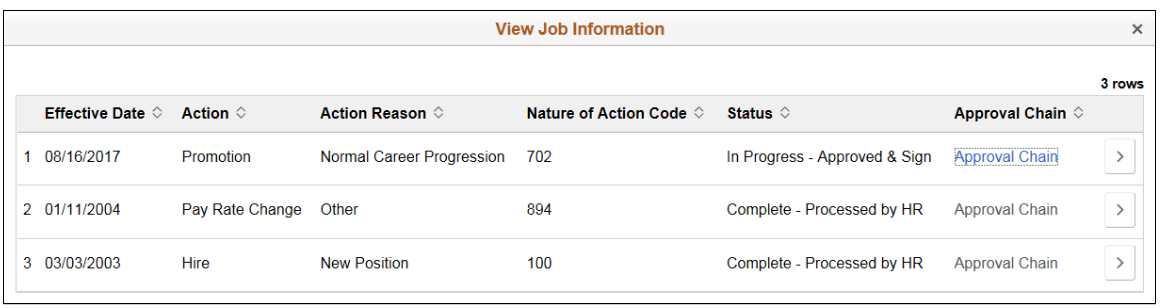
Summary of Changes

This section show the proposed changes to the employee's record. The grid lists the specific data changes that are being requested and the existing data.

View Job Information

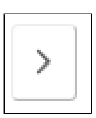
Click the View Job Information link to open the Job Information Page. You can view the details such as Action, Action Reason, Nature of Action Code, Status of the request, and Approval Chain details.

This example illustrates the View Job Information page


View Job Information

3 rows

	Effective Date	Action	Action Reason	Nature of Action Code	Status	Approval Chain	
1	08/16/2017	Promotion	Normal Career Progression	702	In Progress - Approved & Sign	Approval Chain	>
2	01/11/2004	Pay Rate Change	Other	894	Complete - Processed by HR	Approval Chain	>
3	03/03/2003	Hire	New Position	100	Complete - Processed by HR	Approval Chain	>

Field or Control	***Description***
	Click this icon to view PAR transaction details. The data from Create Personnel Action Page is displayed here with the changes highlighted.

View Edit Errors

Click the View Edit Errors link to view the errors that are generated. The result on this page is based on the validation process that is run while creating PAR.

Edit Details

Click the Edit Details link to open the Create PAR page and make required changes.

Note: This link is available only for Final HR Approver.

CI Exceptions

When the Final HR Approver click the Approve button, system saves the changes and updates all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates.

Use the CI Exceptions link to view the warning/error messages generated while CI Interface is used. If the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error.

Note: This link is available only for Final HR Approver.

Approver Comments and Approval Chain Sections

Field or Control	***Description***
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this link to open the Approval Chain page, where you can review information about all approvers for the transaction

Approving Transaction as a Position Administrator

Using the PeopleSoft Fluid User Interface, a Position Administrator can be added as an approver for approving a Personnel Action Request.

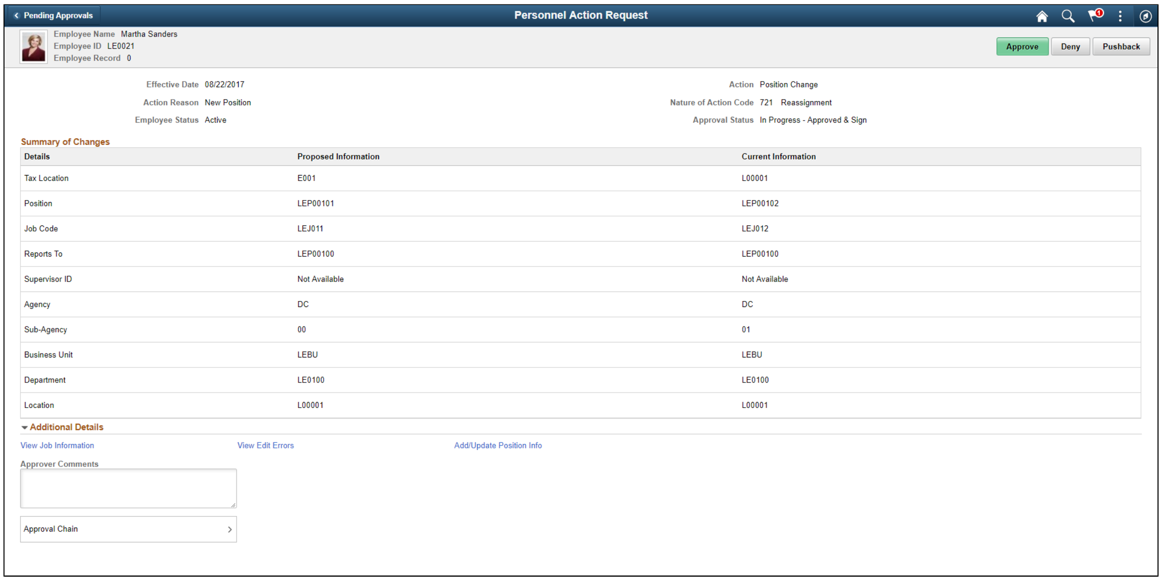
While configuring a nature of action, a Federal HR Administrator can configure whether the PAR for that action requires approval from Position Administrator.

For more information on configuring NOA codes, see “Nature of Actions USF Page” (Application Fundamentals)

On submitting such PAR for approval, the position administrator will be able to view the approval request in his/her Pending Approvals page.

Note: It is up to the PAR Administrator to decide if position administrator's approval is required for a specific action request.

This example illustrates the Personnel Action Request page for a Position Administrator.



Field or Control	***Description***
View Job Information	Click the View Job Information link to open the Job Information Page. You can view the details such as Action, Action Reason, Nature of Action Code, Status of the request, and Approval Chain details.
View Edit Errors	Click the View Edit Errors link to view the errors that are generated. The result on this page is based on the validation process that is run while creating PAR.
Add/Update Position Info	As a position administrator, you can use the link to access the Add/Update Position Info component, make necessary position related changes, save and approve the PAR. For more information, see“Updating Position Data” (PeopleSoft Human Resources Manage Positions)
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this link to open the Approval Chain page, where you can review information about all approvers for the transaction

Understanding Route to Next Feature

Once a PAR request is submitted, the request is routed to the approval queue. There can be multiple Approvers for reviewing and approving a PAR request. PAR Administrators can also configure users as 1st approver, 2nd approver, and so on, based on their business requirements. When one level of approval process is complete, system automatically routes the request to the next level.

As an administrator, you can opt not to automatically route the request to next approver and give the approver the option to select the next level approver.

This topic discuss on how to enable Route to Next feature using Fluid Approvals.

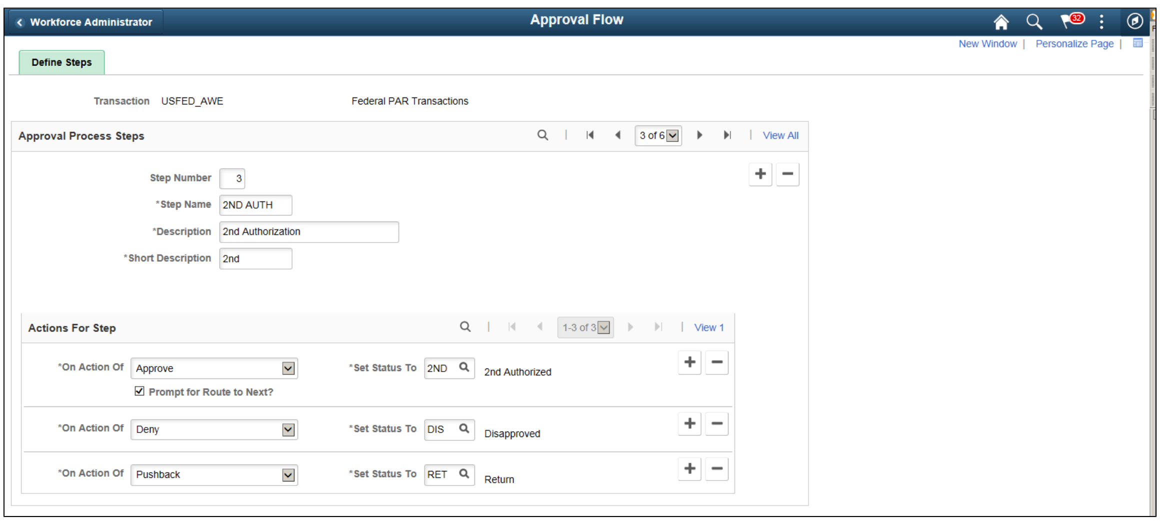
Approval Flow (USF) Page

Use the Approval Flow (USF) page (GVT_WIP_ACTVTY4) to associate WIP statuses with steps in the approval process for federal self-service transactions. You can also enable Route to Next feature using this page.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data USF** > **Approval Flow Setup USF**

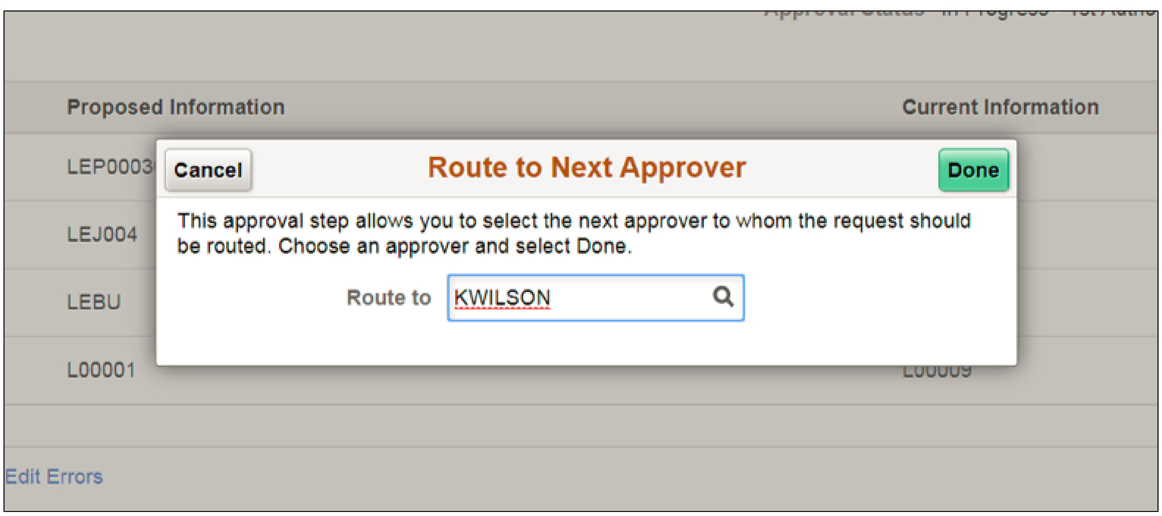
This example illustrates the fields and controls on the Approval Flow (USF) page.



Field or Control	***Description***
Step Number	Enter a number that identifies the order that the approval process will follow. The numbering of the approval steps must be sequential and begin with the number 1. Step 1 must represent the initial request, and subsequent steps must represent the approval steps as defined in the Approval Framework.
Step Name, **Description** and **Short Description**	Enter a name for this approval step and appropriate descriptions.

Field or Control	***Description***
On Action Of	Add or modify the action for which you are defining a WIP status. Valid actions are: • Approve • Deny • Request • Pushback
Set Status To	Select the WIP status to assign to the transaction when the selected action takes place. Options in the field include all the delivered Work-in-Progress (WIP) status types.
Prompts for Route to Next	Select this check box if you want to allow the approver to specify the next level approver, rather than automatic routing. For a example, select the **Prompts for Route to Next** check box for the**Approve** action, with the WIP status as **Second Authorizer**. In this transaction, when the second authorizer completes and submits the approval request, he/she will be prompted to select the next level Approver.

This example illustrates the Route to Next Approver page.



Field or Control	***Description***
Route to	Select the next level approver. The data is routed to the selected employee for approval. Look up options are listed based on the approval user list defined for the next level.

Note: To use this functionality, no changes to Approval Flow configuration is required.

Canceling or Correcting a Personnel Action Request Using Fluid

An HR user can correct or cancel a PAR request using the fluid user interface. This section describes how to correct/cancel a PAR request.

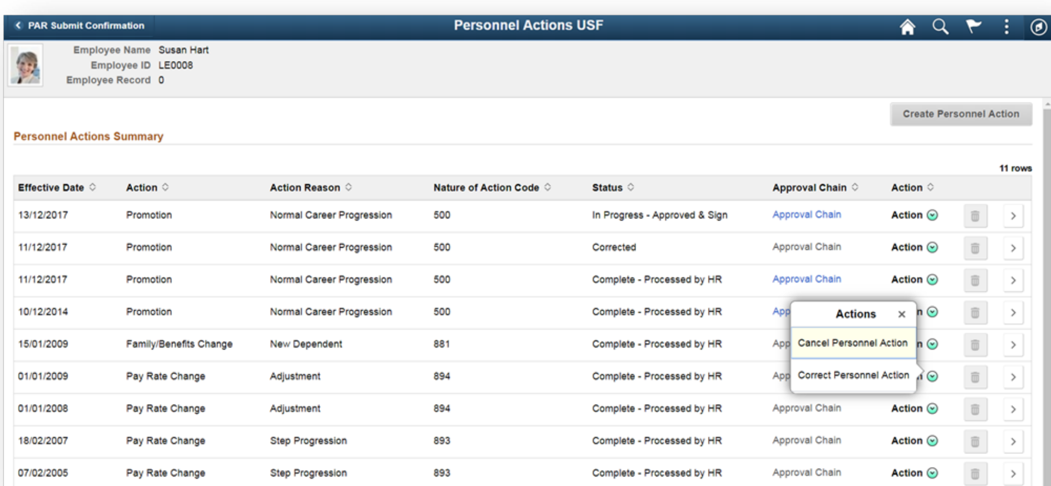
Only users with the following user roles may perform a correction or cancellation:

- For PAR Correction — Federal PAR Correction User
- For PAR Cancellation — Federal PAR Cancellation User

To access a processed request that you want to correct/cancel:

- Click the Personnel Actions USF' tile.
- Access the Personnel Actions USF page of the employee.
- Click the Related Actions button in 'Actions' field.
- Select Cancel Personnel Action or Correct Personnel Action based on your requirement.

This example illustrates Personnel Actions USF page when Actions button is selected



Note: Only processed rows are available for correction or cancellation. When a correction is in progress another correction cannot be made on the same personnel action row. The related action button for such PAR rows show "No actions available" message.

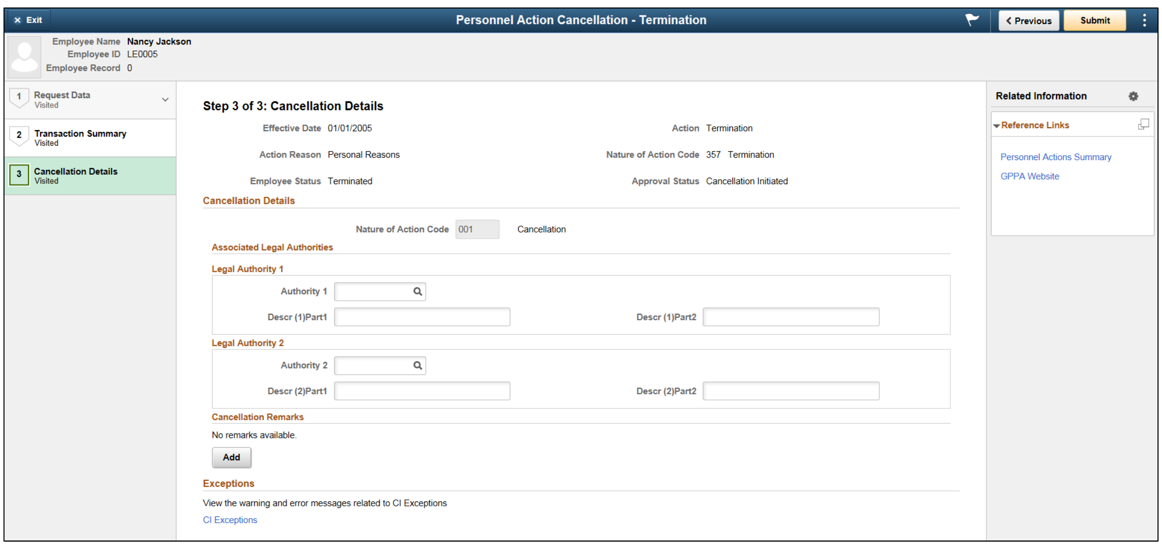
For more information on the fields and controls in Personnel Actions USF page, see Personnel Actions USF Page

Canceling a PAR

Consider a scenario where the HR user had selected Cancel Personnel Action from the related actions.

On selecting the Cancel Personnel Action related action, Personnel Actions USF pages appear within the context of a PeopleTools Activity Guide with Cancellation Details page.

This example illustrates the Cancellation Details page.



For more information on Activity Guide Framework for Creating and Viewing Personnel Actions, see Create/View Personnel Actions Activity Guide Framework

Note: In the cancellation mode, the steps in the Request Data section will be read only and you won't be able to make any changes to the PAR.

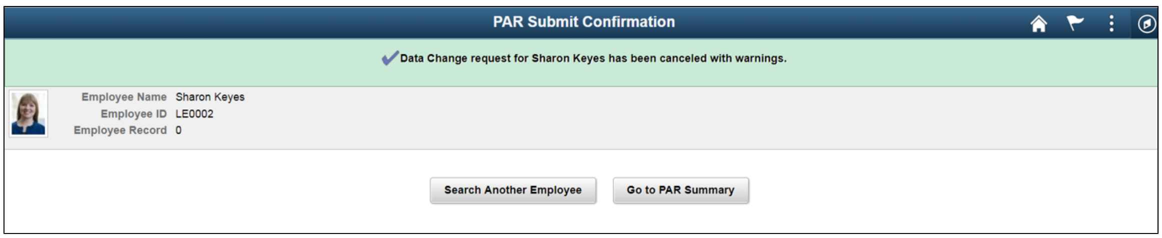
Term	*Definition*
Authority 1 and **Authority 2**	Select the applicable legal authority code. **Note:** At least one legal authority should be selected to submit the cancellation request.
Remark CD	Select the appropriate remark code.
Insertion Required	Select the check box if this remark needs to be inserted in standard forms.

Term	***Definition***
Remark Description	Based on the selected remark code, description is populated.
CI Exceptions	Click the link to view the warning and error messages related to CI Exceptions.

Click Submit to complete the cancellation process.

If there is any warning related to CI exceptions, it will be indicated along with the confirmation message.

This example illustrates the Confirmation page when Cancel Personnel Action Request is submitted with warnings.



You can navigate to the Cancellation Details page and click the CI Exceptions link to view the warnings.

When you perform a PAR Cancellation transaction, Cancellation Details is the only step in the Activity Guide that is mandatory to complete. Based on the requirement, you can hide or unhide the remaining steps using Page and Field Configurator. For more details, see “Using Page and Field Configurator” (Enterprise Components)

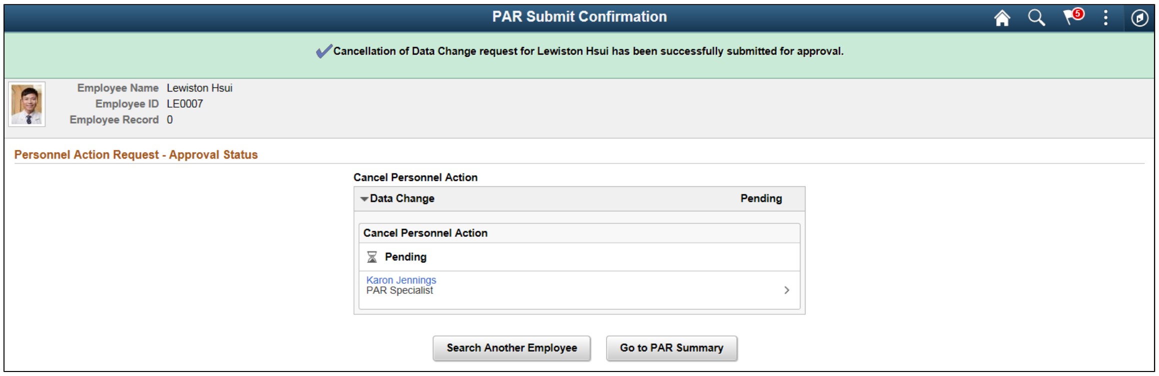
Note: Oracle recommends the users to enable Data Control step, Transaction Summary step and Cancellation Details step.

Canceling a PAR with Approvals

If the Approvals is enabled, on submitting the cancellation request, the request will be routed for approval. For more information on enabling Approvals, see Enabling Approvals for Canceling/Correcting a PAR

You can view the Approver details and the status of the transaction in the PAR Submit Confirmation page.

This example illustrates the PAR Submit Confirmation page when *Approvals* is enabled for Correction Request.

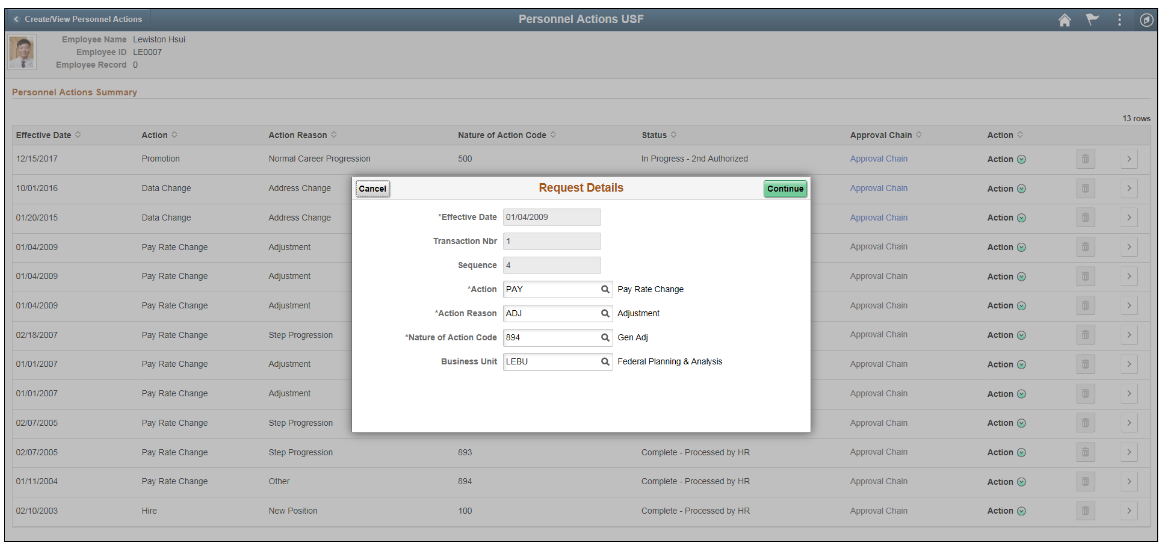


Correcting a PAR

Consider a scenario where the HR user had selected Correct Personnel Action from the related actions.

On selecting the Correct Personnel Action related action, Request Details page is displayed.

This example illustrates the Request Details Page when Correct Personnel Actions is selected.

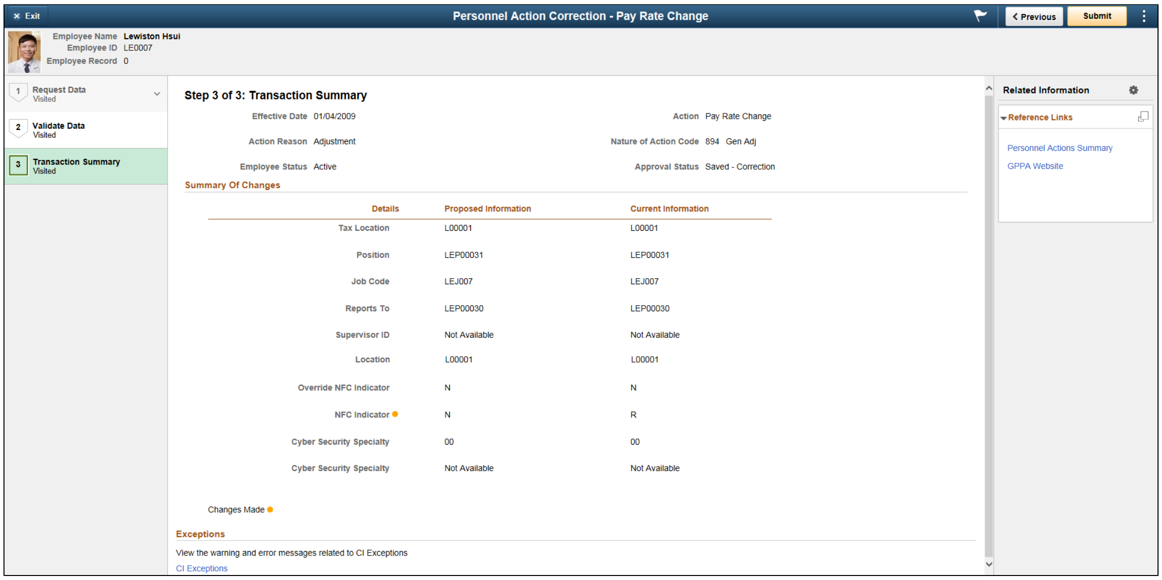


You can edit the fields such as Action Reason, Nature of Action Code and Business Unit.

Click Continue. This opens the Create/View Personnel Actions pages in the context of a PeopleTools Activity Guide. Once you have made the required changes submit the Correction request using the Transaction Summary page.

Note: All the fields in this page are pre configured in the transaction summary set up page for the mentioned Nature of Action Code.

This example illustrates the Transaction Summary page when Correct Personnel Action is selected.



Click the CI Exceptions link to view the warning and error messages related to CI Exceptions.

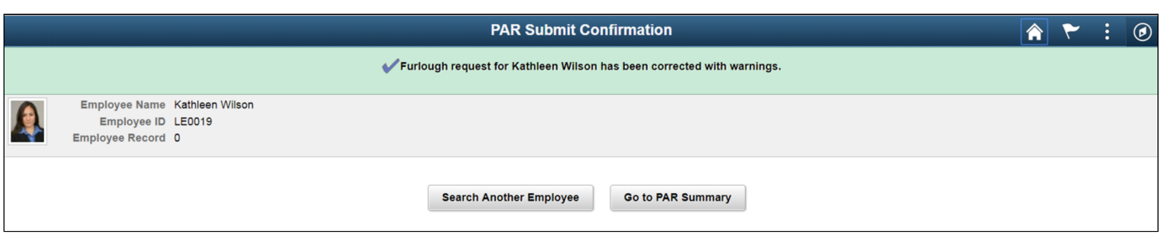
Once done, click Submit.

Note: If there are any CI Exception *Errors*, your request will NOT be submitted. If there are only CI Exception *Warnings*, then your request will get submitted.

This example illustrates the Confirmation page when Correct Personnel Action Request is submitted.

If there is any warning related to CI exceptions, it will be indicated along with the confirmation message.

This example illustrates the Confirmation page when Correct Personnel Action Request is submitted with warnings.



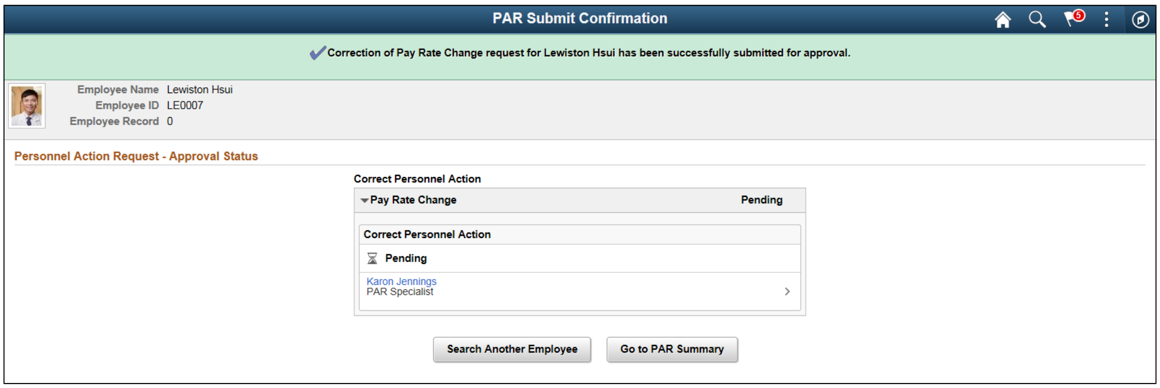
You can navigate to the Transaction Summary page and click the CI Exceptions link to view the warnings.

Correcting a PAR with Approvals

If Approvals is enabled for Correction action, on submitting the Correction request, the request will be routed for approval. For more information on how to enable Approvals, see Enabling Approvals for Canceling/Correcting a PAR

You can view the Approver details and the status of the transaction in the PAR Submit Confirmation page.

This example illustrates the PAR Submit Confirmation page when *Approvals* is enabled.



Chapter 30

(USF) Processing Automatic Actions for Probation, Tenure, and WGIs

Understanding Automatic Action Processing

This topic lists prerequisites and provides an overview of processing automatic actions.

Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using one of the components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 48 or later must use Notification Composer.
For more information about Notification Composer Framework, see "Understanding Notification Composer" (Enterprise Components).

Related Links

"General Workflow Information" (Application Fundamentals)

Adding an Employment Instance

Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft HCM USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- WGIs.

If you activate workflow, PeopleSoft Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

   The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

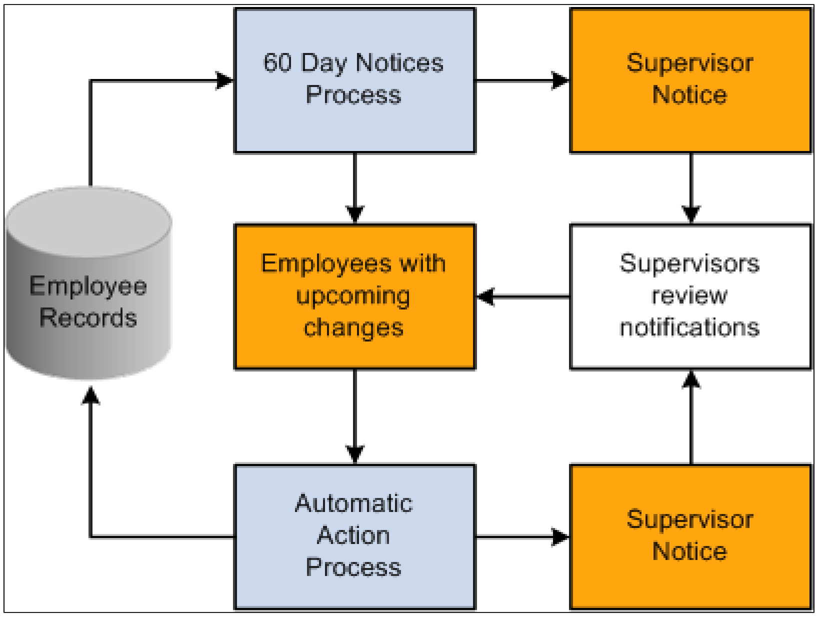
2. Review online notifications and make any necessary changes to employee records.

   Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records.

   This process also creates notices and sends them to supervisor worklists.

The following diagram illustrates automatic action processing, including the creation of advance supervisor notification, the automated updates to employee data, and the supervisor notifications that the updates have been completed:



Performing Automatic Actions

To set up Automatic Action messages, use the Automatic Action Msgs (GVT_AUTOACTNMSG_TB) component.

These topics provide an overview of the menus, list pages used for each Automatic Action process, and discuss how to perform automatic actions.

Pages Used to Perform Automatic Actions

Page Name	***Definition Name***	***Usage***
Automatic Action Messages Page	GVT_AUTOACTMSG_TBL	Define Automatic Action messages.
Process Automated Actions USF Page	RUNCTL_AUTO_ACTNS	Specify automatic action run control parameters for the probation termination and tenure conversion processes.
Process WGI Auto Action USF Page	RUN_FGHR002B	Specify automatic action run control parameters for processing WGIs.
Probation Notifications USF	GVT_PROB_END_NOTE	View impending probationary period termination notifications online.

Page Name	Definition Name	Usage
Tenure Conversion Notice USF Page	GVT_TEN_END_NOTICE	View 60-day tenure notifications online.
Within Grade Incr Notice USF Page	GVT_WGI_NOTICE	View impending WGI notifications online.

Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

Step	Function	Navigation	Option to select in PeopleSoft Process Scheduler	Process Type and Name
1	Identify employees, create notices, and send notices to supervisor worklists.	Process Automated Actions USF	60 Day Probation Term Notices	Application Engine FGHR003A
			Or 60 Day Tenure Notices	Application Engine FGHR004A
			Or 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process Automated Actions USF	Process Probation Terminations	Application Engine FGHR003B
			Or Process Tenure Conversions	Application Engine FGHR004B
		Or Process WGI Auto Action USF	Load Within Grade Increases	Application Engine FGHR002B

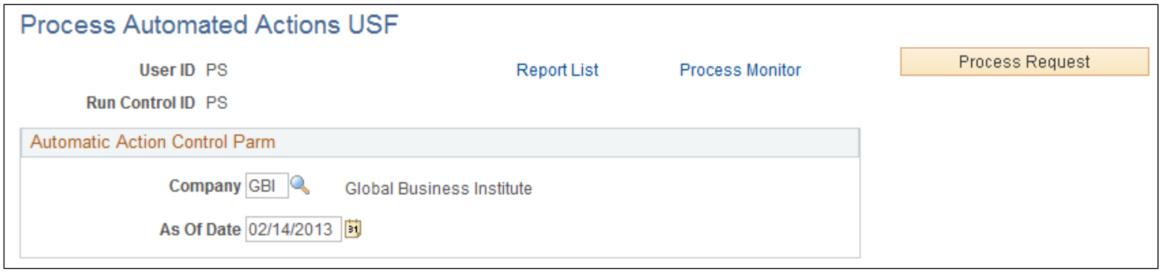
Process Automated Actions USF Page

Use the Process Automated Actions USF page (RUNCTL_AUTO_ACTNS) to specify automatic action run control parameters for the probation termination and tenure conversion processes.

Navigation:

Workforce Administration > **Collective Processes** > **Process Automated Actions USF** > **Process Automated Actions USF**

This example illustrates the fields and controls on the Process Automated Actions USF page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Company	Enter the company for which you would like to identify employees and create notifications.
As Of Date	The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.
Process Request	Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See the product documentation for

PeopleTools: Process Scheduler

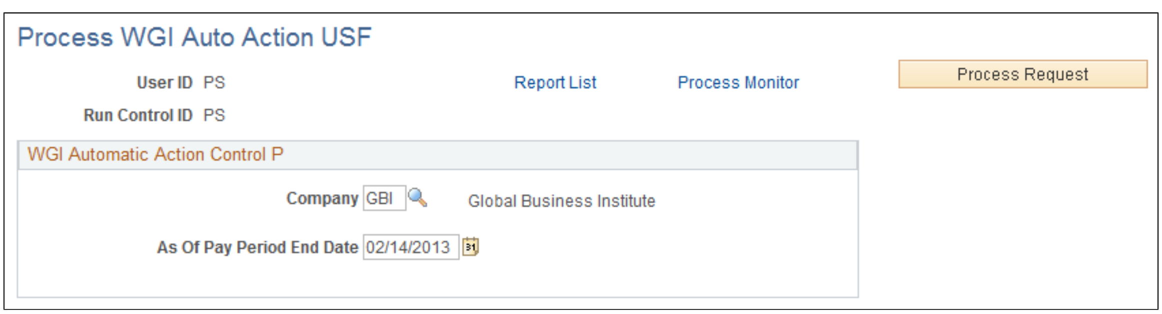
Process WGI Auto Action USF Page

Use the Process WGI Auto Action USF page (RUN_FGHR002B) to specify automatic action run control parameters for processing WGIs.

Navigation:

Workforce Administration > **Collective Processes** > **Process WGI Auto Action USF** > **Process WGI Auto Action USF**

This example illustrates the fields and controls on the Process WGI Auto Action USF. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Company	Enter the company for which you would like to process WGIs.
As Of Pay Period End Date	This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The probation termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This topic discusses how to run the probation termination automatic action.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.

    a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

        If the employee has multiple data rows, verify only the current row.

    b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non - Pay Data page.

2. Run the 60 Day Probation Term Notices process from the Process Automated Actions USF page.

    During this process, the system performs the following functions:

    - Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.

- Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date.

  The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Probation Terminations process from the Process Automated Actions USF page.

   The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed.

     This row was created during the 60-Day Probation Term Notices process.

   - Deselects the probation date on the employee's current Employment 2 page.
   - Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

   Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

Related Links

Assigning Employees to Positions
Adding an Employment Instance

Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The tenure conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This topic discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing.
   a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.
   b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non - Pay Data page.
2. Run the 60 Day Tenure Notices process from the Process Automated Actions USF page.

   During this process, the system:

   - Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications.

     After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.
   - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

     This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Tenure Conversions process from the Process Automated Actions USF page.

   In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed.

     This row was created during the 60-Day Tenure Notices process.

- Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.
- Creates a supervisor notice indicating that the tenure conversion was processed.

4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).

   Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

Related Links

Assigning Employees to Positions

Adding an Employment Instance

Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

Effective Date	***NOA***	***Conv Begin Date***	***Career Conv Date***	***Career-Cond Conv Date***	***Tenure***
January 1, 1999 = old Career Conv Date	880 = Change in Tenure Status				Permanent
January 1, 1996 = old Career-Cond Conv Date	880 = Change in Tenure Status	January 1, 1996 = current effective date	January 1, 1999 = Conv Begin Date + 3 years		Conditional
January 1, 1994	101 = Career Conditional Appointment	January 1, 1994		January 1, 1996	None

As the table demonstrates, the system inserts a row with an effective date equivalent to the career conversion date or career-conditional conversion date and a nature of action code *880.*

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.

- Inserts a career conversion date three years in the future.

  You can change this date.

- Changes the tenure type from *None* to *Conditional.*

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.
- Changes the tenure type from *Conditional* to *Permanent.*

Administering WGIs

Keeping track of WGIs for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

These topics provide an overview of 60 day WGI notices and of the load within grade increases process and discuss:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

Automatic Action Type	***Explanation***
Within Grade Increase	These employees receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI status of *Waiting,* but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an overall review rating below *Satisfactory* or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes WGIs automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	***NOA***	***Step***	***WGI Due Date***	***WGI Status***	***Last Increase Date***	***LEI Date***
January 1, 2001	Any	1	May 18, 2001	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	***NOA***	***Step***	***WGI Due Date***	***WGI Status***	***Last Increase Date***	***LEI Date***
May 18, 2001 = old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	May 18, 2001 =old WGI due date	May 18, 2001 =old WGI due date
January 1, 2001	Any	1	May 18, 2001	Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred.

  If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created.* Only the system enters a status of *Created.*

- Inserts a new row with nature of action code *893* and effective date equal to the old WGI due date.
- Increments the step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI due date for the new row.

  This date corresponds to the beginning of the pay period following the waiting period for the new step.

- Sets the WGI status on the new row to *Waiting.*
- Sets both the last increase date and LEI date on the new row to the old WGI due date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

   To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

   a. Selected the **Pay Plan is Eligible for Auto Within Grade Increase** check box on the Pay Plan Table page.

   b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.

   c. Ensured each step has a next step increment value in the Weeks column on the Salary Step Table page.

   d. Set the overall review rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.

   e. Selected a work schedule of *Full Time, Baylor Plan,* or *Part Time* on the Position Data page.

   f. Set WGI status to *Waiting* or *Approved* on the Employment 1 page.

   g. Ensured that the **Reports To Position** field contains a valid entry on the Employment 2 page.

   h. Verified that the step isn't the highest in grade on the Compensation Data page.

   Note: If you are using the Manage Positions business process, the **Report To Position** field on the Employment 2 page is unavailable for data entry. To edit the field, select the **Position Override** check box on the Position Data page and change the position this employee reports to. You can also identify the reports to position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

2. Run the 60 Day WGI Notices process from the Process Automated Actions USF page.

   This process identifies employees with a WGI due date within the next 60 days and a WGI status of *Waiting* or *Approved.* The system:

- Adds a row to the automatic action control table (GVT_AUTO_ACTN).

  This table records the employee ID, employee record number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

- Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications.

  After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI status to *Denied, Postponed,* or *N/A* on the current row and insert a new row with the new WGI due date and WGI status of *Waiting* or *Approved.* The system also creates notices for employees who have a condition preventing automatic WGI processing.

- Changes the WGI status on the employees' current Employment 1 pages to *Approved,* if the employees meet all of the WGI criteria.

- Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the Process WGI Auto Action USF page.

   In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the Within Grade Incr Notice USF page.

   After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI status to *Denied, Postponed,* or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI due date and WGI status of *Waiting.* You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

Related Links

“Establishing Pay Plans” (PeopleSoft Payroll for North America)

“Creating Pay Calendars and FLSA Calendars” (Application Fundamentals)

“Setting Up Salary Plans, Grades, and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

Understanding U.S. Federal Hiring

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade.

When you create a PAR with nature of action code *713,* the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI due date.

  When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period.

  You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows.

  When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI status of *Waiting.* You probably do not want the system to process this row in an automatic WGI and should change the WGI status to *N/A.* Depending on the nature of action, you might need to check other information, for example step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI due date.

  The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

- If a user creates a manual WGI (NOA = 893) PAR row, any preceding rows that have a WGI status of *Waiting* or *Approved* are updated to a status of *Manual* to indicate that a manual WGI has been inserted.

Chapter 31

(USF) Managing Leave

Understanding Leave Administration

These topics list prerequisites and discuss:

- Automatic leave enrollment administration.
- Leave transfer management.

Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

Related Links

"Understanding Earnings Tables" (PeopleSoft Payroll for North America)

Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time set up).
2. Set up Leave Class Rule criteria (one-time set up).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.
5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Term	*Definition*
Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.
Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Administering Automatic Leave Enrollment

To set up leave class rules, use the Leave Class Rules Criteria USF (GVT_LVCLSRUL_TMPLT) and Leave Class Rules USF (GVT_LV_CLS_RULES) components.

These topics discuss how to administer automatic leave enrollment.

Pages Used to Administer Automatic Leave Enrollment

Page Name	*Definition Name*	*Usage*
Leave Class Rules Criteria USF Page	GVT_LVCLSRUL_TMPLT	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules USF Page	GVT_LV_CLS_RULES	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment Page	RUNCTL_FGASOFDT	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Track Auto Leave Enrollment Page	GVT_LVCLS_TRGR	Review the results of the Leave Class Auto Enrollment process.

Page Name	Definition Name	Usage
Employee Accruals Enrollment Page	GVT_ACCR_PLAN	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

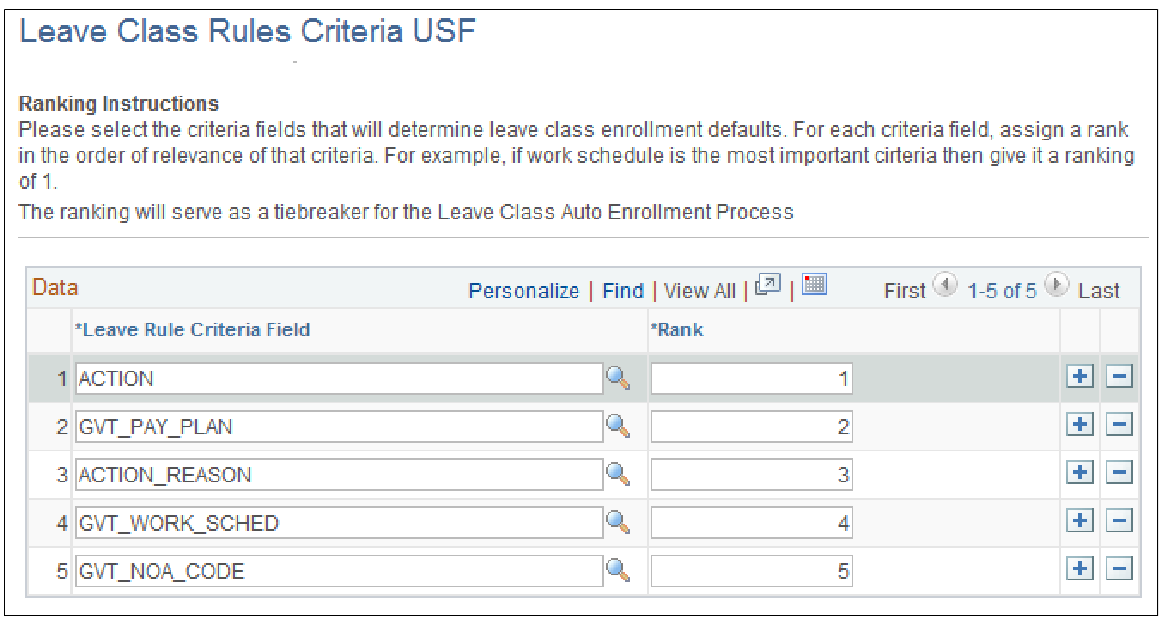
Leave Class Rules Criteria USF Page

Use the Leave Class Rules Criteria USF page (GVT_LVCLSRUL_TMPLT) to rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Absence** > **Leave Class Rules Criteria USF** > **Leave Class Rules Criteria USF**

This example illustrates the fields and controls on the Leave Class Rules Criteria USF page. You can find definitions for the fields and controls later on this page.



Set up the Leave Class Rules template only once.

Field or Control	Description
Leave Rule Criteria Field	Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are: *ACTION:* action *ACTION_REASON*: action/reason. *GVT_NOA_CODE*: nature of action code. *GVT_PAY_PLAN*: pay plan. *GVT_TYPE_OF_APPT*: type of appointment. *GVT_WORK_SCHED*: work schedule.
Rank	Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

Rule 1 Definitions	Rule 2 Definitions
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	PAR Criteria: Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	Default Enrollments: Annual Leave Sick Leave Home Leave

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.

- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

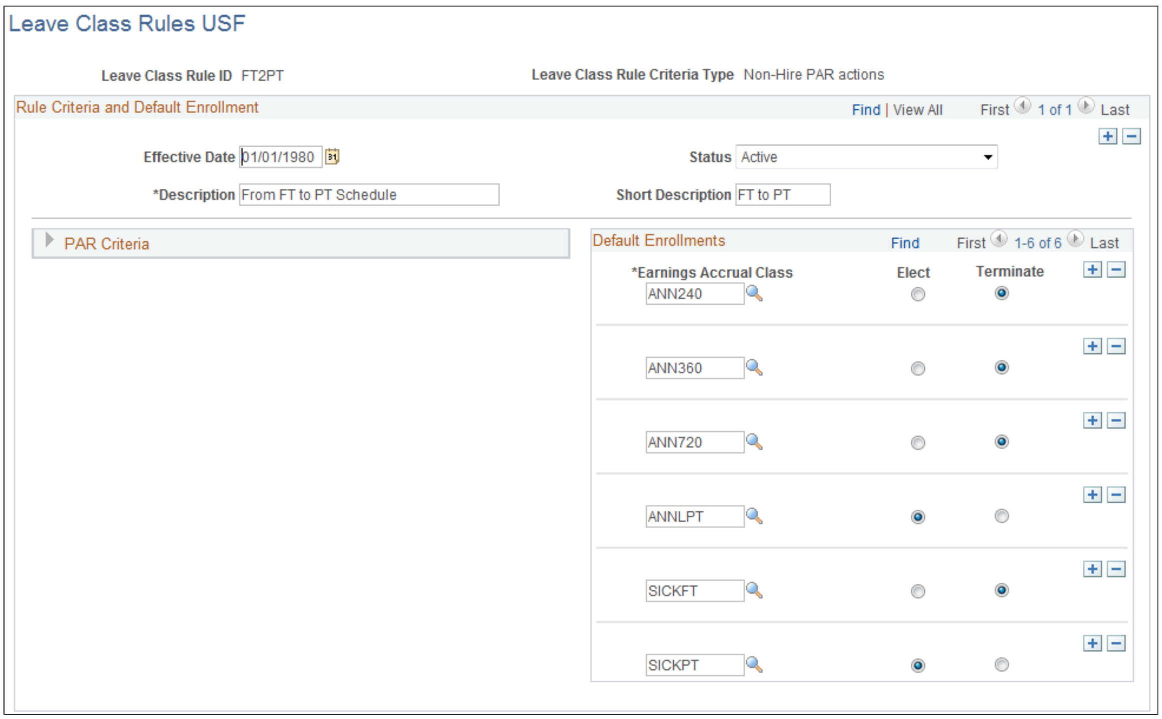
Leave Class Rules USF Page

Use the Leave Class Rules USF page (GVT_LV_CLS_RULES) to define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Absence** > **Leave Class Rules USF** > **Leave Class Rules USF**

This example illustrates the fields and controls on the Leave Class Rules USF page. You can find definitions for the fields and controls later on this page.



Note: You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Payroll for North America no longer process that employee.

Field or Control	***Description***
Leave Class Rule ID	Identify each leave class rule you create.

Field or Control	***Description***
Leave Class Rule Criteria Type	Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are: *Hire/Rehire:* for rules associated with hire or rehire actions. *Leave Program Status:* for rules associated with leave bank and transfer processing. *Non-Hire PAR actions:* for rules associated with PAR actions that are not hire or rehire.

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

Leave Class Rule Criteria Type	***Group Boxes***
Hire/Rehire or *Non-Hire PAR actions*	PAR Criteria Default Enrollments
Leave Program Status	Leave Program Default Enrollments

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Field or Control	***Description***
Earnings Accrual Class	Select the earnings accrual classes that apply to this rule.
Elect	Select to enroll employees in the earnings accrual class by this rule's criteria.
Terminate	Select to terminate employees from the earnings accrual class by this rule's criteria.

Leave Program

Field or Control	*Description*
Leave Program Type	If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program *Bank, Emergency,* or *Voluntary.*

Related Links

"Defining Earnings Accrual Classes" (PeopleSoft Payroll for North America)

Administering Leave Donations

Automatic Leave Enrollment Page

Use the Automatic Leave Enrollment page (RUNCTL_FGASOFDT) to run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Request Auto Leave Enrollment** > **Automatic Leave Enrollment**

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page. The *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

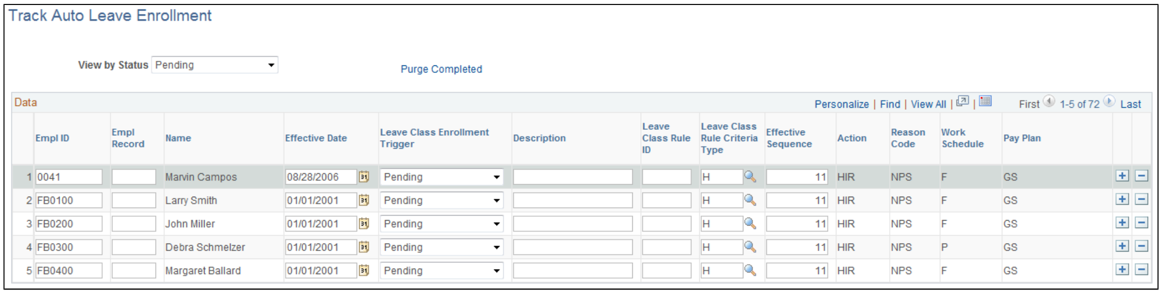
Track Auto Leave Enrollment Page

Use the Track Auto Leave Enrollment page (GVT_LVCLS_TRGR) to review the results of the Leave Class Auto Enrollment process.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Track Auto Leave Enrollment** > **Track Auto Leave Enrollment**

This example illustrates the fields and controls on the Track Auto Leave Enrollment page. You can find definitions for the fields and controls later on this page.



Note: Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

Field or Control	***Description***
View by Status	Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed, Error,* or *Pending.* The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program. The status changes to *Completed* when the auto enrollment process is complete.
Purge Completed	Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed.*

Employee Accruals Enrollment Page

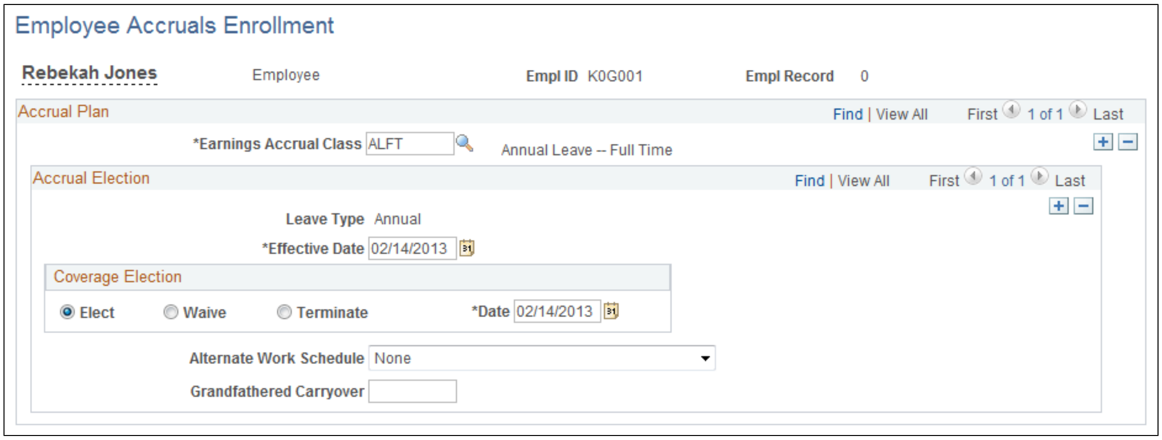
Use the Employee Accruals Enrollment page (GVT_ACCR_PLAN) to adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment.

If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Employee Accruals Enrollment** > **Employee Accruals Enrollment**

This example illustrates the fields and controls on the Employee Accruals Enrollment page. You can find definitions for the fields and controls later on this page.



Accrual Plan

Field or Control	***Description***
Earnings Accrual Class	Select an earnings accruals class. The classes you created on the Earnings Accruals Class table are displayed.

Accrual Election

Field or Control	***Description***
Leave Type	The leave type defaults from the accrual calculation box on the Earnings Accruals – Class Page.
Election	Select the enrollment status. Select *Elect* to enroll the employee in a class. Select *Waive* to waive a leave just like a regular benefit. Select *Terminate* to end the employee's enrollment in a class.
Elect Date	Enter the date on which the accrual election change occurs.
Effective Date	Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class.

Field or Control	*Description*
Alternate Work Schedule	The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.
Grandfathered Carryover	Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover*.

Related Links

"Defining Earnings Accrual Classes" (PeopleSoft Payroll for North America)

Setting Up Leave Transfer Programs

To set up leave transfer programs, use the Leave Denial Codes USF (GVT_DENIAL_CD_TBL), Leave Program Type Table (GVT_LV_XFR_TYP_TBL), Leave Bank Details (GVT_LV_BANKMEM_SEC), and Emergency Leave Transfer Details (GVT_LV_DON_TGT_SEC) components.

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

These topics discuss how to set up leave transfer programs.

Pages Used to Set Up Leave Transfers

Page Name	*Definition Name*	*Usage*
Leave Denial Codes USF Page	GVT_DENIAL_CD_TBL	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type Table Page	GVT_LV_XFR_TYP_TBL	Set up leave transfer programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details Page	GVT_LV_BANKMEM_SEC	Enter Leave Bank board members.

Page Name	***Definition Name***	***Usage***
Emergency Leave Transfer Details Page	GVT_LV_DON_TGT_SEC	Enter the number of donation hours targeted.
Leave Class Rules USF Page	GVT_LV_CLS_RULES	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

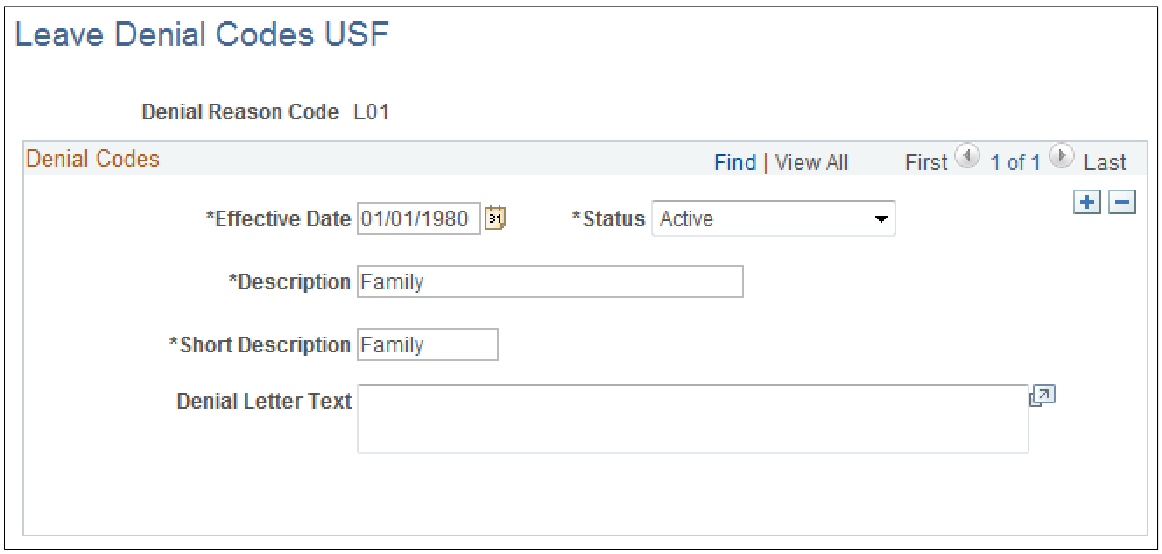
Leave Denial Codes USF Page

Use the Leave Denial Codes USF page (GVT_DENIAL_CD_TBL) to set up denial reasons and specify the text to be printed in denial notifications.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Absence** > **Leave Denial Codes USF** > **Leave Denial Codes USF**

This example illustrates the fields and controls on the Leave Denial Codes USF page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Denial Letter Text	Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031).

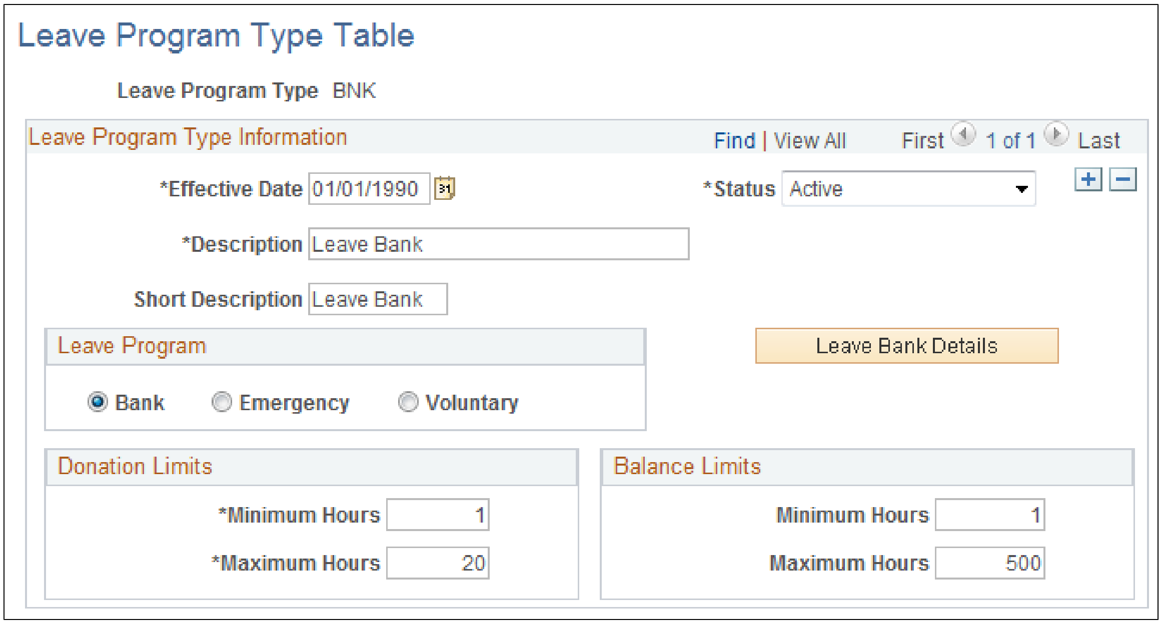
Leave Program Type Table Page

Use the Leave Program Type Table page (GVT_LV_XFR_TYP_TBL) to set up leave transfer programs, specify the program type, and indicate limits on donations and balances.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Absence > Leave Program Type Table > Leave Program Type Table

This example illustrates the fields and controls on the Leave Program Type Table page. You can find definitions for the fields and controls later on this page.



Leave Program Type Information

Field or Control	***Description***
Leave Program Type	Define your leave program codes.
Leave Program	Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.
Donation Limits and **Balance Limits**	Enter the **Minimum Hours** and **Maximum Hours** allowable for donations and balances.
Leave Bank Details	Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives. If you select *Bank* in the **Leave Program** group box, the system adds the **Leave Bank Details** button to the page when you save.
Emergency Leave Transfer Dtl (emergency leave transfer details)	Click to access the Emergency Leave Transfer Details page and record the number of donation target hours. If the Leave Program Type is *Emergency,* the system adds the **Emergency Leave Transfer Details** button to the page when you save.

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	***Leave Bank and Transfer Process***	***Earning Accrual Process***
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Leave Bank Application/Donate page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Leave Bank Application/Donate page to enter requests. Updates the Leave Bank Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Donor Contribution page to enter requests. Updates the Track Leave Donation page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD

Leave Earn Type	***Leave Bank and Transfer Process***	***Earning Accrual Process***
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Create Leave Recipient App page to enter requests. Updates Leave Bank Ledgers with hours withdrawn.	Leave Program Recipient: Increase Balance YTD
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Create Leave Recipient App page to enter requests.	Leave Program Recipient: Increase Balance YTD

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.* Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances.*
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.*
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

Related Links

"Understanding Earnings Tables" (PeopleSoft Payroll for North America)

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient.

  Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick Leave.

  When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

  Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave.

  All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- Class page: In the Leave Type field, select *Leave Program.*
- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

  For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned.*

  For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken.*

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- Class page: In the Leave Type field, select *Deferred Annual.*

- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

Related Links

“Defining Earnings Accrual Classes” (PeopleSoft Payroll for North America)

Leave Class Rules USF Page

Use the Leave Class Rules USF page (GVT_LV_CLS_RULES) to define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Absence > Leave Class Rules USF > Leave Class Rules USF

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

Related Links

Leave Class Rules USF Page

Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

These topics discuss how to administer leave donations.

Pages Used to Administer Leave Donations

Page Name	*Definition Name*	*Usage*
Leave Bank Application/Donate Page	GVT_LV_BANK_APP	Enter employee requests to contribute leave to a Leave Bank or ELTP.

Page Name	Definition Name	Usage
Donor Contribution Page	GVT_LV_DON_CONTRIB	Enter employee donations to the VLTP.
External Leave Donations Page	GVT_LV_DON_EXT	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank / Transfer Page	RUNCTL_FGPY022	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

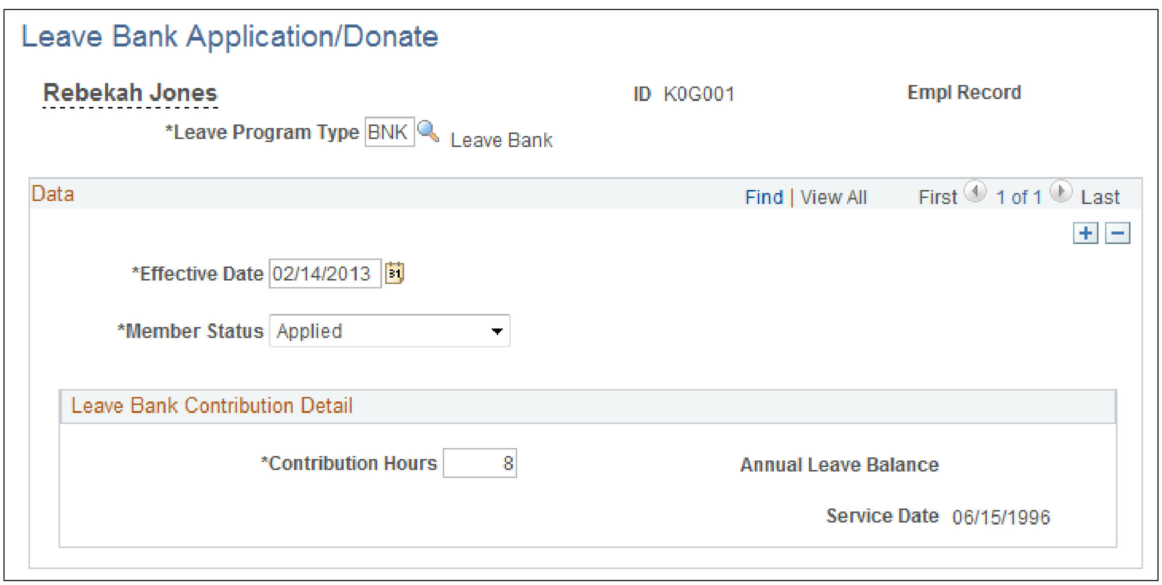
Leave Bank Application/Donate Page

Use the Leave Bank Application/Donate page (GVT_LV_BANK_APP) to enter employee requests to contribute leave to a Leave Bank or ELTP.

Navigation:

Workforce Administration > **Leave Administration USF** > **Reports** > **Leave Bank and Donation Report** > **Leave Bank and Donation Report**

This example illustrates the fields and controls on the Leave Bank Application/Donate page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Leave Program Type	Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.

Field or Control	Description
Effective Date	The request date of the application.
Member Status	Select or view the member status of the leave request. Values are: *Applied:* The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance. *Approved:* The leave review board has approved the donor's leave request. The system processes only *Approved* requests. *Contribute:* The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to *Contribute*; it issues an error message if you select this value. *Cancelled:* Indicates any other reason that the request is terminated. *Denied:* The Leave Bank Board has evaluated the request and denied the donor's leave request.
Denial Reason 1 and **Denial Reason 2**	These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial.
Contribution Hours	Specify the number of hours the donor is contributing to the leave bank or ELTP.
Annual Leave Balance	Displays the number of hours of annual leave the employee has as of this request date (Effective Date).
Service Date	The basis for determining the length of service, on which the required contribution minimum is based.

Donor Contribution Page

Use the Donor Contribution page (GVT_LV_DON_CONTRIB) to enter employee donations to the VLTP.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Voluntary Donations** > **Donor Contribution**

Note: Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Recipient information is displayed at the top of the page.

Field or Control	***Description***
Effective Date	The date of the donation.

Donor Details

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The **Return to, Returned Processed,** and **Pay Period Return Date** assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

Field or Control	***Description***
Return to	Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank.* This field is informational only and used to track the return of excess leave donation hours.
Returned Processed	When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.
Pay Period Return Date	Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours.

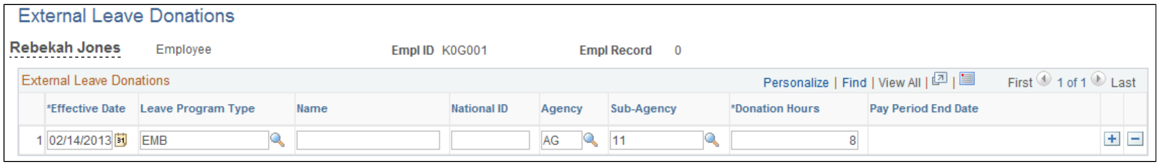
External Leave Donations Page

Use the External Leave Donations page (GVT_LV_DON_EXT) to enter employee requests to donate to another agency's leave transfer program.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **External Leave Donations** > **External Leave Donations**

This example illustrates the fields and controls on the External Leave Donations page. You can find definitions for the fields and controls later on this page.



Note: Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Process Leave Bank / Transfer Page

Use the Process Leave Bank/Transfers page (RUNCTL_FGPY022) to run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Process Leave Bank/Transfers**

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Bank Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the **As of Date** you enter on the run control page.

Related Links

“Create Additional Pay Page” (PeopleSoft Payroll for North America)

Running the Leave Bank and Transfer Process for Approved Recipients

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

These topics discuss how to:

1. Enter employee requests to receive hours from any of the leave program types.

2. Enroll recipients in the leave program accrual class.

3. Run the Leave Bank and Transfer process for approved recipients.

4. View and adjust the data entered by the Leave Bank and Transfer process.

5. View recipient accrual balances.

Page Used to Administer Leave Recipients

Page Name	***Definition Name***	***Usage***
Create Leave Recipient App Page	GVT_LV_RECIP_INFO	Enter employee requests to receive hours from any of the leave program types.

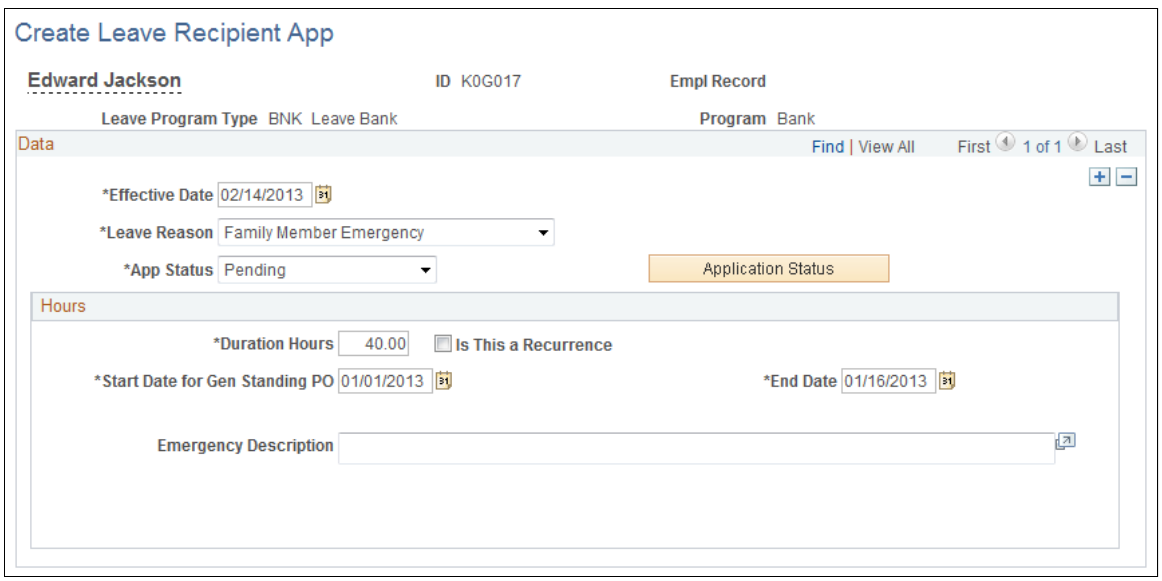
Create Leave Recipient App Page

Use the Create Leave Recipient App page (GVT_LV_RECIP_INFO) to enter employee requests to receive hours from any of the leave program types.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Create Leave Recipient App** > **Create Leave Recipient App**

This example illustrates the fields and controls on the Create Leave Recipient App page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Effective Date	Enter the date that leave program participation was requested.
Leave Reason	Select the reason for the emergency leave requested. Values are *Employee, Family,* and *Agency.*

Field or Control	*Description*
App Status (application status)	Select the status from the following values: *Pending:* The leave review board has not processed the request. *Approved:* The leave review board has approved the request. *Denied:* The leave review board has denied the request. *Separated:* The employee separated from Federal service before the originally requested end date. *Cancelled:* Any other reason that the request is not active.
Position Detail	Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.
Application Status	Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.

Hours

Field or Control	*Description*
Duration Hours	Enter the number of hours requested (to the quarter-hour).
Is This a Recurrence	Select if the reason is a recurrence.
Start Date for Gen Standing PO and**End Date**	Enter the days on which the recipient requests the leave to begin and end.
Emergency Description	Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals Enrollment page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals Enrollment page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

Related Links

Employee Accruals Enrollment Page

Running the Leave Bank and Transfer Process for Approved Recipients

Access the Process Leave Bank / Transfer Page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Bank Ledger with hours withdrawn.
- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

Viewing the Data Entered by the Leave Bank and Transfer Process

See Review Leave Bank Ledger Page.

Viewing Recipient Accrual Balances

See Viewing Donor and Recipient Accrual Summaries.

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

These topics discuss viewing leave transfer data.

Pages Used to View Leave Transfer Data

Page Name	***Definition Name***	***Usage***
Review Leave Bank Ledger Page	GVT_LV_BANK_LDGR	View and adjust leave donations to leave bank and emergency leave transfer programs.

Page Name	*Definition Name*	*Usage*
Track Leave Donation Page	GVT_LV_DON_TRACK	View leave donations to voluntary leave transfer programs.
"Accrual Summary Page" (PeopleSoft Payroll for North America)	Accrual Summary	View donor and recipient accrual balances.
"Create Additional Pay Page" (PeopleSoft Payroll for North America)	ADDITIONAL_PAY1	View hours donated or received.
Review Leave Program Summary Page	GVT_LV_PRGM_SUMM	View a summary of participation in a leave transfer program.

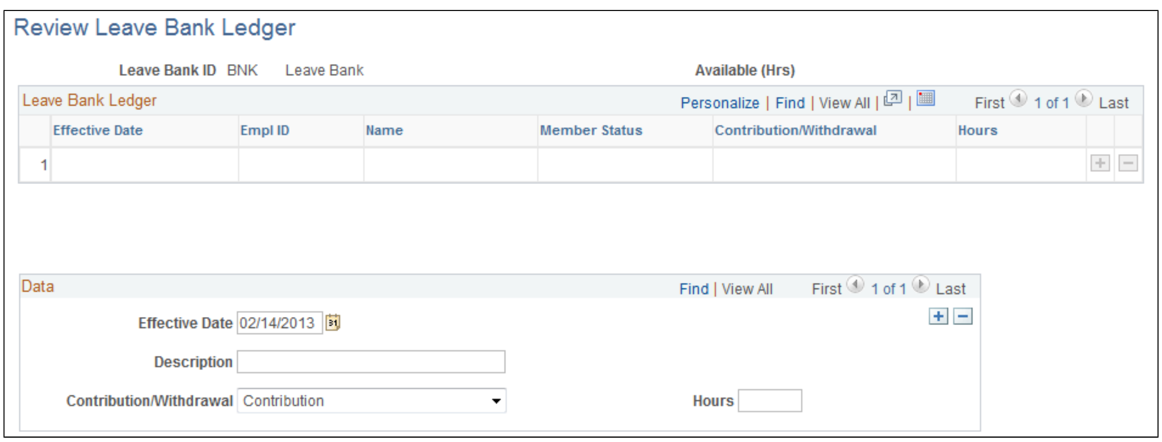
Review Leave Bank Ledger Page

Use the Review Leave Bank Ledger page (GVT_LV_BANK_LDGR) to view and adjust leave donations to leave bank and emergency leave transfer programs.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Review Leave Bank Ledger** > **Review Leave Bank Ledger**

This example illustrates the fields and controls on the Review Leave Bank Ledger page. You can find definitions for the fields and controls later on this page.



The Leave Bank Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

Field or Control	*Description*
Available (Hrs)	Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the **Contribution/Withdrawal** and **Hours** fields.

Leave Bank Ledger

Field or Control	***Description***
Effective Date	Displays the As Of Date on the Leave Bank / Transfer process run control page.
EmplID and **Name**	List of all the employees who have participated in the bank.
Member Status	Displays the member status for the transfer.
Contribution/ Withdrawal	Indicates whether each transaction is a contribution or a withdrawal.
Hours	Displays the number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the **Available Hours** balance at the top of the page.

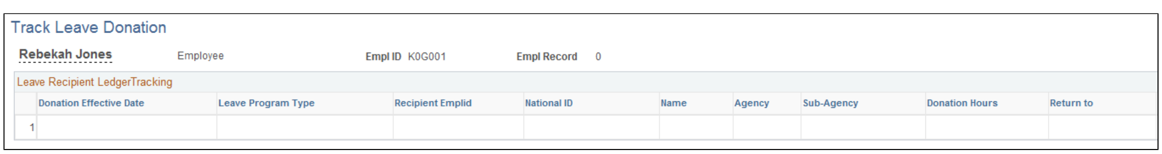
Track Leave Donation Page

Use the Track Leave Donation page (GVT_LV_DON_TRACK) to view leave donations to voluntary leave transfer programs.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Track Leave Donation** > **Track Leave Donation**

This example illustrates the fields and controls on the Track Leave Donation page. You can find definitions for the fields and controls later on this page.



Note: Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

The Track Leave Donation page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor's contributions by effective date and recipient.

Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the “Accrual Summary Page” (PeopleSoft Payroll for North America) after payroll is processed and leave accruals are run.

- Donors: The fields **Hours Taken Year-to-Date** and **Hours Balance Year-to-Date** are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the **Hours Taken Year-to-Date** and **Service Hours YTD** are updated.
- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

Related Links

“(USF) Reviewing and Adjusting Leave Accrual Balances” (PeopleSoft Payroll for North America)

Viewing Donor Contributions or Hours Received by Recipients

The Leave Bank and Transfer process inserts a row in the “Create Additional Pay Page” (PeopleSoft Payroll for North America) for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

Field or Control	***Description***
Earnings Code	The earnings code associated with the appropriate Leave Earn Type.
Effective Date	The As Of Date on the Leave Bank / Transfer page.
Earnings End Date	The end date of the pay period in which the effective date falls.
Hours	The hours donated or received.

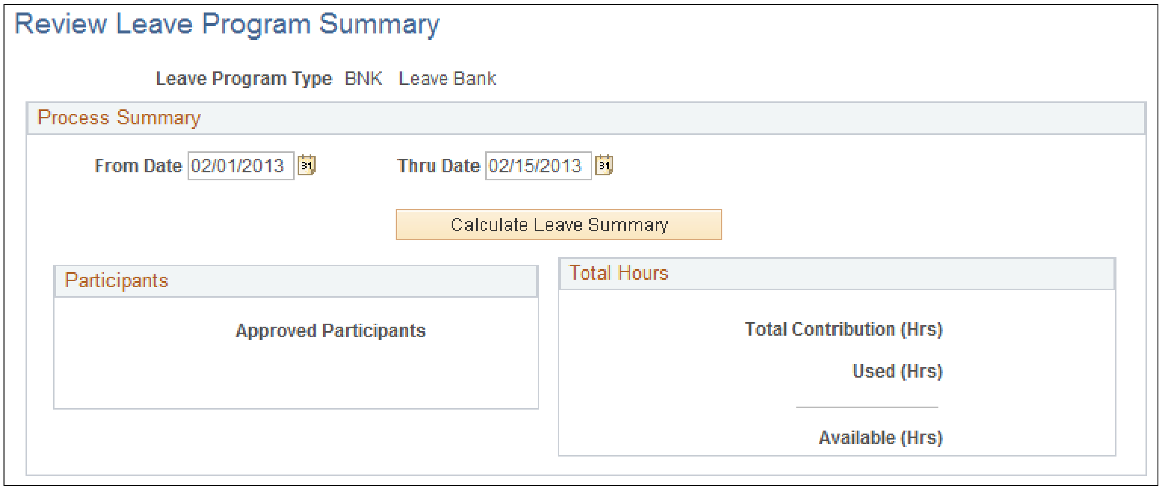
Review Leave Program Summary Page

Use the Review Leave Program Summary page (GVT_LV_PRGM_SUMM) to view a summary of participation in a leave transfer program.

Navigation:

Workforce Administration > **Leave Administration USF** > **Manage Leave Information** > **Review Leave Program Summary** > **Review Leave Program Summary**

This example illustrates the fields and controls on the Review Leave Program Summary page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
From Date and **Thru Date**	Define the time period for which you want to see a summary.
Calculate Leave Summary	Click after entering the date range. The system displays summary information.
Participants	The system displays the number of approved participants and denied participants.
Total Hours	The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports, which you can access by navigating to **Workforce Administration** > **Leave Administration USF** > **Reports**:

- FGPY028 – Leave Acceptance Notifications.
- FGPY029 – Leave Bank Participants (required by OPM).
- FGPY030 – Leave Transfer Participants (required by OPM).
- FGPY031 – Leave Denial Notifications.

Related Links

“PeopleSoft Payroll for North America Reports: A to Z” (PeopleSoft Payroll for North America)

Chapter 32

(USF) National Finance Center Processing

Understanding NFC Processing

The NFC processes payroll for the majority of U.S. civilian federal government employees. This population consists of approximately 600,000 individuals. Consequently, the NFC and its federal customers generate a high volume of human resources transactions each day. The NFC SINQ Import process enables you to upload the daily SINQ transaction file from NFC. Positions, job codes and personnel actions are identified and marked as SINQed (for example, failed). The last operator (OPRID) who updated the SINQ row is notified to correct transactions in the PeopleSoft Human Resources system.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.
Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.
Notifications delivered with HCM Image 48 or later must use Notification Composer.
For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Additionally, the NFC SINQ Import process:

- Automates the assignment of errors to human resources personnel in your agency.
- Enables human resource personnel to view and change transaction status.

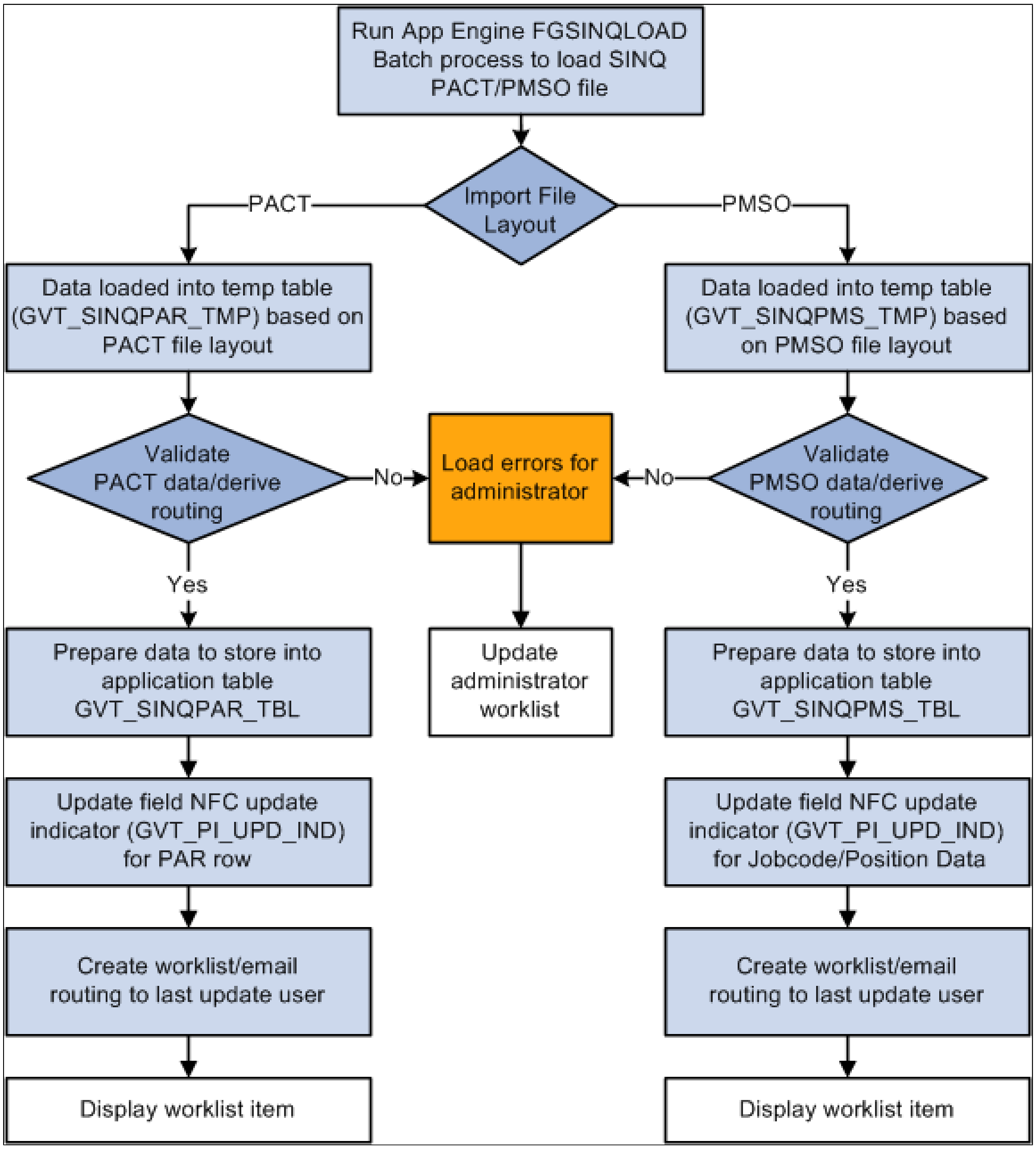
Common Elements Used in National Finance Center Processing

Field or Control	***Description***
National Finance Center (NFC)	Part of the U.S. Department of Agriculture that provides payroll services to more than 600,000 federal employees.
Personnel Action Processing System (PACT)	NFC's online system for entering personnel actions into the payroll and personnel databases.
Personnel Management System (PMSO)	NFC's online system used for creating, editing, inactivating, reactivating or deleting individual (position) and primary (jobcode) data. Position data must be entered into PMSO before personnel data can be entered into PACT.

Field or Control	***Description***
Personnel Edit Subsytem (PINE)	NFC's system that combines PACT and PMSO data and processes edits against the submitted personnel and position transactions. PACT and PMSO transactions must pass PINE edits before they are processed through NFC's Personnel Processing System (PEPL) to update the Payroll/Personnel System database (PPS). PINE processes Monday through Friday of each week, and the first Saturday of the pay period.
Suspense Inquiry and Correction System (SINQ).	Position (PMSO) and personnel (PACT) transactions that do not pass PINE edits are placed in the this system.

Understanding the Process Flow for the SINQ Import Process

This diagram shows the process flow for the SINQ Import process. The process is similar for PACT and PMSO except that different tables are used. For both PACT and PMSO, the batch process loads data into a temporary table, validates the data, prepares to move the data into an application table, updates the NFC update indicator field, and notifies the last update user:



This table describes the NFC PACT import file layout supported by the SINQ import process. A sample import file, fgnfcpinesinq.dat, is delivered under your product data directory.

Field Name	Start Position	Length	Field Type	Description
ERR_SSN_NO	1	9	Char	Employee SSN (no dashes)
ERR_SUBAGENCY	10	2	Char	NFC agency (sub) code (that is, 70, 71)
ERR_POI	12	4	Char	Agency Personnel Office Identifier
ERR_COMPANY	16	2	Char	Company Cd
ERR_DOC_TYPE	18	3	Char	NFC doc type (action)
ERR_PAY_PERIOD	21	2	Char	Pay period that action was processed in.
ERR_AUTH_DATE	23	6	Num	Date action was authorized
GVT_STATUS_TYPE	29	3	Char	NFC nature of action code (denotes correction or cancellation of action) CAN = 001, COR = 002
GVT_NOA_CODE	32	3	Char	NFC nature of action code (type of action)
ERR_EFFDT	35	6	Num	Date action was effective (month)
ERR_BATCH_NO	41	4	Char	NFC batch processing identifier
ERR_OPER_CODE	45	7	Char	HR specialist (id) submitting the action
ERR_CODE	52	3	Char	NFC error code
ERR_MSG	55	50	Char	NFC error message

This table describes the NFC PMSO import file layout supported by the SINQ import process. A sample import file, fgnfcpmsosinq.dat, is delivered under your product data directory.

Field Name	***Start Posn***	***Length***	***Field Type***	***Description***
SUSP_OPER_CD	1	7	Char	HR specialist (id) submitting the action
SUSP_MAST_INDV	8	4	Char	"MSTR" if job code action / "INDV" if position action
SUSP_FUNCTION_ CD	12	10	Char	Type of action performed (for example, CHANGE, ADD, and so forth)
SUSP_COMPANY	22	2	Char	Company Cd
SUSP_SUBAGCY	24	2	Char	NFC agency (sub) code (for example, 70, 71, and so forth)
SUSP_POI	26	4	Char	Agency Personnel Office Identifier Example: POI 1536 for Smithsonian
SUSP_JOBCODE	30	6	Num	Jobcode
SUSP_GRADE	36	2	Num	Pay grade level of position/job code
SUSP_POSITION_ NBR	38	8	Num	Position Number
SUSP_INCUM-SSN	46	9	Char	SSN of current or last employee holding position
SUSP_OBLIG-SSN	55	9	Char	SSN of new hire employee filling position
SUSP_PAY_PERIOD	64	2	Num	Pay period that action was processed in
SUSP_PASS_NUM	66	2	Num	NFC processing sequence within pay period (1, 2, 3, and so forth)

Field Name	Start Posn	Length	Field Type	Description
SUSP_ERR_CD	68	3	Num	NFC error code
SUSP_ERR_MSG	71	50	Char	NFC error message
SUSP_ELEM_NAME_NUM	121	3	Char	NFC element number (record field location) where error detected
SUSP_ELEM_NAME	124	30	Char	NFC element name (record field location) where error detected
SUSP_DATA_FIELD	154	8	Char	NFC element content (field value) where error detected

Supported Document Types

PeopleSoft delivers and supports four document types that correspond to the types of data imported during the SINQ Import process. The delivered document types are listed in this table:

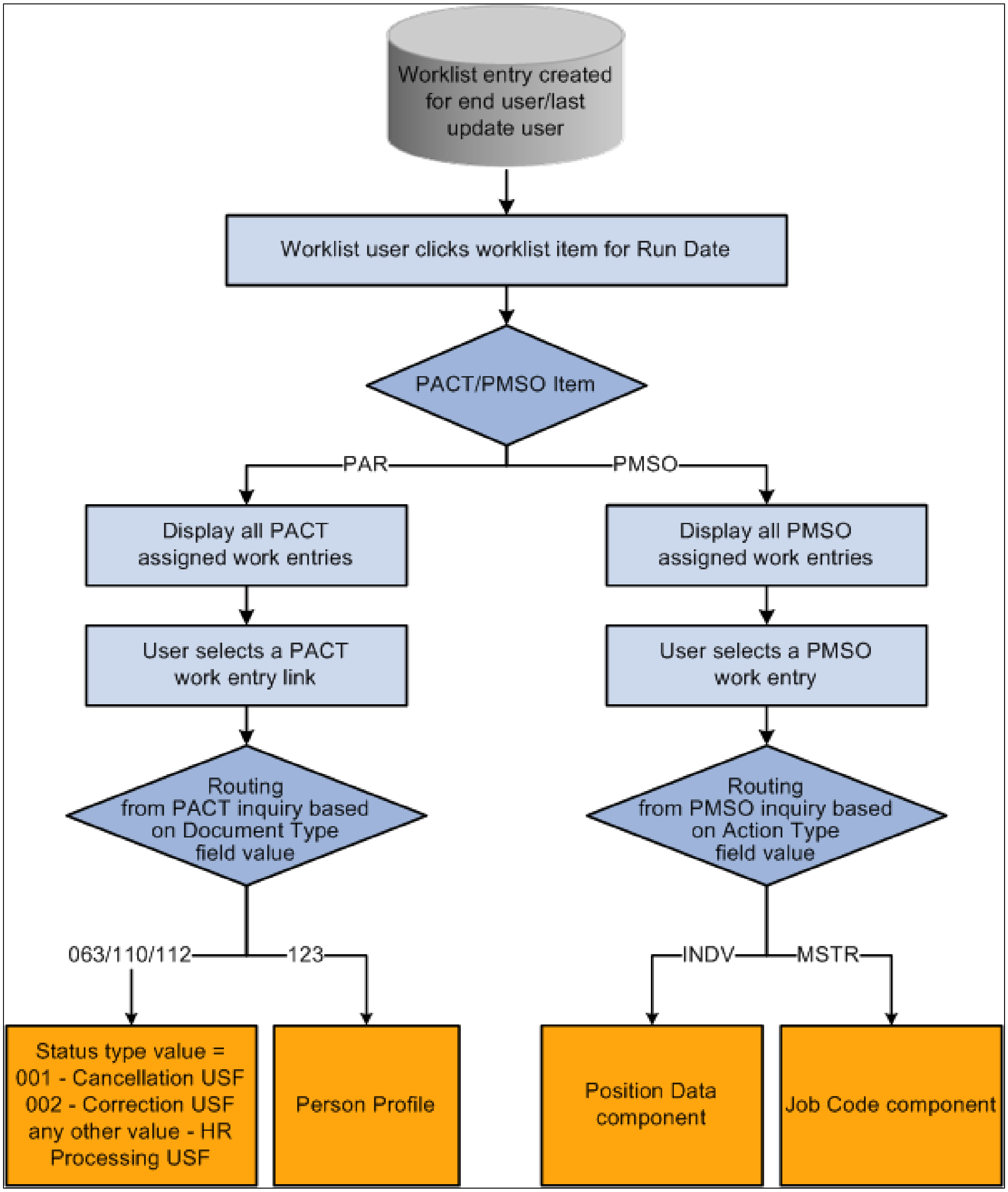
NFC Document Type	Description
063	Personnel Action
110	Award
112	Cash Award
123	Education

System administrators can filter any of these NFC document types when they run the SINQ Import process.

Understanding the Process Flow for SINQ Transactions

The SINQ Import process generates a worklist entry and an email message. The recipient uses the worklist entry to access a list of all PACT or PMSO assigned work entries. Clicking a work entry routes the user to the component where the work is to be performed.

The following diagram illustrates the process of using the worklist notification to access first the list of work entries and subsequently the components where the work is to be performed:



When a user selects an assigned work entry for a PACT SINQ row, the page that is displayed depends on the NFC document type and the status type values. If the NFC document type is 063 (Personnel action), 110 (Award action) or 112 (Education), the pages that are displayed are:

- If the Status type value equals 001, the Cancel Personnel Action USF (EE_CANCELLATION) component is displayed.
- If the Status type value equals 002, the Correct Personnel Action USF (EE_CORRECTION) component is displayed.

- If the Status type value equals blank or any other value, HR Processing USF (EE_HR_PROC) component is displayed.

See Understanding the Administering PAR System.

If the NFC document type is 123, the Person Profile component is displayed.

See “Person Profile Page” (PeopleSoft Human Resources Manage Profiles).

When a user select an assigned work entry for a PMSO SINQ row:

- If Action type field value is INDV, the Position Data component is displayed.
- If Action type field value is MSTR, the Job Code component is displayed.

See “Creating Positions” (PeopleSoft Human Resources Manage Positions), “Classifying Jobs” (Application Fundamentals).

Setting Up NFC Document Types

To set up NFC document types, use the NFC Import Document Types (GVT_NFC_DOC_TYPE) component.

This topic discusses how to set up NFC document types.

Page Used to Set Up NFC Document Types

Page Name	***Definition Name***	***Usage***
NFC Import Document Types Page	GVT_NFC_DOC_TYPE	Setup component for NFC document types.

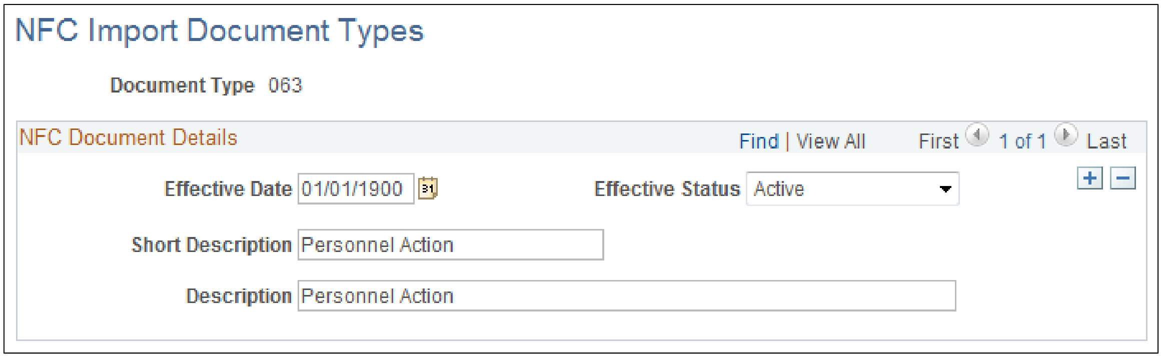
NFC Import Document Types Page

Use the NFC Import Document Types page (GVT_NFC_DOC_TYPE) to setup component for NFC document types.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > NFC Import Document Types > NFC Import Document Types

This example illustrates the fields and controls on the NFC Import Document Types page. You can find definitions for the fields and controls later on this page.



The four NFC document types that are supported by the SINQ import process are delivered by PeopleSoft. They are described in this table:

NFC Document Type	***Description***
063	Personnel Action
110	Award
112	Cash Award
123	Education

Setting Up NFC SINQ Import Process Parameters

To define NFC SINQ import process parameters, use the NFC Import Process Parameters (GVT_NFC_DOC_LIST) component.

This topic discusses how to set up process parameter lists that are used by the NFC SINQ Import process run control page;

Pages Used to Set Up NFC SINQ Import Process Parameters

Page Name	***Definition Name***	***Usage***
NFC Import Document List Page	GVT_NFC_DOC_LIST	Set up NFC document types that will be processed by the PACT SINQ import. This field corresponds to ERR_DOC_TYPE (position 18) on the PACT import file.

Page Name	*Definition Name*	*Usage*
NFC System UserId List Page	GVT_NFC_OPR_LIST	Enter UserIDs that the system will ignore during the SINQ Import process. The system uses *like* logic to make the comparison. This field corresponds to ERR_OPER_CODE (position 45) on the PACT import file.

NFC Import Document List Page

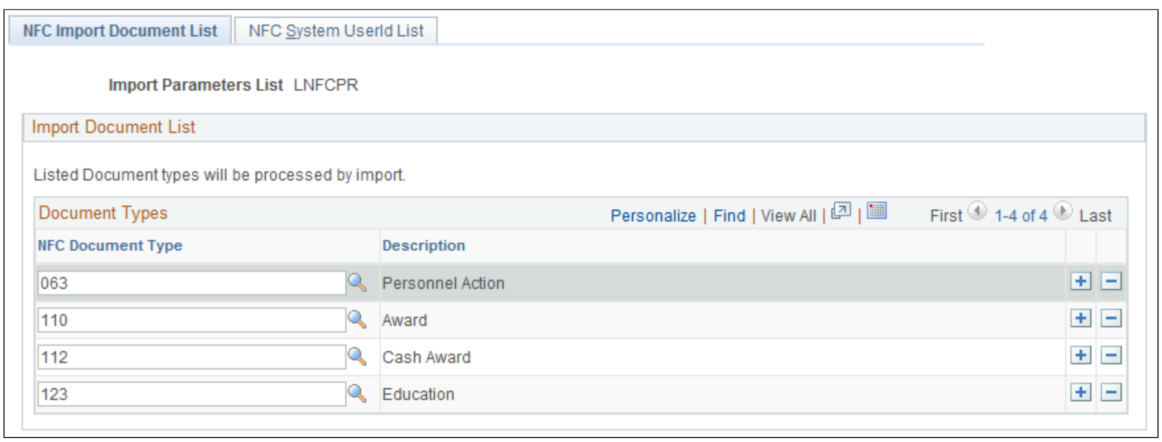
Use the NFC Import Document List page (GVT_NFC_DOC_LIST) to set up NFC document types that will be processed by the PACT SINQ import.

This field corresponds to ERR_DOC_TYPE (position 18) on the PACT import file.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Workforce Data USF** > **NFC Import Process Parameters** > **NFC Import Document List**

This example illustrates the fields and controls on the NFC Import Document List page. You can find definitions for the fields and controls later on this page.



Use this page to create lists containing different NFC PACT transactions to import during the SINQ Import process.

Note: You can easily add and delete rows from an Import Document List for a single SINQ Import process run using the **View Import Parameters List** link on the Run SINQ Import Process page.

NFC System UserId List Page

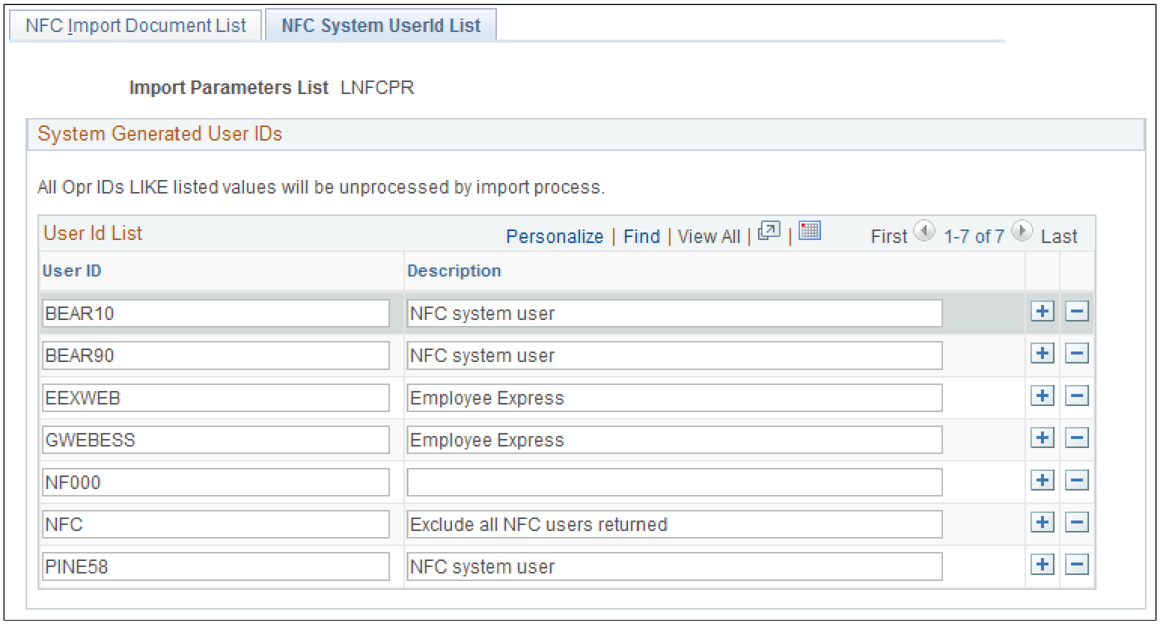
Use the NFC System UserId List page (GVT_NFC_OPR_LIST) to enter UserIDs that the system will ignore during the SINQ Import process.

The system uses *like* logic to make the comparison. This field corresponds to ERR_OPER_CODE (position 45) on the PACT import file.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > NFC Import Process Parameters > NFC System UserId List

This example illustrates the fields and controls on the NFC System UserId List page. You can find definitions for the fields and controls later on this page.



Enter User IDs that are from other systems that the SINQ Import process should ignore. The system performs the comparison based on *like* comparison logic.

Running the NFC SINQ Import Process

This topic discusses how to run the NFC SINQ Import process.

Page Used to Run the NFC SINQ Import Process

Page Name	***Definition Name***	***Usage***
Run SINQ Import Process Page	RUNCNTL_GVTSINQ	Run the NFC SINQ Import process.

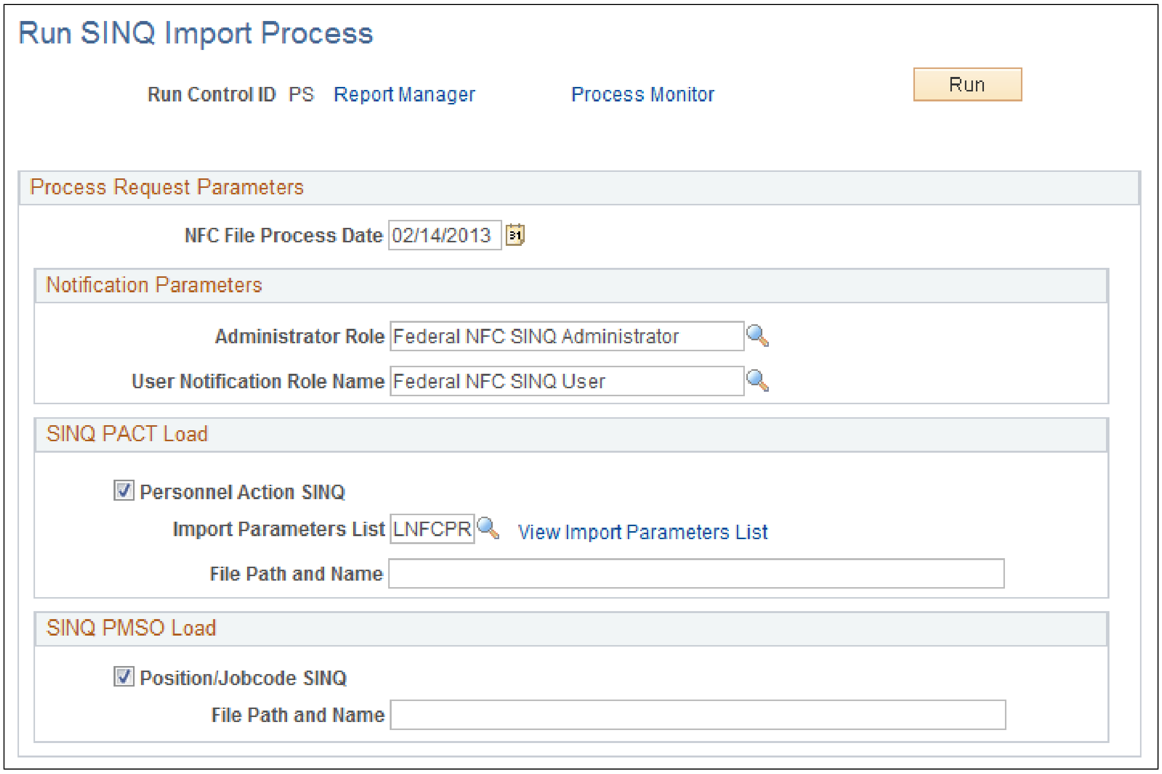
Run SINQ Import Process Page

Use the Run SINQ Import Process page (RUNCNTL_GVTSINQ) to Run the NFC SINQ Import process.

Navigation:

Workforce Administration > Collective Processes > NFC Import Process USF > Run SINQ Import Process > Run SINQ Import Process

This example illustrates the fields and controls on the Run SINQ Import Process page. You can find definitions for the fields and controls later on this page.



This page enables you to load only SINQ PACT transactions or only SINQ PMSO transactions, or both by selecting the corresponding check boxes in the **SINQ PACT Load** or the **SINQ PMSO Load** group boxes.

Field or Control	***Description***
NFC File Process Date	The date that is associated with all transactions that are imported during the SINQ Import process. System administrators can run the process only *once each day.*
Administrator Role	Enter the role that is assigned to administrators for whom Worklist items and email notification will be generated for this day's SINQ Import process transactions. This role enables you to view all imported transactions and reassign individual transactions to specific users.
User Notification Role Name	Enter the role that is assigned to users who will work on transactions that they last updated or saved, or transactions that the administrator assigns to them.
Personnel Action SINQ	Select this check box to import PACT SINQ transactions.
Import Parameters List	Select the Import Parameters List that contains the NFC document types to process.

Field or Control	***Description***
View Import Parameters List	Click this link to open the NFC Import Document List page for the selected Import Parameters List. Modify the document types listed and click **OK** to return to the Run SINQ Import Process page.
File Path and Name	Enter a share drive file location that is recognized by the process server.
Position/Jobcode SINQ	Select this check box to import PMSO SINQ transactions.

Administering SINQs

These topics discuss how to:

- Administer PACT SINQs.
- Administer PMSO SINQs.

Pages Used to Administer SINQs

Page Name	***Definition Name***	***Navigation***	***Usage***
Administer PACT SINQs - Assigned SINQs Page	GVT_SINQPACT_ADMIN	**Workforce Administration** > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Assigned SINQs**	Work with assigned PACT SINQs.
Administer PACT SINQs - Import Errors Page	GVT_SINQPACT_ERR	**Workforce Administration** > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Import Errors**	Review details about PACT transactions that were not imported.
Unprocessed Transactions Page	GVT_SINQPACT_UNPRO	**Workforce Administration** > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Unprocessed Transactions**	Review details and the reason why NFC transactions were not processed by the SINQ Import process.

Page Name	*Definition Name*	*Navigation*	*Usage*
Administer PMSO SINQs - Assigned SINQs Page	GVT_SINQPMSO_ADMIN	**Workforce Administration** > **Collective Processes** > **NFC Import Process USF** > **Administer PMSO SINQs** > **Assigned SINQs**	Work with assigned PMSO SINQs.
Administer PMSO SINQs - Import Errors Page	GVT_SINQPMSO_ERR	**Workforce Administration** > **Collective Processes** > **NFC Import Process USF** > **Administer PMSO SINQs** > **Import Errors**	Review details of PMSO error transactions.

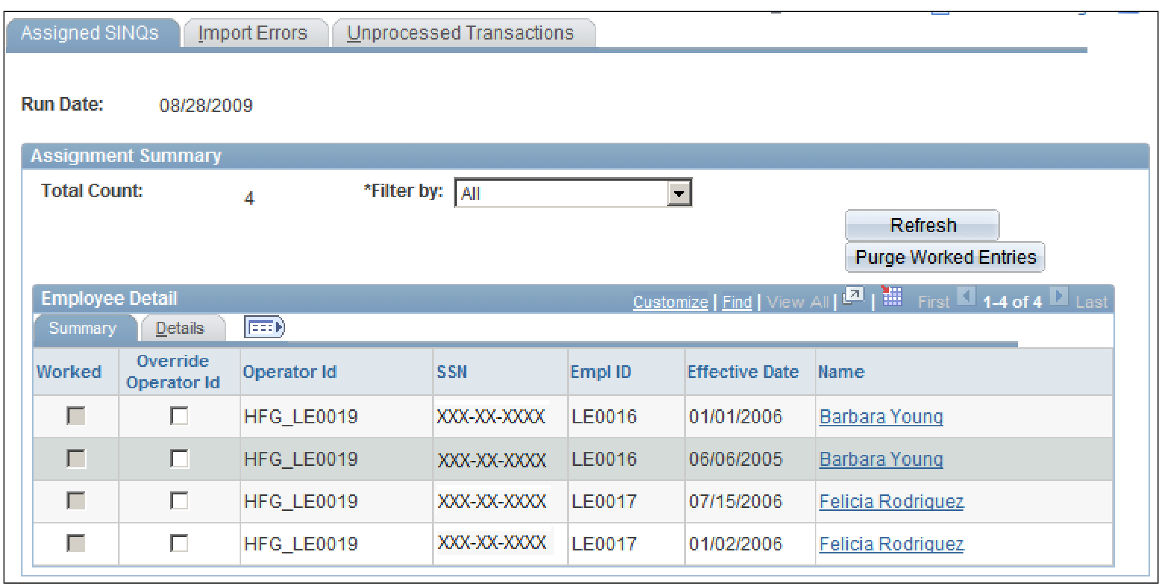
Administer PACT SINQs - Assigned SINQs Page

Use the Administer PACT SINQs - Assigned SINQs page (GVT_SINQPACT_ADMIN) to work with assigned PACT SINQs.

Navigation:

Workforce Administration > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Assigned SINQs**

This example illustrates the fields and controls on the Administer PACT SINQs - Assigned SINQs page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Filter by	Select the criterion by which to filter the transactions listed in the **Assignment Summary** grid. All options use *like* comparison logic, except *Effective Date* (date format) and *Pay Period* (numeric format).
Refresh	Click this button after selecting a filter and a comparison value to refresh the list of transactions.
Purge Worked Entries	Click this button to remove from the grid updated transactions that have the check box selected in the **Worked** column.
Override Operator Id	Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.
Name	Click the link in this column to access the HR Processing component, Data Control page for that employee.

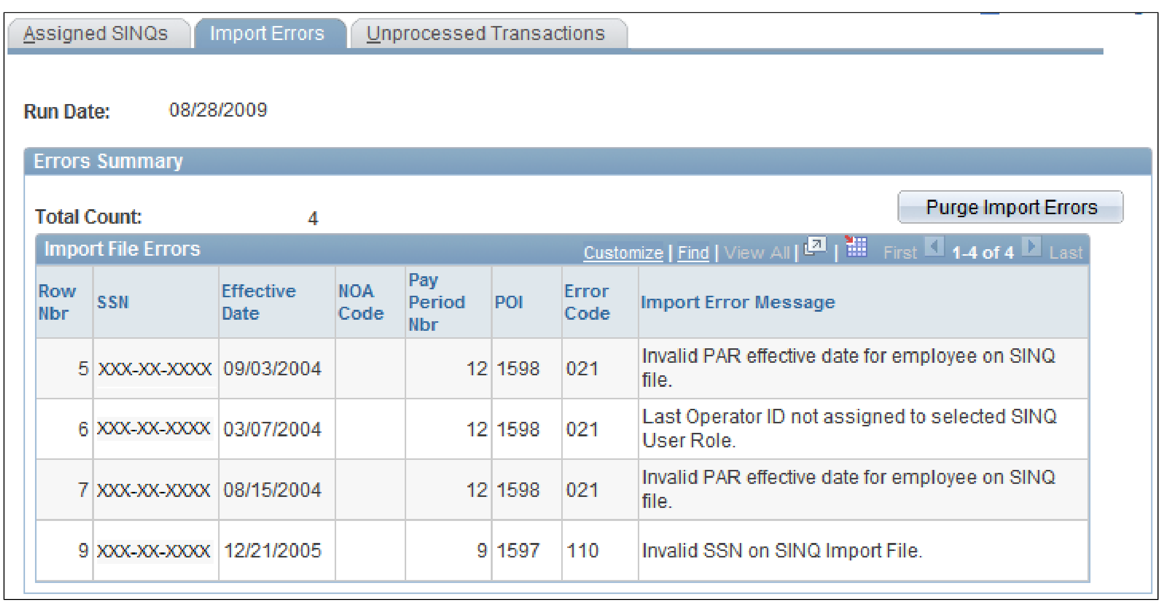
Administer PACT SINQs - Import Errors Page

Use the Administer PACT SINQs - Import Errors page (GVT_SINQPACT_ERR) to review details about PACT transactions that were not imported.

Navigation:

Workforce Administration > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Import Errors**

This example illustrates the fields and controls on the Administer PACT SINQs - Import Errors page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Purge Import Errors	Click this button to purge PACT error transactions from the import process.

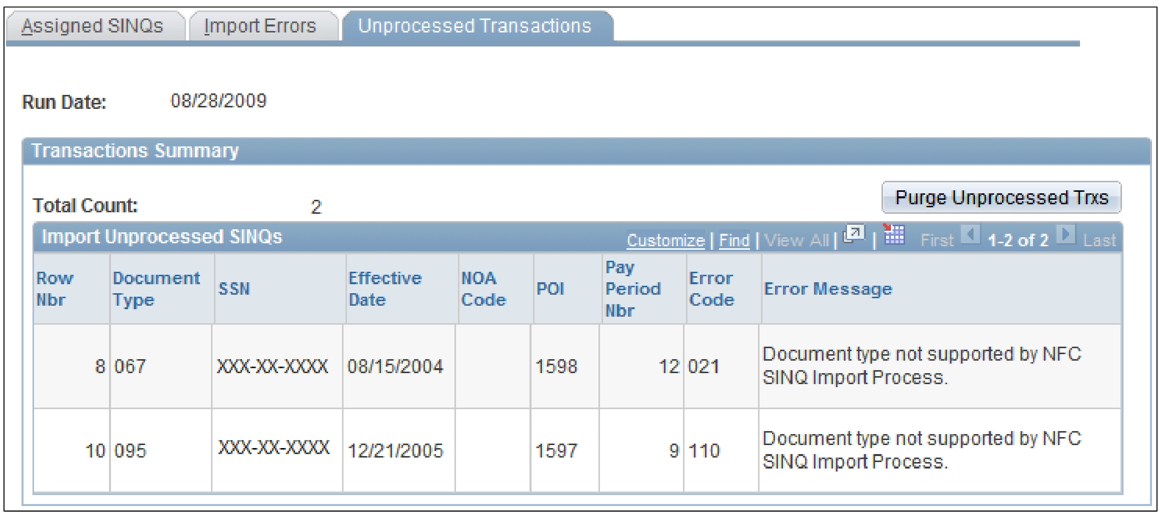
Unprocessed Transactions Page

Use the Unprocessed Transactions page (GVT_SINQPACT_UNPRO) to review details and the reason why NFC transactions were not processed by the SINQ Import process.

Navigation:

Workforce Administration > **Collective Processes** > **NFC Import Process USF** > **Administer PACT SINQs** > **Unprocessed Transactions**

This example illustrates the fields and controls on the Unprocessed Transactions page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Purge Unprocessed Trxs (purge unprocessed transactions)	Click this button to purge PACT unprocessed transactions from the import process.

See Understanding the Process Flow for SINQ Transactions.

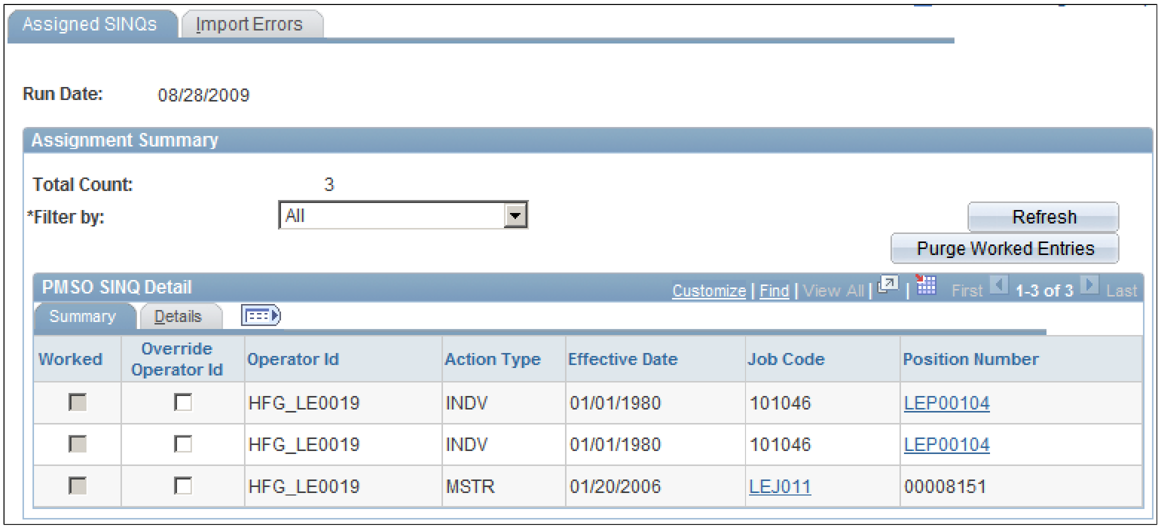
Administer PMSO SINQs - Assigned SINQs Page

Use the Administer PMSO SINQs – Assigned SINQs page (GVT_SINQPMSO_ADMIN) to work with assigned PMSO SINQs.

Navigation:

Workforce Administration > **Collective Processes** > **NFC Import Process USF** > **Administer PMSO SINQs** > **Assigned SINQs**

This example illustrates the fields and controls on the Administer PMSO SINQs - Assigned SINQs page. You can find definitions for the fields and controls later on this page.



For rows with an **Action Type** *INDV* and a link in the **Position Number** column, click the link to open the JOB_CODE_TBL component pages for that row.

For rows with an **Action Type** *MSTR* and a link in the **Job Code** column, click the link to open the POSITION_DATA component pages for that row.

Field or Control	***Description***
Filter by	Select the criterion by which to filter the transactions listed in the **Assignment Summary** grid. All options use *like* comparison logic, except *Pay Period* (numeric format).
Refresh	Click this button after selecting a filter and a comparison value to refresh the list of transactions.
Purge Worked Entries	Click this button to remove from the grid updated transactions that have the check box selected in the **Worked** column.
Override Operator Id	Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.
Job Code	Click the link in this column to access the Job Code Table component for that job code.
Position Number	Click the link in this column to access the Position Data component for that position number.

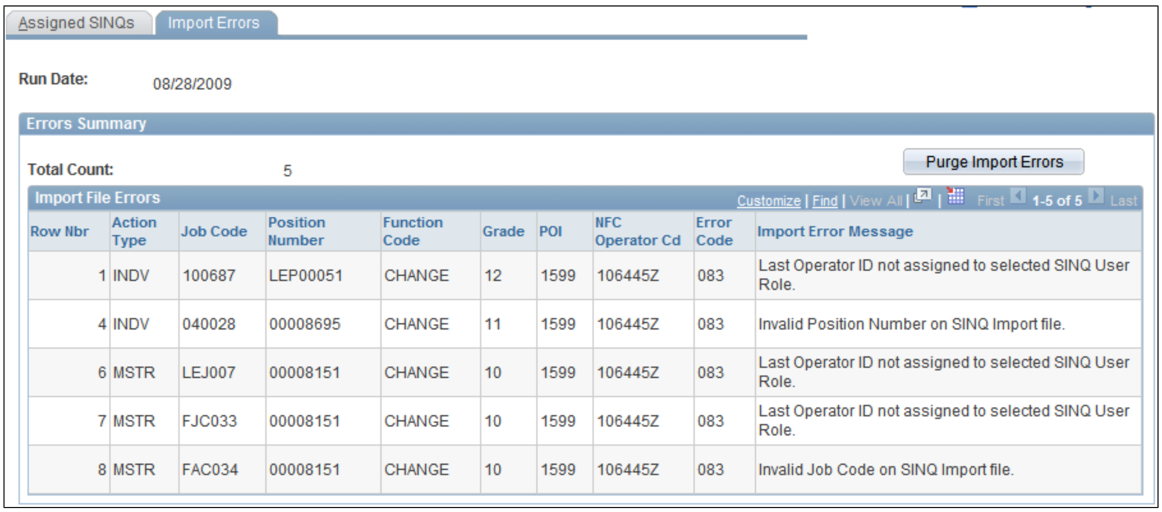
Administer PMSO SINQs - Import Errors Page

Use the Administer PMSO SINQs - Import Errors page (GVT_SINQPMSO_ERR) to review details of PMSO error transactions.

Navigation:

Workforce Administration > **Collective Processes** > **NFC Import Process USF** > **Administer PMSO SINQs** > **Import Errors**

This example illustrates the fields and controls on the Administer PMSO SINQs - Import Errors page. You can find definitions for the fields and controls later on this page.


Assigned SINQs | Import Errors

Run Date: 08/28/2009

Errors Summary

Total Count: 5

Purge Import Errors

Import File Errors — Customize | Find | View All | First 1-5 of 5 Last

Row Nbr	Action Type	Job Code	Position Number	Function Code	Grade	POI	NFC Operator Cd	Error Code	Import Error Message
1	INDV	100687	LEP00051	CHANGE	12	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
4	INDV	040028	00008695	CHANGE	11	1599	106445Z	083	Invalid Position Number on SINQ Import file.
6	MSTR	LEJ007	00008151	CHANGE	10	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
7	MSTR	FJC033	00008151	CHANGE	10	1599	106445Z	083	Last Operator ID not assigned to selected SINQ User Role.
8	MSTR	FAC034	00008151	CHANGE	10	1599	106445Z	083	Invalid Job Code on SINQ Import file.

Field or Control	***Description***
Purge Import Errors	Click this button to purge PMSO error transactions from the import process.

See Understanding the Process Flow for SINQ Transactions.