PeopleSoft Human Capital Management 9.2

Application Fundamentals



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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.

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. 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."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

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 three main types of common help are:

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- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

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.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

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.

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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, Country, 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

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Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that 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

Application Fundamentals: 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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1

Getting Started with PeopleSoft HCM

PeopleSoft HCM Overview

PeopleSoft HCM is an integrated suite of applications and business processes that are based on PeopleSoft's Pure Internet Architecture (PIA) and portal technologies.

The sophisticated features and collaborative, self-service functionality available in PeopleSoft HCM enable you to manage your human resources from recruitment to retirement while aligning your workforce initiatives with strategic business goals and objectives.

PeopleSoft HCM Integrations

PeopleSoft HCM integrates with other PeopleSoft applications, such as PeopleSoft Financials, PeopleSoft Workforce Analytics, and PeopleSoft Learning Management. PeopleSoft HCM also integrates with other third-party applications. PeopleSoft HCM uses various integration technologies to send and receive data.

We discuss integration considerations in the implementation topics in the documentation. Supplemental information about third-party application integrations is located on the My Oracle Support website.

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

This table lists all of the components discussed in this documentation that have component interfaces:

Component	Component Interface	References
Departments component (DEPARTMENT_TBL)	DEPARTMENT_TBL	See Maintaining Departments.
Establishment component (ESTABLISHMENT_DATA)	ESTABLISHMENT_DATA	See Defining Establishments.
Job Code Task Table component (JOBCODE_TASK_TABLE)	JOBCODE_TASK_TABLE	See Defining Job Tasks.
Job Code Table component (JOB_CODE_TBL)	CI_JOB_CODE_TBL	See Classifying Jobs.

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Component	Component Interface	References
Setup Job Tasks component (JOB_TASK_TABLE)	JOB_TASK_TABLE	See Defining Job Tasks.
Location component (LOCATION_TABLE)	LOCATION_TABLE	See Establishing Locations.
FLSA Calendar Table (FLSA_CALENDAR)	FLSA_CALENDAR	See FLSA Calendar Table Page.
Pay Run Table (PAY_RUN_TABLE)	PAY_RUN_TABLE	See Pay Run Table Page.
Tax Location Table component (TAX_LOCATION_TBL)	TAX_LOCATION_TBL	See Defining Tax Locations.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) article on My Oracle Support 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.

See *PeopleTools: Setup Manager*.

Related Topics

- Enterprise Components

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2

Understanding HCM

Control Tables, Transaction Tables and Prompt Tables

PeopleSoft HCM is a table-based system that stores critical general data, such as companies, work locations, and system specifications in a central location. The system enables users to access the same basic information while maintaining data accuracy and integrity.

Tables that are central to PeopleSoft HCM include control tables, transaction tables, and prompt tables.

See *PeopleTools: Application Designer Developer's Guide*.

Control Tables

Control tables store information that is used to process and validate the day-to-day business activities (transactions) users perform with PeopleSoft HCM applications.

The information stored in control tables is common and shared across an organization, for example, primary lists of customers, vendors, applications, items, or charts of accounts. By storing this shared information in a central location, control tables help to reduce data redundancy, maintain data integrity, and ensure that users have access to the same basic information.

The information stored in control tables is generally static and is updated only when fundamental changes occur to business policies, organizational structures, or processing rules.

> **Note**
>
> Control tables are tables that include the SETID key field (set ID). As you set up control tables, you'll notice that it is the set ID that enables control table information to be shared across business units.

Transaction Tables

Transaction tables store information about the day-to-day business activities (transactions) users perform with PeopleSoft HCM applications.

The information stored in transaction tables often changes and is updated more frequently than the information stored in control tables.

> **Note**
>
> Transaction tables are tables that include the BUSINESS_UNIT field (which may or may not be used as a key field).

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Prompt Tables

Prompt tables are tables that are associated with fields on PeopleSoft application pages and which display valid data values for those fields when a user selects a prompt or search option.

The data values stored in prompt tables are retrieved from control tables, transaction tables, or other PeopleSoft tables.

Business Units, Tablesets and Set IDs

PeopleSoft regulates HCM system data through the use of business units, tablesets, and set IDs.

Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HCM based on how *your* business is organized.

You must define at least one business unit. The BUSINESS_UNIT field is included on all transaction tables.

Tablesets and Set IDs

Tablesets and set IDs are devices that enable you to share – or restrict – information across business units. For example, with tablesets and set IDs you can centralize redundant information such as country codes while keeping information such as departments and job codes decentralized. The overall goal of tablesets and set IDs is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

You must define at least one tableset (set ID). The SETID key field is included on all control tables.

Related Topics

- Understanding PeopleSoft HCM System Data Regulation
  As companies grow larger and more complex, they often need to collect the same type of data across many locations. PeopleSoft business units and setIDs enable you to organize businesses into logical units other than companies and departments and to define how organizational data is shared among these units.

Effective Dates

PeopleSoft HCM uses effective dates to store historical, current, and future information. Effective dates enable you to:

- Maintain a chronological history of your data. By storing effective-dated information in tables, the system enables you to review past transactions and plan for future events. For example, you can roll back your system to a particular time to perform historical analyses for your company. Or, you can set up tables and data ahead of time without using tickler or pending files.
- Maintain the accuracy of your data. By comparing the effective dates in prompt tables to the effective dates on application pages, the system displays only those values that are valid for the current time period. For example, you create a new department code with an effective date of May 1, 2008. Then, on the Job Data pages, you enter a new data row for

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an employee with an effective date *before* May 1, 2008. When you select the prompt for the department field, you won't see the new department code because it is not in effect.

For more information, see the product documentation for *PeopleTools: Application Designer Developer's Guide*.

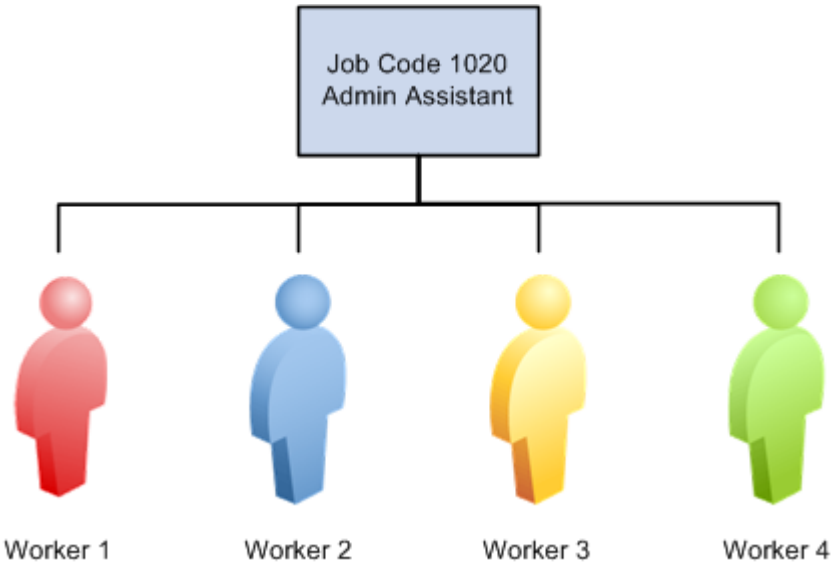
Person or Position Structure

PeopleSoft HCM enables you to structure or drive your PeopleSoft Human Resources system by person or by position. Before you set up information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

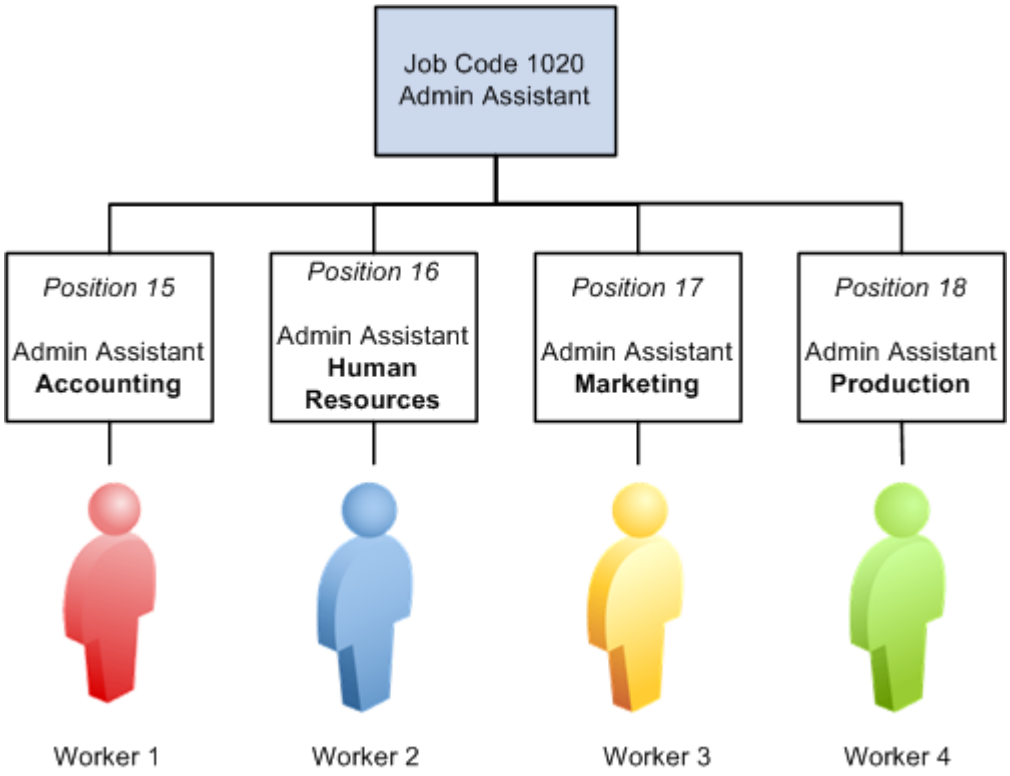
When you drive PeopleSoft Human Resources by person, you use job codes to classify job data into groups. You use those codes to link person data to job data. When you drive PeopleSoft Human Resources by position, you still use job codes to create general groups, or job classifications, in your organization, such as EEO (equal employment opportunity) and salary survey data, but you *also* uniquely identify each position in a job code and link people to those positions.

Job codes primarily have a one-to-many relationship with workers. Many workers share the same job code, even though they might perform the work in different departments, locations, or companies, as shown in the diagram below. You identify the job that a worker performs through the data that you enter in the worker's job records:



In contrast, positions usually have a one-to-one relationship with workers. However, you can have several positions with the same job code; positions track details of a particular job in a specific department or location. For example, in job code 1020, Administrative Assistant, you can define different administrative assistant positions with different position numbers—position 15 in accounting, position 16 in the human resources department, position 17 in your marketing department, and position 18 in your production group. Workers are then assigned to these specific positions. The following diagram represents this method:

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When you drive your system by position, you define specific attributes of various positions and then move workers in and out of those positions. You track specific information that is related to a position, such as a phone number or mail stop, regardless of whether a person actually fills that position. And you use data that is specific to each position as the basis for organization planning, recruitment, career planning, and budgeting.

Why Does It Matter?

You won't see much difference between the two methods as you work with pages and tables, but the system processes the data differently according to whether you drive it by person or position. That affects how and where you enter and maintain data for people and positions (or jobs).

Which Method Should You Use?

To determine whether you should drive your system by person or position, consider the following:

- If your organization is fluid (that is, if you tend to look at broader groups of workers and create new jobs often), then driving the system by person is probably best for you.

  This method is useful if your organization is continually expanding or if new projects require that you create new jobs or job types regularly.

- If your organization is fairly static (that is, if jobs and job descriptions are mostly fixed, and people move in and out of the same positions), then driving the system by position is probably best for you.

  For example, government agencies and hospitals, which plan positions based on budgets (often well in advance of filling the positions), find this method very useful.

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- If you find that both methods work well in different areas of your organization, you can drive PeopleSoft Human Resources both ways.

  For example, you might find that driving the system by position works well for some departments or management levels in your company and that driving the system by person works well for others. If so, you can use both methods with a setting called *partial position management.*

> **Note**
>
> This decision doesn't affect your PeopleSoft payroll system. No matter which method you choose, using PeopleSoft Payroll for North America or PeopleSoft Global Payroll is not a problem.

Considerations for Pension, Payroll, and Benefits Applications

If you use PeopleSoft Pension Administration, you track your pension payees—retirees, beneficiaries, and QDRO (qualified domestic relations order) alternate payees—using the same tables that you use to track your workers. You want to drive your retiree organization by person (or in this case, by payee), rather than by position, so that you don't have to establish a different position for each payee in the system. To drive your worker organization by position and your payee organization by person, use the partial position management option.

This also applies to organizations that use PeopleSoft Global Payroll and PeopleSoft Payroll for North America. If your organization uses the PeopleSoft Human Resources Manage Base Benefits business process or PeopleSoft Benefits Administration, you can set up your position management options using full or partial position management.

Related Topics

- PeopleSoft Human Resources Manage Positions: Understanding Positions
- PeopleSoft Human Resources Administer Workforce: Understanding Job Data

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3

Working with System Data Regulation in HCM

Understanding PeopleSoft HCM System Data Regulation

As companies grow larger and more complex, they often need to collect the same type of data across many locations. PeopleSoft business units and setIDs enable you to organize businesses into logical units other than companies and departments and to define how organizational data is shared among these units.

PeopleSoft HCM system data is regulated through the use of business units, tablesets and set IDs, and tableset sharing. Business units are logical devices that enable you to implement PeopleSoft HCM based on how *your* business is organized. Tablesets, set IDs, and tableset sharing are organizational devices that enable you to share – or restrict – the information stored in your HCM system across business units:

Term	Definition
Business Unit	A logical organizational entity.
Set ID	A high-level key on many control tables.
TableSet	Set of rows on a control table, grouped by set ID, that is available to specific business units.

Components Used to Set Up Business Units and Set IDs

Once you've developed your business unit map, use the following components to set up business units and set IDs and to define system defaults based on permission lists or business units:

Component	Location
TableSet IDs component (SETID_TABLE)	**PeopleTools**, and then **Utilities**, and then **Administration**, and then **TableSet IDs**
Business Unit component (HR_BUSINESS_UNIT) See Defining Business Units.	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Business Unit**
Record Groups component (REC_GROUP_TABLE)	**PeopleTools**, and then **Utilities**, and then **Administration**, and then **Record Group**
Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) See Setting Up Primary Permission List Preferences.	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Org Defaults by Permission Lst**
Business Unit Options Defaults component (BUS_UNIT_OPT_HR) See Business Unit Options Defaults Page.	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Business Unit Options Defaults**
TableSet Control component (SET_CNTRL_TABLE1)	**PeopleTools**, and then **Utilities**, and then **Administration**, and then **TableSet Control**

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Prerequisites

Before you implement PeopleSoft HCM, take a close look at how your business operates and analyze how you want to map your organization's business structures, practices, and procedures.

You can set up business units and tableset IDs before or after setting up the Installation Table component (INSTALLATION_TBL) and entering companies on the Company component (COMPANY_TABLE). However, you should set up the Installation Table component and Company component before continuing on to the TableSet Control component, Business Unit Options Defaults component, and Org Defaults by Permission Lst component.

Working with Business Units

These topics provide an overview of business units and discuss how to determine your business unit structure.

Understanding Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HCM based on how your business is organized.

Business units share processing rules and you can create them at any level of the organization that makes sense and that reflect the needs of your internal human resources departments. If you use the same processing rules across the organization, it may make sense to have a single business unit; if you use different rules in different companies, countries, or functional areas, you may choose to create multiple business units.

Because PeopleSoft HCM doesn't offer any predetermined definition for a business unit (as it does for a department and a company), you can implement this organizational level in your PeopleSoft HCM applications to reflect your own enterprise's structure. You can share business units across any combination of PeopleSoft HCM, Financials, Manufacturing, and Distribution applications or define them in just one PeopleSoft application.

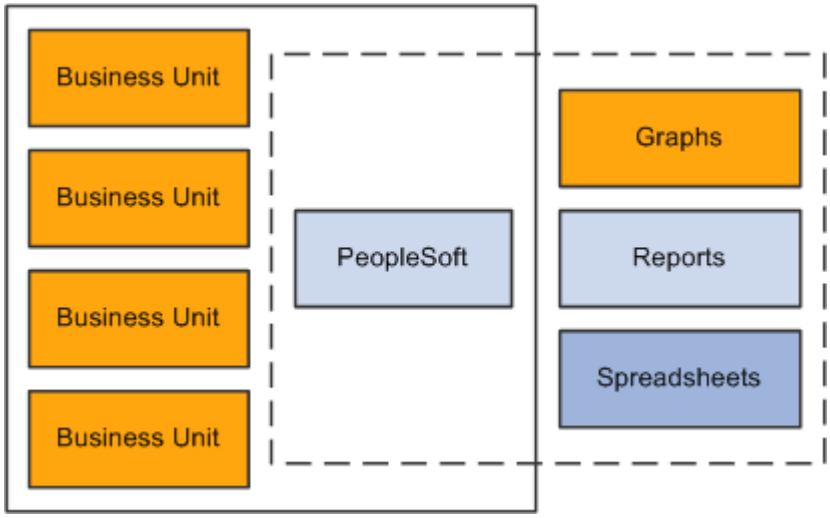
> **Note**
>
> For PeopleSoft HCM, you *must* establish at least one business unit.

You have complete control over how you define business units in your PeopleSoft HCM system, as well as how you use them to facilitate the handling of data in your data organization. For example, you could set up a business unit for each legal entity in your organization, all to be processed by a central human resources department that interfaces with and manages each business unit's information, workers, and processes. Alternatively, you could set up one business unit for each company, location, or branch office in your enterprise, enabling each unit to manage its own human resources information independently, while sharing data with a central, parent business unit.

While each business unit maintains its own human resources information, your organization can maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit. More importantly, as this diagram illustrates, you can

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produce reports across business units, enabling you to see the big picture and to compare the finest details.



Related Topics

- Control Tables, Transaction Tables and Prompt Tables
  PeopleSoft HCM is a table-based system that stores critical general data, such as companies, work locations, and system specifications in a central location. The system enables users to access the same basic information while maintaining data accuracy and integrity.

Determining Your Business Unit Structure

Business units offer a flexible structuring device through which you can implement PeopleSoft HCM based on the way your business is organized. In some organizations, the correspondence between existing structures and the business model is obvious. In other cases, it may take some careful thought and analysis to determine how to set up the business units to best reflect your organizational structure and to best use the exceptional power and capabilities of PeopleSoft HCM. When deciding how to establish business units for your PeopleSoft HCM implementation, keep the following points in mind:

- With business unit functionality, you have another level for associating a person with your company's organizational scheme.
- Business units are always associated with a job, position, and a person's job record.
- Business units have no predetermined definition (unlike department and a company). You can implement this new organizational level as you determine its usefulness to your enterprise.
- Business units are not legal entities, but a way of tracking specific business information for reporting and other rollup data collection.

Work closely with your PeopleSoft implementation partner early in your design to determine how best to define the business units for your PeopleSoft HCM system. Every organization has different requirements, and it's not possible to cover all the variables that you might encounter. However, once you've identified your business unit structures and made a tentative decision about how many business units you'll need, take a step back and ask the following questions:

- Are the business unit structures and number of business units correct?

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- Is there any reason why these structures would not work?
- Will these structures preclude me from taking advantage of some functionality that I might want to use?
- Will these structures restrict my reporting options?
- Will these structures cause me to process more than I want to process on any particular night?

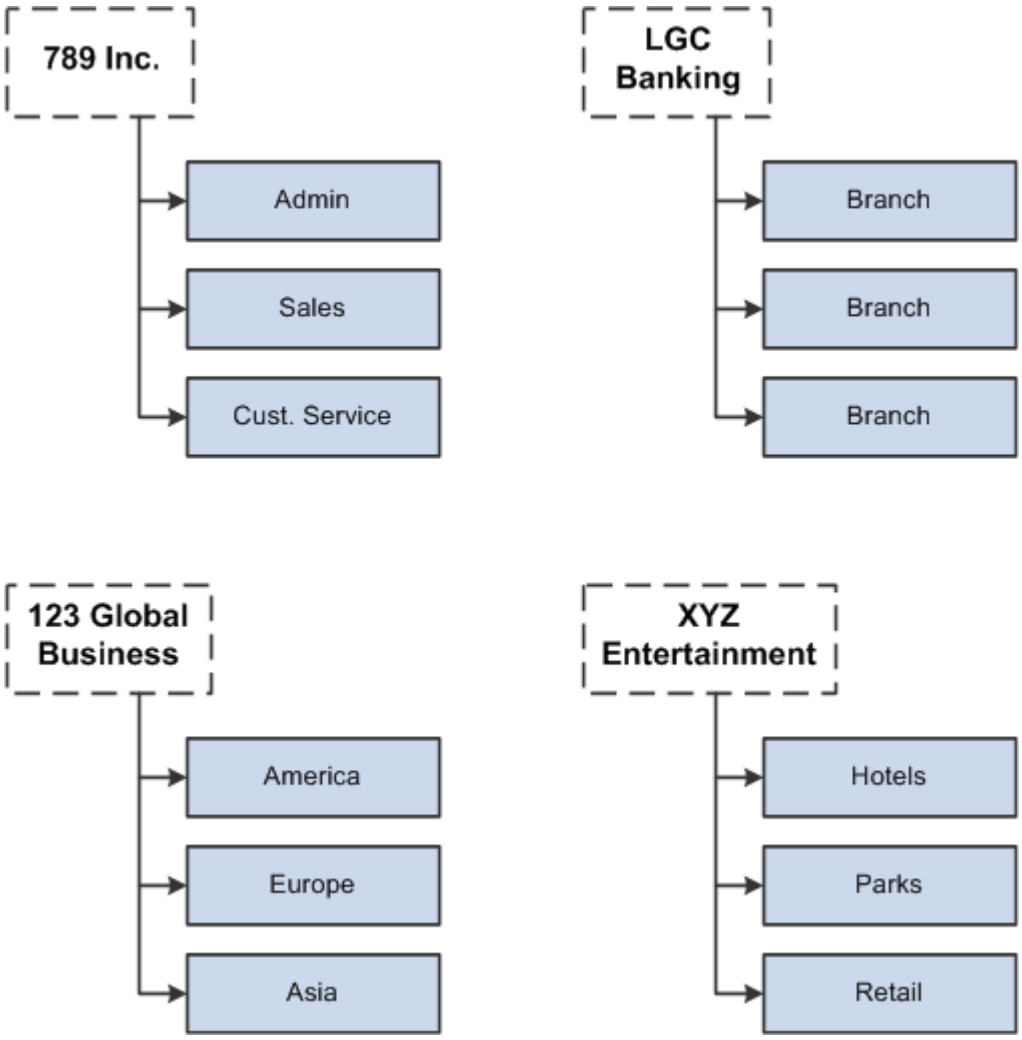
Possible Business Unit Structures

How you define a business unit depends on your industry, statutory requirements, regulatory reporting demands, or how you've organized operating responsibilities.

Consider the following scenarios and the supporting diagram below:

- *789 Inc.* chooses to organize information by functionality or purpose, such as what is going on in Sales versus Customer Service. It has created business units that reflect the administrative needs of their human resources, benefits, and payroll departments.
- *LGC Banking* treats each branch as a business unit, which means that the bank could do reporting for its people within each branch.
- *123 Global Business* is a multinational company that separates its operations geographically because of the necessities of conducting business abroad. What is more important to this organization may not be each office, but each location. What's happening in their American facility versus their European or Asian market? Then they can track their business requirements and business needs accordingly.
- *XYZ Entertainment* has subsidiary companies. A highly diversified organization like this one might choose to define each subsidiary company or cost center as a business unit. They might have a hotel business as well as a retail business and they might want to keep this information separate, yet still be able to roll everything up into one database and maintain it in a single location.

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You can also use a combination of all of these methods, or any other entity or entities that makes sense for your organization. You can have as many business units as you need, although the more business units you establish, the more information you need to maintain. You do, however, need to have at least one business unit in the system.

Implementing Business Units

While you can implement one business unit for your entire organization, establishing multiple business units can offer important reporting and data control options. Multiple businesses units enable you to:

- Maintain a tree structure to facilitate organization-specific, rollup reporting.
- Distribute administration of certain control tables, such as the Department component (DEPARTMENT_TBL) or the Location component (LOCATION_TABLE) to different business units.

  For large or multinational companies, this feature of business unit functionality in PeopleSoft HCM is useful for controlling data flow across different parts of the enterprise.

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> **Note**
>
> If you implement PeopleSoft Benefits Administration, you can define eligibility rules that determine workers' benefits eligibility based on their business unit affiliation.

Working with TableSets

These topics provide an overview of tablesets and discuss how to:

- Set up tableset sharing.
- Control data sets.
- Reference multiple set IDs.

Understanding Tablesets

To work with tablesets, you need to be able to distinguish between tablesets, set IDs, and tableset sharing:

Term	Definition
tableset	A set of data rows in a control table that is identified by the same high-level key.
set ID	The high-level key that identifies a set of data rows. There are two types of set IDs: • Physical Set IDs The set ID of a business unit (BUSINESS_UNIT = SETID). The rows of data in a physical set ID have a one to one relationship with the business unit. • Logical Set ID A logical set ID that is generic and determined by business rules other than business unit. Logical set IDs enable you to share rows of data across multiple business units.
tableset sharing	Sharing rows of data in a tableset across business units or limiting rows to a single business unit.

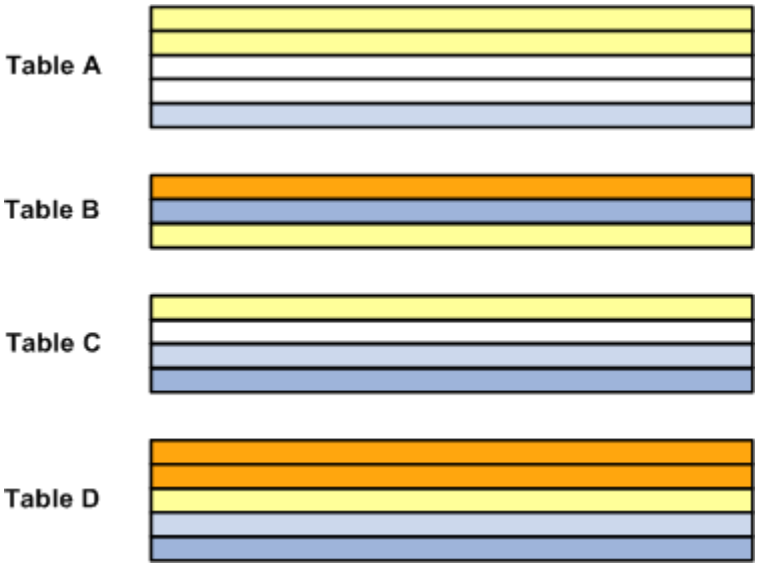
> **Note**
>
> The terms tableset and set ID are sometimes used interchangeably. In many cases, this is correct, but it can cause some confusion.

You can define as many tablesets as you like, but the more you create, the more complex tableset sharing becomes. Some organizations need only one tableset.

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> **Note**
>
> For PeopleSoft HCM, you must create at least one tableset and set ID.

Since you use set IDs to distinguish sets of rows in a table, you will always have the same number of set IDs as you have tablesets. For example, the following diagram shows four control tables. Each color within the table represents a set ID, and all rows with the same color represent a tableset. Tables A and B are made up of three tablesets each, and tables C and D consist of four different tablesets, but there is a total of five set IDs, or tablesets, between the four tables:



PeopleSoft Human Resources control tables that are keyed according to set ID include the:

- Location component.
- Department component.
- Salary Plan component.
- Job Code component.

Tableset Sharing

Tableset sharing enables you to share some or all of your control table data from business unit to business unit, instead of having to enter the same data multiple times. The key to sharing that information is determining which rows of data can be shared across business units, which should be shared across some business units but not others, and which should be restricted.

For example, you can centralize redundant information such as country codes in a set ID that is shared while keeping information such as departments and job codes decentralized amongst different set IDs. The goal of tableset sharing is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

Tablesets form the building blocks of your HCM system. You populate the individual tables in the tableset according to your particular business rules or processing options. You can also mix and match tablesets by updating tableset assignments for a business unit using the TableSet Control component (SETID_TABLE).

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You aren't required to share all tables in a tableset. With PeopleSoft HCM, you can share any combination of tables with any number of business units, according to your needs. Use the TableSet Control page to identify which data should be shared and how it should be shared for each business unit.

This diagram shows how one tableset is shared across all three business units in an organization for one group of records, the job code records, and for another group of records, the location records, each business unit uses it's own set ID. For the third group of records, salary plans, one table set is shared between two business units, ABC and QRS, but the third business unit, XYZ, uses the values created under another set ID:



Record Groups and Tableset Sharing

For the purpose of tableset sharing, control tables are divided into record groups. A record group is a set of control tables and views that use the same group of set IDs in the same manner.

Record groups serve two purposes:

- They save time by enabling you to set up tableset sharing without an enormous amount of redundant data entry.
- They act as a safety net by ensuring that tableset sharing is applied consistently across all related tables and views in your system.

A record group can contain a single table or many tables and views. You can update or modify which tables and views are included in each record group by using the Record Group component.

Business Units and set IDs

When you create a business unit, you must assign to it a default set ID. You have two options:

- If you want to create rows of data in the control tables that should be used only by this new business unit, create a set ID for the business unit when you create the business unit.

  You can create a set ID at the time you create a business unit by accepting the business unit code in the **Set ID** field. When you do this, the system creates a record set ID on the TableSet IDs component when you save the business unit.

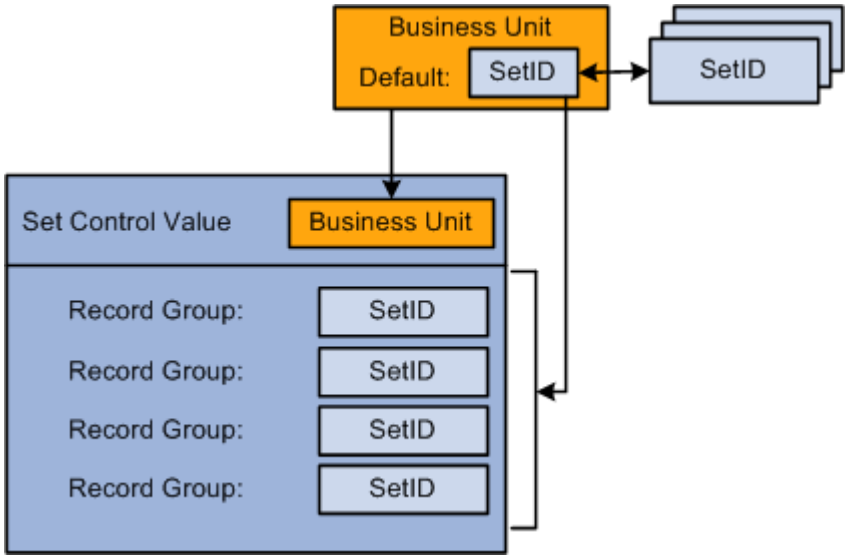
  > **Note**
  >
  > This is the best option if you are only using one business unit.

- If you want the business unit to share rows of table data (tableset sharing) with other business units, select the existing set ID that is or will be associated with the data rows you want to make available to this business unit.

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Regardless of which option you choose, when you save the business unit the system creates an entry in the Tableset Control component for that business unit and associates with each record group the default set ID you selected for the business unit. You can change the set ID assignment in the TableSet Control component.

This diagram shows the relationship between set IDs and business units and illustrates the information the system creates for the business unit in the TableSet Control component where you can change some or all of the set ID assignments:



Setting Up TableSet Sharing

Setting up tableset sharing is easy. Use tableset controls to make data available across business units or restrict to certain business units. Before you set up tableset controls, create:

- Record groups
- Business units
- Set IDs

When you create and save a business unit, the system creates a record in the TableSet Control component for the business unit (the Set Control Value) and populates the set ID for each record group with the set ID you selected for the business unit. If you want the business unit to have access to the rows in other set IDs for certain record groups, change the default set ID to the appropriate set ID. This means that a lot of tableset sharing setup is done for you behind the scenes.

Controlling Data Sets

The system filters the field options available to the user in the transaction components based on the tableset controls you set up. For example, when a user is creating a job data record for a new worker and selects the drop down list for the **Job Code** field, the system filters the available options by determining the following:

1. What business unit is this person's job data record in?

   USA

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2. What table controls data for this field (Job Code)?

   JOBCODE_TBL

3. What record group is that table in?

   HR_02

4. What set ID is assigned to that record group for this business unit?

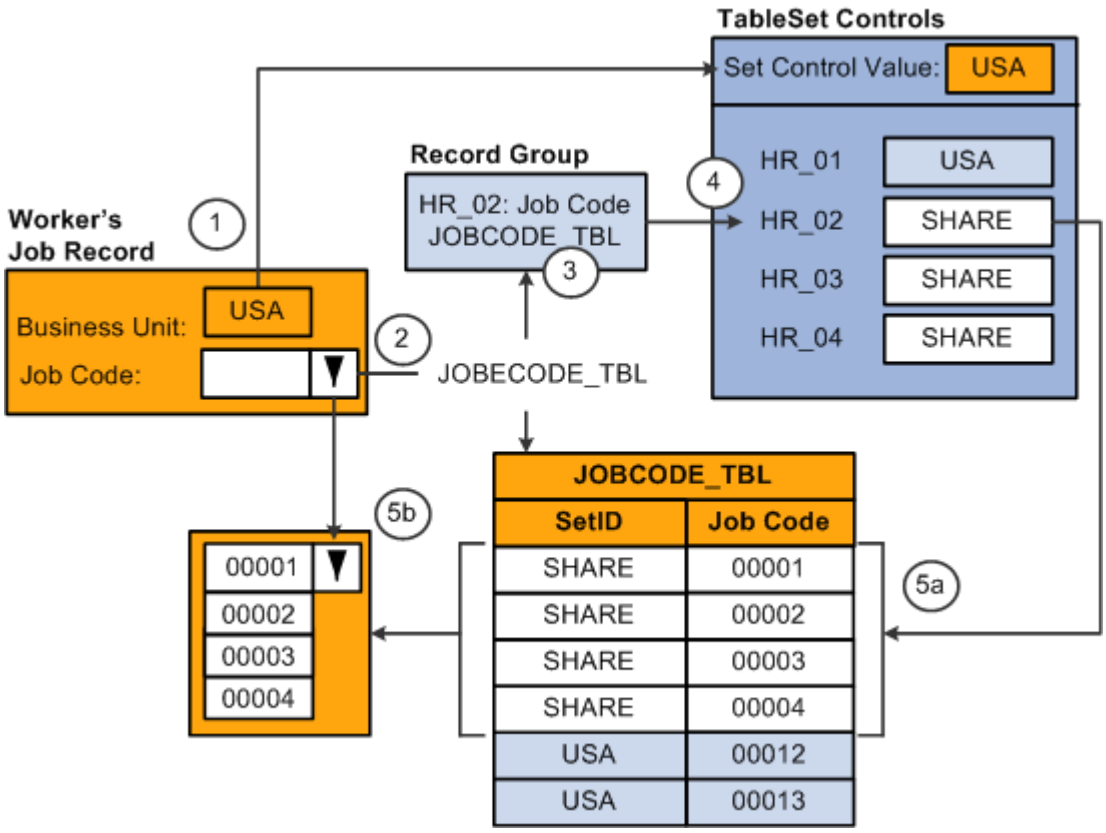
   SHARE

5. What rows in the control table (Job Code Table) are keyed by that set ID?

   a. The system looks only for the job code with the SHARE set ID values.

   b. The system makes available to the user only the rows keyed by the SHARE set ID.

This diagram shows the tableset controls for the USA business unit and illustrates how the system determines which job code values to display for that business unit, as described above:



If the user were accessing a field whose control table was in record group HR_01, the system would display the values keyed by the set ID USA from the corresponding control table. The data the system makes available to the user depends on the set ID specified in the TableSet Control component for the record group that contains the control table the user is accessing.

Referencing Multiple Set IDs

Occasionally, some pages have references to more than one set ID. It's important to understand how the Page Processor works through such a situation when you're working with set ID functionality. This will help you to understand how the system is making decisions about default values in the data record.

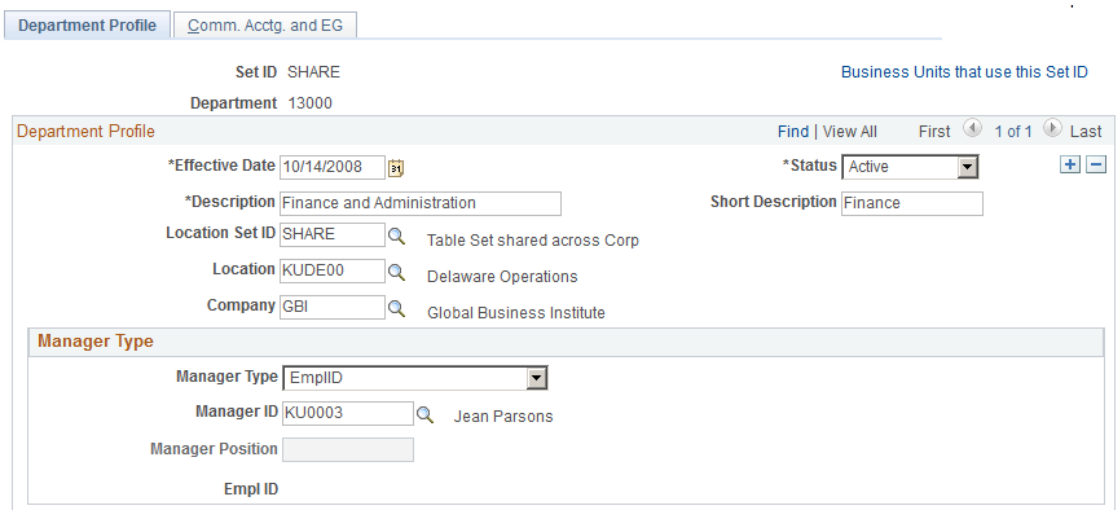
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Two scenarios exist in PeopleSoft HCM where a table that is keyed by one set ID also has fields that prompt onto another set ID table:

Scenario 1: A Control Table with Multiple Set IDs, but No Defaults Based on Those Set IDs

An example of a control table that is associated with multiple set IDs is the Departments component (DEPARTMENT_TBL). The record for the component, DEPT_TBL, has two set IDs: the set ID for the department and the set ID for the department's location. The set ID for the location prompt comes from the LOCATION_TBL record.

This example illustrates the Department Profile page.



In this situation where this is a department set ID and a location set ID, you can set up the component so that the system makes available in the Location field:

- All locations from all set IDs.
- Locations that share the same set ID and the department's set ID.

Making all locations available may cause problems if a user creates a department with a location in a set ID that is not used by any business unit with access to the department's set ID. Making only one location set ID available could cause problems if business units with access to the department's set ID use different location set IDs.

For example, an organization has the following tableset controls set up for its four business units for the DEPT and LOCATION record groups:

Business Units	PDEV	EURO	ASIA	RUSS
Record Group: DEPT	USA	EURO	USA	EURO
Record Group: LOCATION	USA	EURO	ASIA	RUSS

> **Note**
>
> Set up tableset controls on the Tableset Controls component.

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If you limited the location set ID to the set ID of the department, you would not be able to set up departments with a valid location for the *ASIA* and *RUSS* business units. If you made all locations in all set IDs available, you run the risk of users creating a department in set ID *USA* with a location in set ID *EURO.*

To limit the locations available to a department, while still accommodating the different tablesharing arrangements, you could limit the location set IDs to *USA* and *ASIA* when the department set ID is *USA* and to *RUSS* and *EURO* when the department set ID is *EURO.*

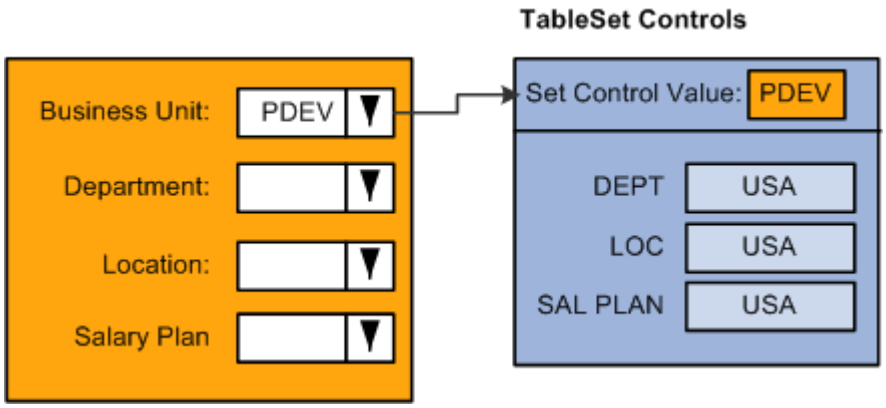
Scenario 2: A Transaction Table with Multiple Set IDs Controlling Defaults Across the Transaction Record

An example of a transaction table that has multiple set IDs controlling defaults across the record is the Job Data component (JOB_DATA).

When you create a job data record for someone, you select a business unit on the Work Location page (JOB_DATA1). The system uses the business unit's tableset controls to determine which values to make available in other fields on the component and when to use established defaults.

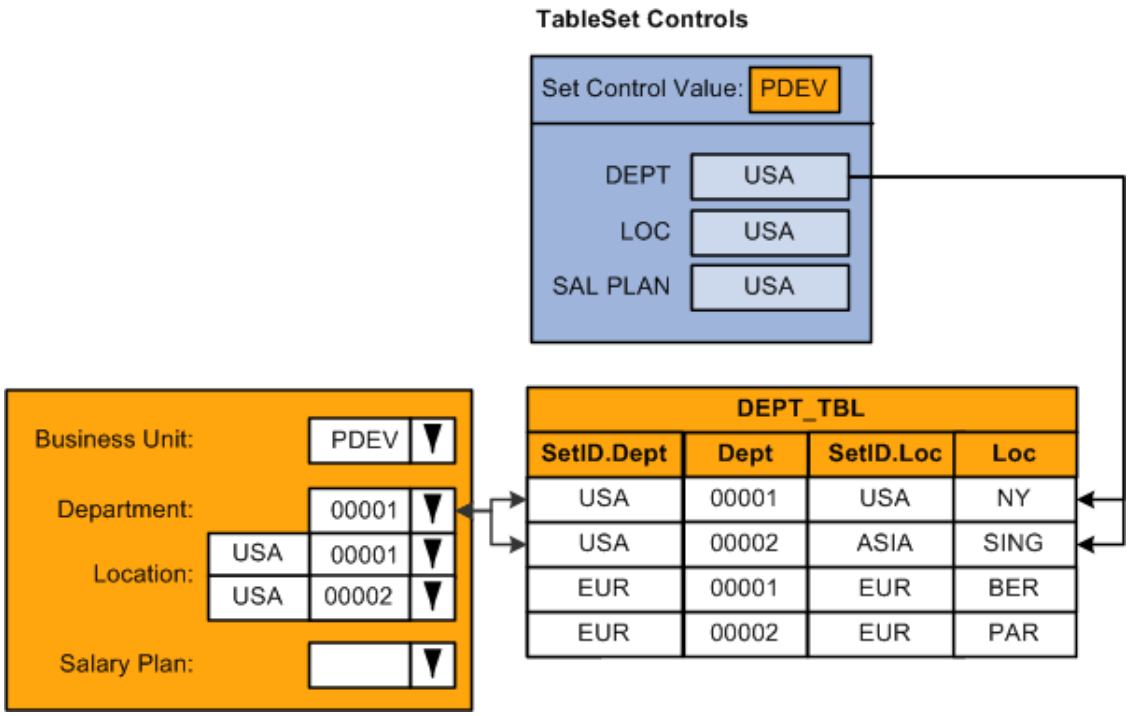
The system only displays departments that are in the set ID selected for the business unit and defaults in the department's location only if the location is in a valid set ID for the business unit. Locations have associated salary plans, and the system defaults in the location's salary plan only if the salary plan is in a valid set ID for the business unit. If a default value is not in a valid set ID for the selected business unit, the system leaves the field blank and the user selects a value from the options in the valid set ID.

For example, in the Job Data component, select the business unit, such as PDEV as shown in this diagram. The system references the tableset controls for that business unit to determine the valid set IDs for many of the other fields on the component, such as **Department, Location,** and **Salary Plan**:



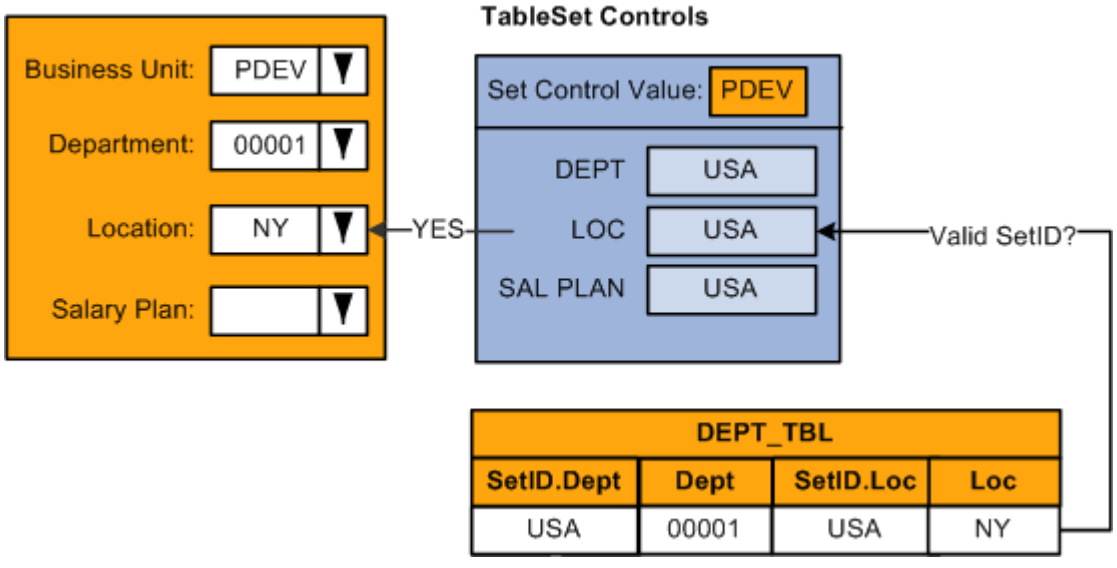
When you select the Department lookup button in the Job Data component, the system references the TableSet Control table for the record group row that determines which department set ID is available for this business unit. Since USA is the designated set ID for the department record, the system only displays in the search list those departments with the USA set ID. In the diagram below this would be departments USA-00001 and USA-00002:

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The system also checks to see if the set ID of the location associated with the department is valid for this business unit.

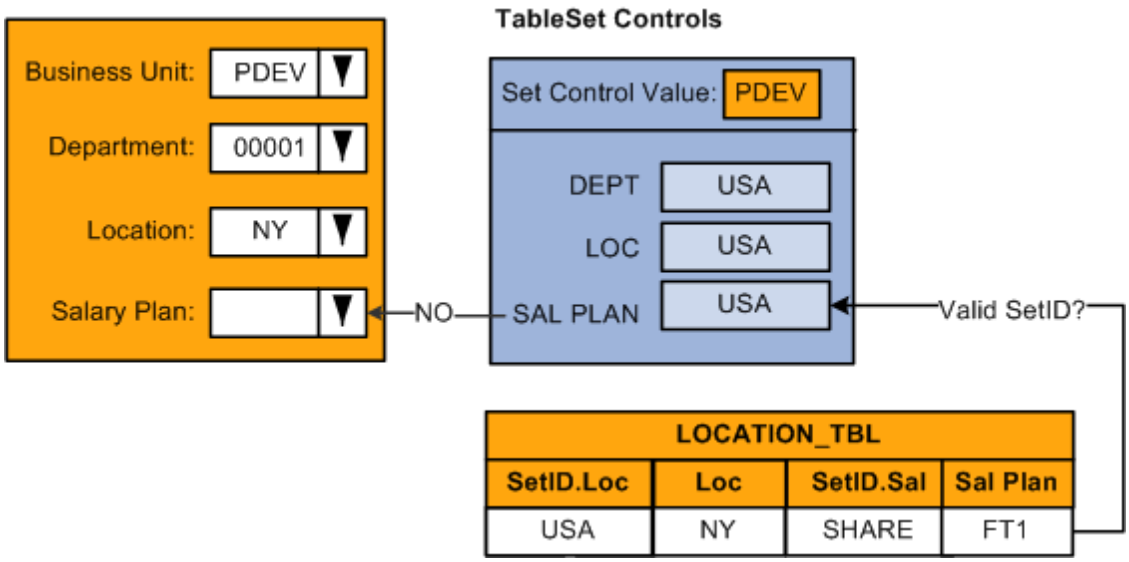
In this example, only locations with the set ID USA should be valid for the PDEV business unit. When the location associated with the department uses the set ID USA, such as department USA-00001, which is associated with location USA-NY, the system enters the default location in the **Location** field. If you were to select department USA-00002, the location associated with this department, with the set ID ASIA, will not default into the **Location** field. The system leaves the **Location** field blank:



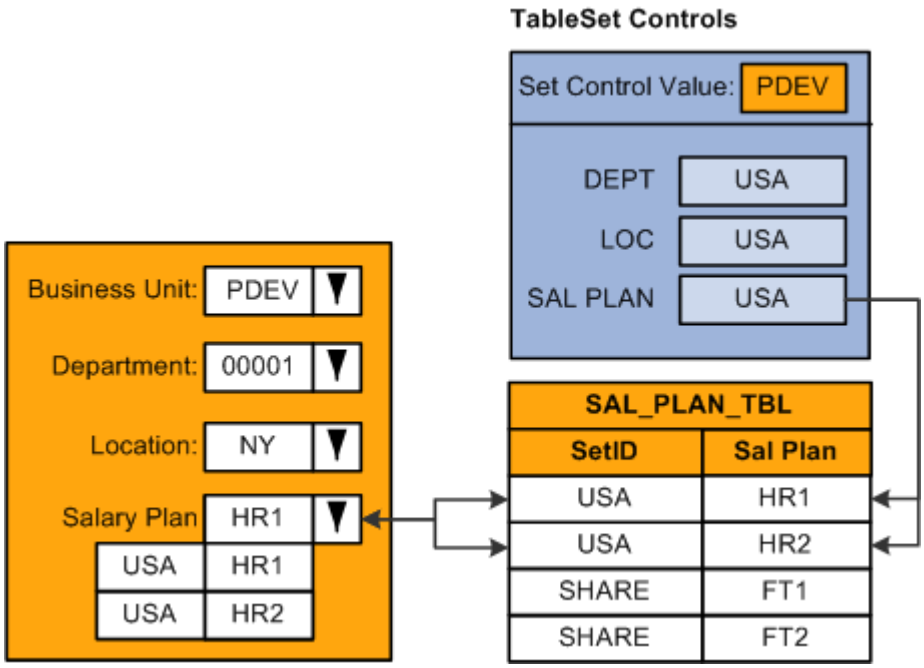
If the salary plan is associated with the location, the system checks the TableSet Control record for the business unit, in this example PDEV, to see if the set ID of the salary plan

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associated with this location is valid for this business unit. Since valid values for this business unit should be associated with the USA set ID, and the salary plan associated with the USA-NY location uses a salary plan set ID of SHARE, the salary plan will not be provided by default into the worker's record:



When you select a salary plan, the system will only retrieve those rows from the Salary Plan table that begin with set ID USA, as defined on the tableset controls for business unit PDEV:



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> **Note**
>
> Many of the set ID driven control tables enable you to review which business units have access to the selected set ID so that, as you set up your control values, you can confirm that they will be available to the appropriate business units.

Working with Permissions Lists and System Defaults

These topics discuss how to:

- Link to permissions lists.
- Define business unit HR defaults.
- Determine system default values.

Linking to Permission Lists

PeopleSoft security is based on building blocks called permission lists. Permission lists grant users access to applications, functionality, menus, data, and so on. Most permission lists are grouped into roles and the roles are granted to users. However, there are four permission lists that control specific aspects of the application that are assigned directly to the user profiles.

One of these permission lists, the primary permission list, determines which default values the system enters for the user (among other things). On the Org Defaults by Permission List component (OPR_DEF_TBL_HR) set up primary permission lists with:

- Default values for the following fields:
  - **Business Unit**
  - **Set ID**
  - **Company**
  - **Country**
  - **Regulatory Region**
  - **To Currency**
  - **Currency Rate Type**
- Application settings, such as the payroll system and industry.

When a user logs onto the system, the system references the user's primary permission list to determine which settings to apply and which values to enter as defaults on components that support primary permission list defaulting. This helps to ensure that users are entering the right information for the kind of work that they do.

> **Note**
>
> Not all components use the defaults from the primary permission list.

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> **Warning**
>
> Not associating system users with permission lists can result in serious data errors in PeopleSoft Human Resources.

For more information, see product documentation for *PeopleTools: Security Administration*.

Related Topics

- Understanding PeopleSoft Security
  PeopleSoft security is based on permission lists and roles.
- Understanding Data Permission Security for HCM
  Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

Defining Business Unit HR Defaults

When users access an HCM component, the system populates some of the fields, such as business unit, company, and country using the values you associated with the user's primary permission list. You can also associate default values with set IDs on the Business Unit Options Defaults page (BUS_UNIT_OPT_HR).

Using the tableset controls and business unit default options you set up, the system determines the default values to enter in select fields on the transaction component. The system uses these defaults only on components where the system identifies the business unit field as a source for default values.

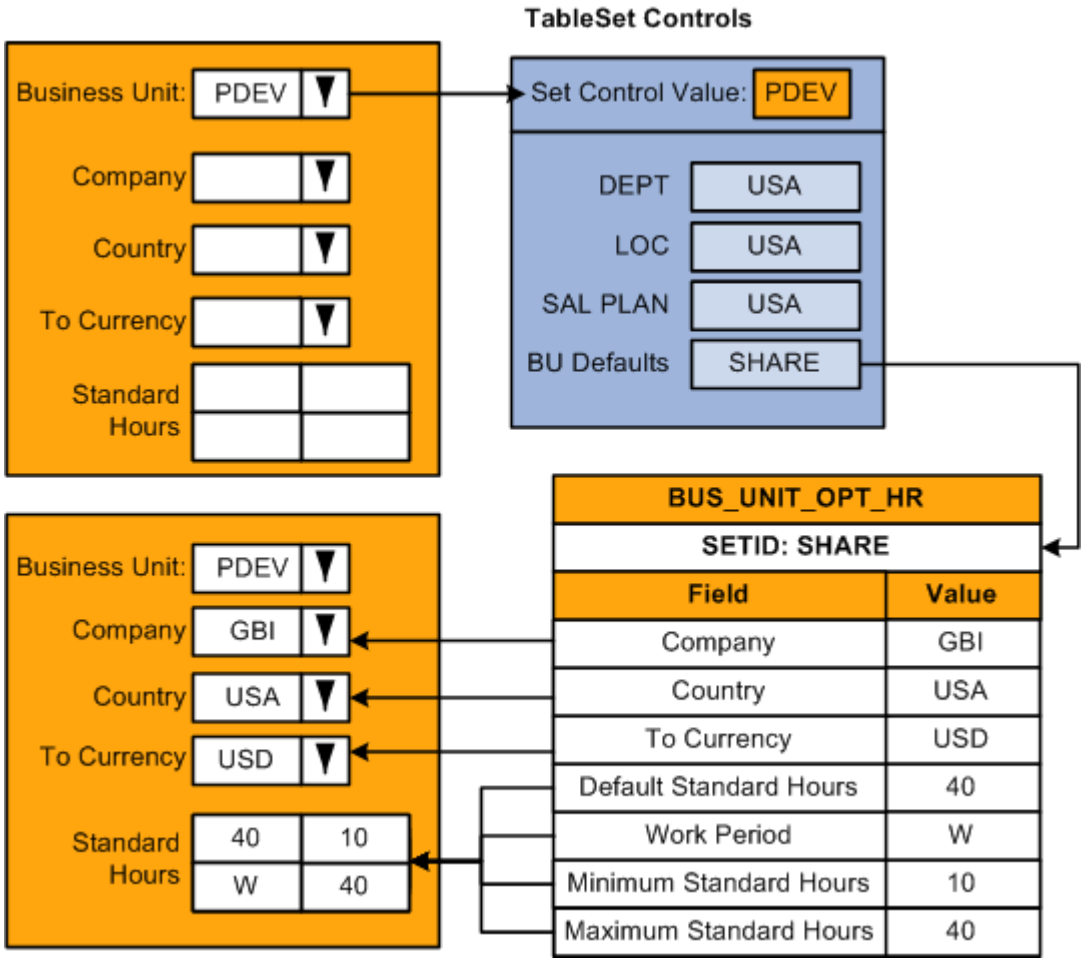
To set up business unit defaulting:

1. On the Tableset Control – Record Group page (SET_CNTRL_TABLE1), select the set ID that controls business unit defaulting for this business unit.

   This enables you to share defaulting rules across business units.
2. Enter the set ID's default values on the Business Unit Options Defaults component.

When a user accesses a component, which is driven by business unit defaulting, and selects a business unit, the system determines which set ID drives defaulting for that business unit by referencing the record group BU Defaults on Tableset Control table. For example, for business unit PDEV, the set ID for the record group BU Defaults row is SHARE. The system references the Business Unit Options Defaults component for set ID SHARE to retrieve the default values and then enters those values in the transaction component, as this diagram illustrates:

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> **Note**
>
> The record group containing the Business Units Options Default record (BUS_UNIT_OPT_HR) is HR_06.

Setting up business unit defaults on the Business Unit Options Defaults page makes sense when you have multiple business units that share the same kind of defaults; but shared defaults are not readily organized by permission list but rather set ID.

Determining System Default Values

Most of the page-level defaults in the PeopleSoft HCM system are based on the primary permission list as opposed to business unit. Business unit defaulting generally only occurs on components that are driven by the business unit or that use EmplID as a high-level key.

This table lists the four most common scenarios in which the system must determine which default values to use, either the defaults that you defined on the Business Unit Options Defaults component or on the Org Defaults by Permission List component:

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On the Component	How the System Determines Defaults
Select a business unit.	The system enters the default values from the Business Unit Default Options component.
Select an EmplID value, but no business unit value.	The system determines the person's business unit by checking the person's JOB record for that EmplID/ERN combination and then enters the default values from the Business Unit Default Options component.
The component does not have either the Business Unit or EmplID fields.	The system enters the default values from the Org Defaults by Permission List component.
The component uses a set ID without an associated business unit or EmplID value. (This is the situation on most setup and control components, such as the Location and Department components.)	The system enters the default values from the Org Defaults by Permission List component.

Warning

The paradigm above isn't strictly followed in the system and should be used as a guideline *only.* Actual defaulting at the page level is governed primarily by page functionality.

Note

Some degree of flexibility has been incorporated for exceptions to those pages that don't fall into either of these categories.

For more information, see product documentation for *PeopleTools: Security Administration* and *PeopleTools: Data Management*.

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4

Working with Regulatory Regions

Understanding Regulatory Regions

The Regulatory Region functionality in PeopleSoft Human Resources is for use in performing regulatory and regional edits. You use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the user sees.

A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing. These requirements include areas such as ethnicity, disability, and health and safety. When driven by Regulatory Region, the regulatory codes, PeopleCode edits, and set processing in the system can vary by country and for each transaction.

When your system users enter data into PeopleSoft Human Resources, you want them to use the codes and data that are applicable to the regulatory region that they are working with. Using the Regulatory Region feature helps ensure that your users focus on the correct data sets, making their data entry faster and more accurate.

This functionality is especially helpful for organizations that have a multinational workforce. Consider the following examples where the Regulatory Region concept would be useful for organizing your business data:

- An employee officially works in the U.S., but has a health and safety-related incident occur during a business trip in Canada. Using Regulatory Region in the Incident Details component, your users work with incident data and codes (body parts, dangerous occurrences, diagnosis codes, and so forth), that are applicable to the country in which the incident occurred.
- Your organization has implemented PeopleSoft Benefits Administration and would like to use its automatic eligibility processing capabilities to determine the benefits enrollment options for your U.S. and Canadian employees. Because benefits rules in Canada and the United States vary, you can use the Regulatory Region on the Eligibility Rules table to set up two sets of benefits eligibility rules: one set for your Canadian workers and another for your U.S. workers.

Understanding Regulatory Region Table Relationships

Use the following pages to review and set up Regulatory Region controls for your system:

- Regulatory Region (REG_REGION)
- Transaction (REG_TRX)
- Regions in Transaction (REG_TRX_REGION)

Use the Regulatory Region page to view or modify existing regulatory regions and to establish additional regulatory regions. The regulatory regions you create can be based on countries or regions within countries, such as states or provinces.

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Use the Transaction page to view and modify existing transaction types or to establish and describe new regulatory transaction types.

Use the Regions In Transaction page to view and modify the regulatory regions that define existing regulatory transaction types and to establish the regions that define the new transaction types that you create.

The following table shows the relationships between the regulatory region pages that you use to define and administer regulatory regions in PeopleSoft Human Resources:

REG_REGION_TBL >	REG_TRX_REGION <	REG_TRX
REG_REGION	REG_TRX	REG_TRX
DESCR50	REG_REGION	DESCRLONG
COUNTRY		
REG_AVAIL		

These pages do not have an Effective Date or an Effective Status. Both REG_REGION_TBL and REG_TRX have Related Language tables. You can hide data that you don't want by either making the REG_AVAIL = NOT or removing it from the transaction's region list.

> **Note**
>
> During configuration, you must create regulatory regions before you can create transactions and establish the relationship between them. A regulatory region can be used by many transactions.

Establishing Regulatory Regions

While the system is delivered with defined regulatory regions, you might want to add new regulatory regions if you have operations in additional countries. Or you might want to create additional regulatory regions that correspond to regions within countries, such as states or provinces, that impact the way your company does business. For example, you might want to set up regulatory regions for each state in the United States, if you thought that significant regulatory codes or data definitions would vary from state to state. Use the Regulatory Region page to establish these additional regulatory regions.

> **Note**
>
> You don't have to create new regulatory regions. You create new regulatory regions only if there is a special need, perhaps to accommodate specific local regulations. You do have to use the existing regulatory regions that are already in the system. If you have operations in only one country, and you want to limit the impact of Regulatory Region on your data entry users, then you can assign your one region as the default region in the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).

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> **Note**
>
> Although the scope of a regulatory region can be smaller than a country, PeopleSoft recommends that the standard Regulatory Region be at the country level.

To simplify matters and provide consistency, we recommend that you use the following naming standard when creating new regulatory regions:

- For new country-level regulatory regions, use the 3-character, ISO-certified country code found in the Country Table component (COUNTRY_TABLE).
- For regions that are smaller than a country, use the 3-character country code and concatenate a 2-character unique regional identifier. For example, use *CCCSS* for state-level or province-level regions, where *CCC* is the country code and *SS* is the state or province code. Using this system, the regulatory region code for Canada - British Columbia is *CANBC.*

Related Topics

- Establishing Regulatory Transaction Types
  To establish regulatory transaction types, use the Regional Transactions component (REG_TRX_REGION).

Associating a Regulatory Region with a Transaction

These topics provide an overview of regulatory regions and transactions and discuss how to:

- Maintain regulatory regions.
- Use regulatory regions for transaction processing.
- Establish default regulatory regions.
- Assess the impact on PeopleCode transaction processing.
- Create prompt edit transaction views for REG_REGION.
- Add REG_REGION to human resources transactions.

Understanding Regulatory Regions and Transactions

Regulatory Region is used as a control field on pages throughout your PeopleSoft Human Resources system. It is almost always a required field.

PeopleCode is used to associate the desired Regulatory Transaction type or view with the specific transactions that are processed on a page. Regulatory Region fields have an edit prompt off the transaction specific view. The view displays to a user only those countries that are available for that Regulatory Transaction type and for which the user has security access.

A system of standard defaults assists the user in selecting the appropriate regulatory region and transaction.

> **Note**
>
> Usually you can override the defaults to ensure that the proper regulatory region is assigned to a transaction.

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Maintaining Regulatory Regions

The size and definition of a regulatory region can be smaller or larger than a country, varying by the transaction or application. However, the standard region is a Country Code.

You can create additional transaction or application views that display only the applicable regions for that transaction. Place the Regulatory Region field on that transaction record and define an edit prompt in the transaction-specific view. The view should display only those countries that are available to the user (either *Available to All* or *With Global Security Only,* joined with user Global Security). For example, the following table shows some regulatory regions that are already in the system:

Transaction Type	Reg Region (Char 10)	Description (Descr)	Country Code (Alt-Search)	Security Availability Status
Standard	BEL	Belgium	BEL	With Global Security Only
Health and Safety	BEL	Belgium	BEL	
Standard	CAN	Canada	CAN	Available to All
Health and Safety	CANBC	Canada - British Columbia	CAN	
Standard	DEU	Germany	DEU	Available to All
Standard	FRA	France	FRA	Not Available to Anyone
Standard	GBR	UK	GBR	With Global Security Only
Standard	JPN	Japan	JPN	Not Available to Anyone
Standard	NLD	Netherlands	NLD	Not Available to Anyone
Health and Safety	QC	Canada - Quebec	CAN	
Standard	USA	United States	USA	Available to All

You can add regulatory regions for your own configuration. For example, you can add the 50 U.S. states and differentiate at that level for most transactions.

Using Regulatory Regions for Transaction Processing

The system identifies the general regulatory region for a person by looking at the current effective Job Data record for each EmplID and employee record number combination.

For PeopleSoft Human Resources business process functions that need a different regulatory region for a transaction than is generally associated with a person, add Regulatory Region to that transaction. Use a Transaction view (normally STANDARD) from the Regulatory Region table to provide the appropriate prompt of Regulatory Regions for that transaction.

Once REG_REGION is in a page buffer, you can perform regional edits and set processing.

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> **Note**
>
> Be sure to use the Country field (related display) of the region for all country specific edits to ensure that the user can go to a finer level of detail for other edits.

Establishing Default Regulatory Regions

Regulatory Region is almost always a required field. The system establishes the default Regulatory Region in different ways, depending on the PeopleSoft Human Resources business process. You can always override these defaults. The following table lists the components that default a Regulatory Region value and the pages the value defaults from.

Component	Default regulatory region value from:
Position Data (POSITION_DATA)	Org Defaults by Permission Lst
Job Data (JOB_DATA)	Position Data (if the worker is assigned to a position) *or* Org Defaults by Permission Lst (if the worker is not assigned to a position)
Incident Details (HS_INCIDENT)	Org Defaults by Permission Lst
Disability (DISABILITY)	Job Data
Establishment (ESTABLISHMENT_DATA)	Org Defaults by Permission Lst
Job Openings (HRS_JOB_OPENING)	Position Data (if the job opening is assigned to a position) *or* Org Defaults by Permission Lst (if the job opening is not assigned to a position)

Related Topics

- PeopleSoft Human Resources Monitor Health and Safety: Understanding Health and Safety Incidents
- Setting Up Primary Permission List Preferences
  To set up primary permission list preferences, use the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).
- PeopleSoft Human Resources Administer Workforce: Tracking Disabilities
- Defining Establishments
  To define establishments, use the Establishment (Define Establishment) component (ESTABLISHMENT_DATA) and Controlled Establishment Sumry component (CONTROLLED_ESTABS). Use the ESTABLISHMENT_DATA component interface to load data into the tables for the Establishment component.
- PeopleSoft Human Resources Manage Positions: Creating Positions

Assessing the Impact on PeopleCode Transaction Processing

Most transactions involve the Regulatory Transaction type STANDARD. The system performs PeopleCode edits against the person's Regulatory Region in the Job Data component and establishes the appropriate transaction PeopleCode that the system should apply to page processes, based on the regulatory region that you enter.

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> **Note**
>
> The Regulatory Region field is required on the Job Data pages. On the Job Data pages, you see only the STANDARD list of regulatory regions to which you have security access.

For Health and Safety transactions or incidents, the Regulatory Transaction type HANDS is used because it includes the Canadian provinces as regulatory regions. The Regulatory Region value on the Org Defaults by Permission Lst component appears by default on the Incident Data and Incident Reporting pages.

Creating Prompt Edit Transaction Views for REG_REGION

Because there are two types of transactions in PeopleSoft Human Resources (STANDARD for employee transactions and HANDS for Health and Safety transactions), there are two different

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prompt views for those transactions. When you add a transaction to your system, you include a new prompt view that can be built from the views that are included in the system.

```
REG_STANDARD_VW

SELECT

S.OPRID,

R.REG_REGION,

R.DESCR50,

R.COUNTRY

FROM PS_REG_REGION_TBL R,

      PS_REG_TRX_REGION  T,

      PSOPRDEFN S

WHERE T.REG_TRX = 'STANDARD'

AND T.REG_REGION =   R.REG_REGION

      AND (R.REG_AVAIL = 'ALL'

          OR (R.REG_AVAIL = 'GBL'

              AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G

              WHERE S.OPRID = G.OPRID

              AND G.COUNTRY = R.COUNTRY)))

REG_HANDS_VW

SELECT

S.OPRID,

R.REG_REGION,
```


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> **Note**
>
> You can create new transaction views by doing a Save As and changing the hard-coded transaction name.

Adding REG_REGION to Human Resources Transactions

The following two examples show how to associate regulatory regions with human resources transactions:

Example - Job Data

To associate REG_REGION to a person on the Job Data pages:

1. Add the **REG_REGION** field to the record JOB.
2. Make the **REG_REGION** field a required field.
3. After adding the field to the record, define a prompt edit from the standard view **(REG_STANDARD_VW).**
4. Add this field to the page **JOB_DATA1.**

Now, when you prompt on the **Regulatory Region,** you see only those Regulatory Regions to which you have security access.

Example - Health and Safety

We associated Regulatory Region with incidents in Health and Safety. Regulatory Region is a required field that controls the values that are returned by all the Health and Safety setup pages that have Set ID as their primary key. For example, if the Regulatory Region for an incident is specified as GBR (United Kingdom), then only GBR codes for Dangerous Occurrences appear on the Incident Details - Description page (HS_INC_DESCRIPTION). Health and Safety incidents have REG_HANDS_VW as the prompt edit.

> **Warning**
>
> All linked setup values for an incident must belong to the same regulatory region. If the Regulatory Region is altered (such as when you are operating in update/display mode), and the Set ID for the new Regulatory Region is different from the original, all linked setup fields and values are deleted to prevent inconsistent data. For example, the Set ID for the Regulatory Region USA is *USA,* and for GBR it is *GBR*, if the Regulatory Region for an already established *USA* incident is changed to *GBR,* then all of the linked details on the Incident Details pages are lost. The system prompts you that the Regulatory Region is about to be changed, and you can choose whether to proceed before the values are deleted or not.

In Health and Safety, the following Set IDs are mapped for each regulatory region, as shown:

Regulatory Region	Set ID
BEL	STD
CANAB	CAN

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Regulatory Region	Set ID
CANBC	CANBC
CANMB	CAN
CANNB	CAN
CANNF	CAN
CANNS	CAN
CANON	CAN
CANQC	CAN
CANSK	CAN
DEU	DEU
FRA	FRA
GBR	GBR
JPN	STD
NLD	STD
USA	USA

These regulatory regions were mapped to these Set IDs on the TableSet Control − Record Group page (SET_CNTRL_TABLE1).

All regulatory regions that have region-specific sets of codes or values in the Health and Safety system are mapped to a Set ID of the same name. This group includes CANBC, DEU, FRA, GBR, and USA.

The other regulatory regions that aren't mapped to a Set ID of the same name fall into two additional categories. Except for British Columbia, the Canadian provinces have no specific provincial codes or values in the system and are mapped to the Set ID CAN.

All the other countries that are supported directly in PeopleSoft Human Resources and that don't have any region specific codes or values in the system are mapped to a generic Set ID value of *STD.* This group includes JPN, BEL, and NLD.

Additional Transaction Modifications for Regulatory Region

We've added Regulatory Region to the following PeopleSoft Human Resources components:

- Position Data, with REG_STANDARD_VW as the prompt edit.
- Job Openings, with REG_STANDARD_VW as the prompt edit.
- Establishment, with REG_STANDARD_VW as the prompt edit.
- Org Defaults by Permission Lst, with REG_STANDARD_VW as the prompt edit.
- Disability/Accommodation Request, with REG_STANDARD_VW as the prompt edit.

See PeopleSoft Human Resources Manage Positions: Creating Positions.

See PeopleSoft Talent Acquisition Manager: Understanding Job Openings.

See Defining Establishments.

See Setting Up Primary Permission List Preferences.

See PeopleSoft Human Resources Administer Workforce: Tracking Disabilities.

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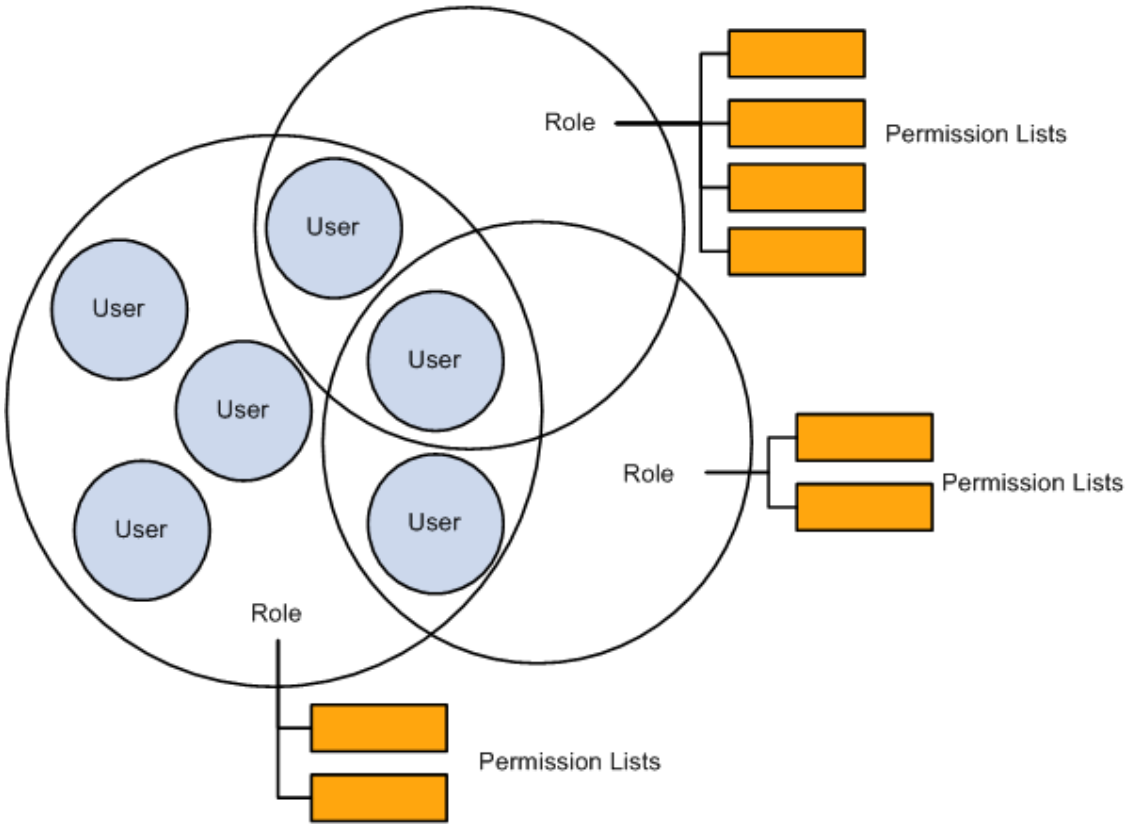
5

Setting Up and Administering HCM Security

Understanding PeopleSoft Security

PeopleSoft security is based on permission lists and roles.

This diagram illustrates how permission lists are assigned to roles and then roles assigned to user IDs to create user security profiles:



To administer security:

1. Create permission lists.
2. Create roles and attach permission lists to roles.
3. Create user IDs and attach permission lists and roles to user IDs.

Create Permission Lists

Create permission lists and assign to them access to menus, components, component interfaces, pages, global functionality, along with other information. Permission lists are assigned to roles; however, some permission lists are assigned directly to the user.

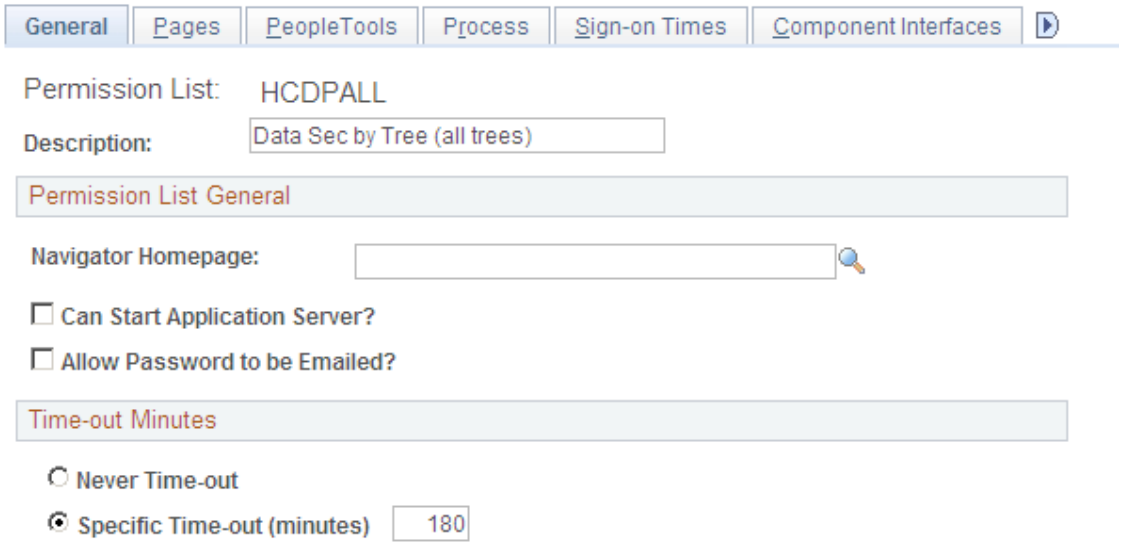
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Important

Be sure to start with a thorough analysis of your security requirements. For example, if a user has access to a position management page that uses a component interface to update the job data tables, then the user needs permissions for the job data component interface as well as for the position management page.

Create permission lists using the Permission Lists component (ACCESS_CNTRL_LISTX) or Copy Permission Lists component (PERMISSION_SAVEAS) by navigating to **PeopleTools**, and then **Security**, and then **Permissions & Roles** and selecting the appropriate permission list component.

This example illustrates creating permission lists in the Permission Lists component or Copy Permission Lists component.



Note

Assign data permission to permission lists on the Security by Dept Tree page (SCRTY_TABL_DEPT) and the Security by Permission List page (SCRTY_CLASS) by navigating to **Set Up HCM**, and then **Security**, and then **Core Row Level Security** and selecting the appropriate component.

See *PeopleTools: Security Administration,* "Setting Up Permission Lists".

Create Roles

Create roles and assign permission lists to the roles. The access you granted to the permission lists combines under the role. For example, you would assign the permission lists required by your workforce's managers to the role of Manager which, combined, give your managers security access to all elements of the system that managers need. Roles are assigned to the user.

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Create roles using the Roles component (ROLEMAINT) or Copy Roles component (ROLE_SAVEAS) by navigating to **PeopleTools**, and then **Security**, and then **Permissions & Roles** and selecting the appropriate roles component.

This example illustrates assigning permission lists to roles on the Permission Lists page (ROLE_CLASS).



See *PeopleTools: Security Administration,* "Setting Up Roles".

Create User IDs

Create user IDs and assign to user IDs roles and permission lists to give them access to the system as appropriate.

In addition to the permission lists assigned to roles, the following four specific permission lists are assigned directly to the user on the User Profile - General page (USER_GENERAL) by navigating to **PeopleTools**, and then **Security**, and then **User Profiles**, and then **User Profiles**, and then **General.** Unlike the permission lists assigned to roles, users can have only one each of these four permission lists:

- Navigator Homepage

  Navigation homepages are used by PeopleSoft Workflow.
- Process Profile

  Process profiles contain PeopleSoft Process Scheduler authorizations.
- Primary

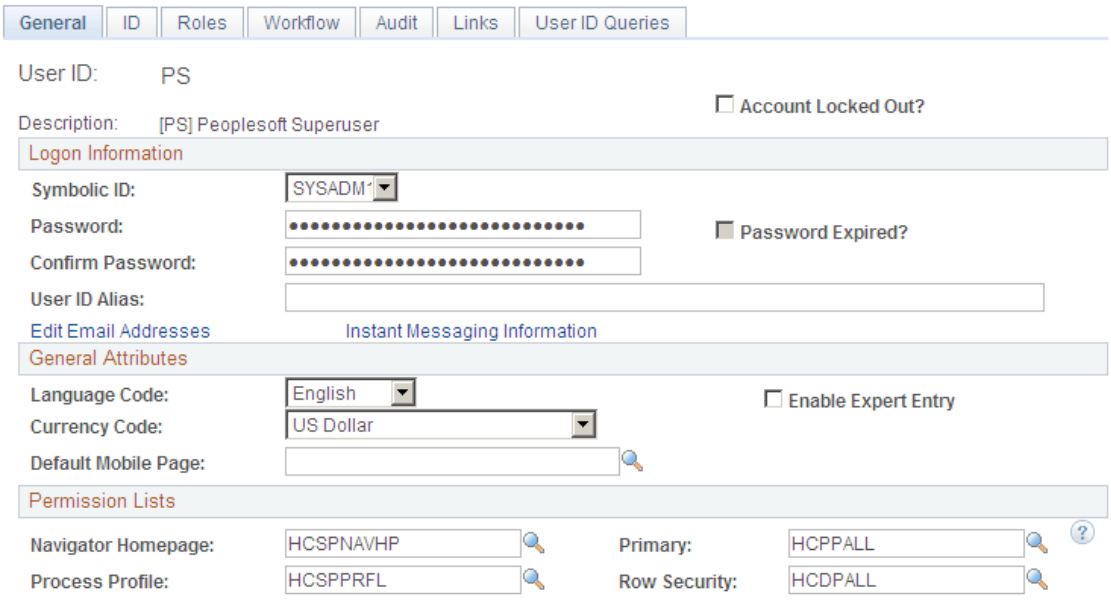
  Primary permission lists grant global security.
- Row Security

  Row Security permission lists grant data-permission security based on a department security tree. Assign data permission to permission lists on the Security by Dept Tree page.

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> **Note**
>
> On the Security by Permission List page you can assign data permission to permission lists that you attach to roles.

This example illustrates creating user IDs in the User Profiles component or Copy User Profiles component and assign the Navigator Homepage, Process Profile, Primary, and Row Security permission lists directly to the user profile on the General page.

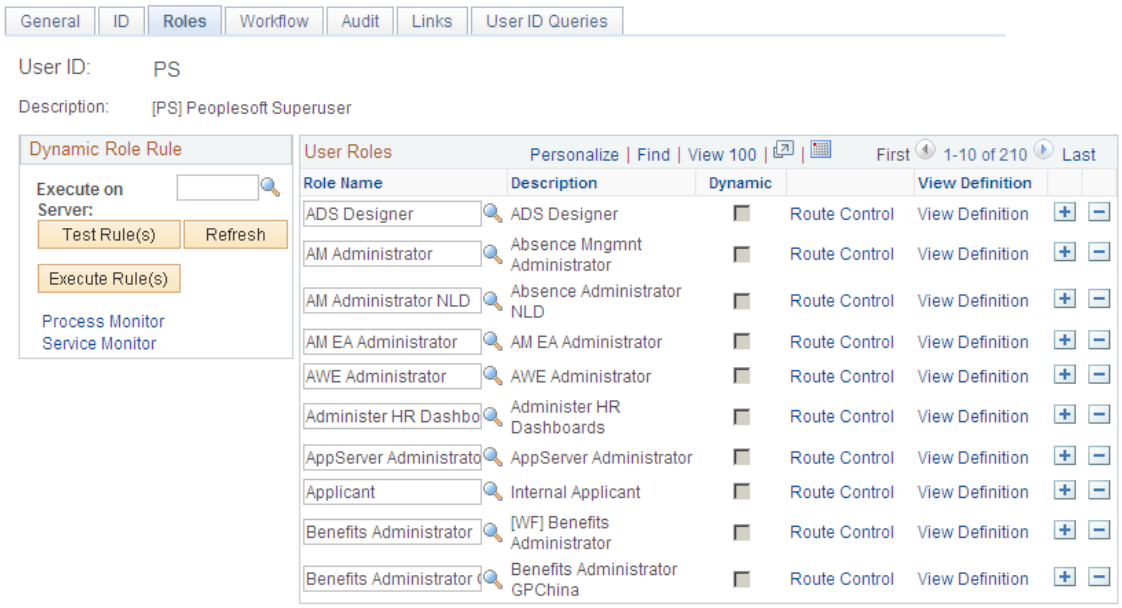


Roles and permission lists combine under the user ID to give users their security access. For example, the HR Training Manager would have the roles of manager, instructor, and employee to meet her access needs as a manager, instructor, and employee. Managers in different departments would have the same manager and employee roles, in addition to other roles that meet their needs.

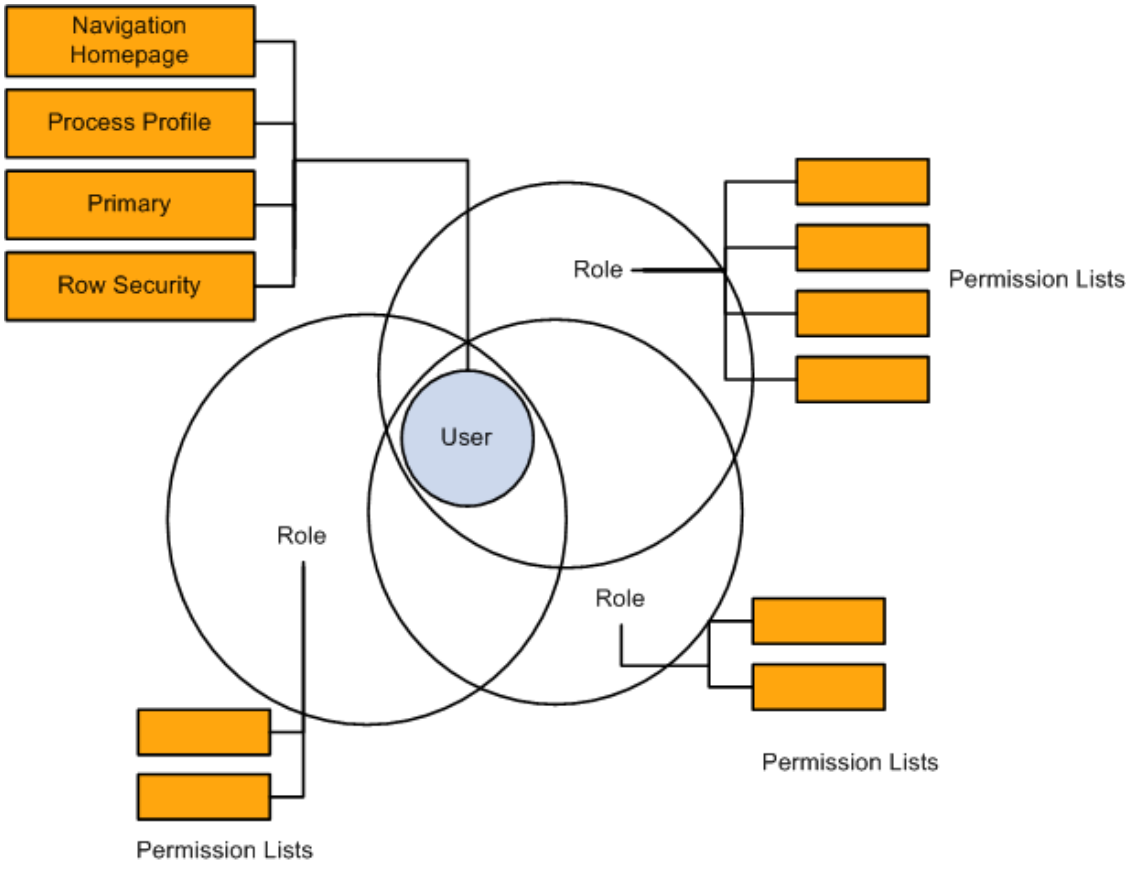
Assign roles to users using the User Profiles - Roles page (USER_ROLES) by navigating to **PeopleTools**, and then **Security**, and then **User Profiles**, and then **User Profiles**, and then **Roles**:

This example illustrates assigning roles to user IDs on the User Profiles - Roles page.

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This diagram illustrates how a user's security profile is made up of assigned roles, and the permission lists assigned to those roles, as well as permission lists assigned directly to the user:



See *PeopleTools: Security Administration,* "Administering User Profiles"

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Understanding Data Permission Security for HCM

Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

- People.
  - Employees.
  - Contingent workers.
  - People of interest (POIs) with jobs.
  - People of interest (POIs) without jobs.

> **Note**
>
> The data of people of interest without jobs is secured differently from the data of people with jobs.

- Recruiting job openings.
- Departments.

> **Note**
>
> Row security for departments secures department budgets and positions, if you are using Manage Positions. The Departments component is not secured by data permission so control access to department definitions by restricting access to the component or change the search record to DEPT_SEC_SRCH.

Data Security and Data Retrieval

The system enforces data permission security with security search views. To understand how this is done it helps to understand how the system retrieves data when you access a component.

When you open a component in PeopleSoft HCM the system displays a search page. The search page represents the search record and the fields that appear are the search keys and alternate key fields that uniquely identify each row of data. The system uses the information that you enter in the key or alternate key fields to select the rows of data that you want to view or manipulate (except for the Add action, where you enter a key and the system creates a new data row). For example, a search page may have **EmplID** as a key field and **Name** as an alternate key. If you enter *Smith* in the **Name** field, the system retrieves all data rows with **Name** field data that matches *Smith.*

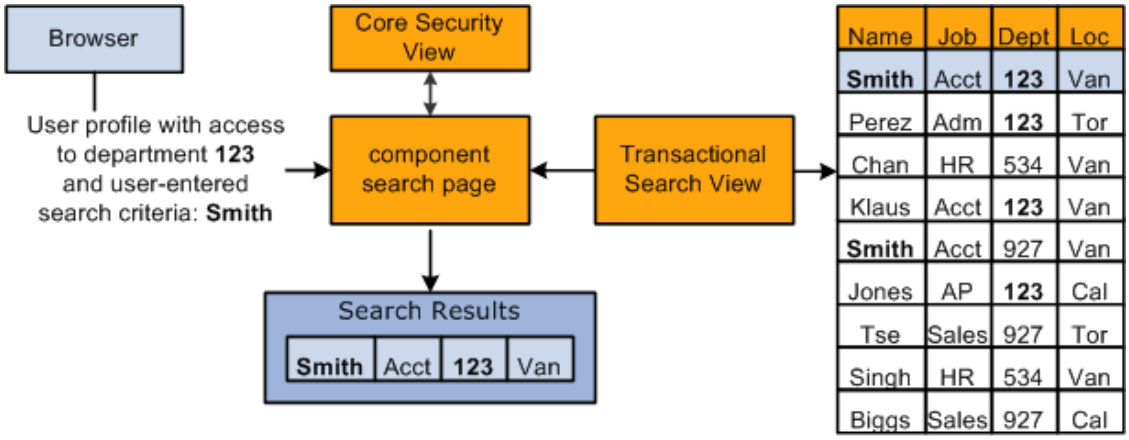
The system also uses search records to enforce data permission security. Search views for components that contain sensitive data also contain a security view to control data access.

The system adds the user's security profile, including their user ID and the values of the permission lists attached to their user profile, to the SQL (Structured Query Language) select statement along with the values that the user entered on the search page. The system retrieves the data that matches the criteria from the search page and the user's data

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permission lists. The system doesn't retrieve data for people to whom you haven't granted the user's permission lists data access.

Using the above example, if you enter *Smith* in the **Name** alternate key field, the system retrieves data only for the people with the name *Smith* to whom you have access, which are workers in department 123. Workers with the name of *Smith* outside of your security permission, department 123, are not retrieved or accessible to you as the user. This diagram illustrates the data retrieval process:



> **Note**
>
> Security for process and queries is enforced in much the same way.

Not all PeopleSoft HCM components require data permission security. Their security requirements can be met using application security (restricting access to the entire page, component, or menu). Only components containing sensitive information, such as salary information, use the security search views. If necessary, you can add data permission security to any component that accesses person data, as long as the search records are defined as SQL views (some search records are defined as SQL tables).

A component can have only one search record. To associate more than one search record with a component (for example, data level security for some users and not for others), you reinstall the component on different menus, one for each search record, and grant access to the appropriate component using application security.

Core Security Views

PeopleSoft delivers the following core security views for components tracking people:

Security Views for Components Storing All Person Types

Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	PERALL_SEC_SRCH	One row per EMPLID and distinct search items. Includes future-dated rows.

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Type	Includes Future-Dated Security	Security View	Rows Returned
SQR view	No	PERALL_SEC_SQR	One row per EMPLID.
Query view	No	PERALL_SEC_QRY	One row per EMPLID.

Security Views for Components Storing People With Jobs

Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	PERS_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.
Component search view	Yes	PERS_SRCH_EMP	One row per EMPLID for employees only. Includes future-dated rows.
Component search view	No	PERS_SRCH_CURR	One row per EMPLID.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID.
Query view	No	PERS_SRCH_QRY	One row per EMPLID.
Prompt view	No	EMPL_ACTV_SRCH	One row per EMPLID for people with current, active (as of the system date) job records.
Prompt view	No	WORKER_PROMPT	One row per EMPLID for employees and contingent workers with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People With Potentially More Than One Job Data Record

Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	EMPLMT_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.

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Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	EMPLMT_SRCH_EMPbe	One row per EMPLID and EMPL_RCD combination for employees only. Includes future-dated rows.
SQR View	Yes	FAST_SQRFUT_SEC	One row per EMPLID. Includes future-dated rows.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID and EMPL_RCD combination.
Query view	No	EMPLMT_SRCH_QRY	One row per EMPLID and EMPL_RCD combination.
Prompt view	No	PERJOB_PROMPT	One row per EMPLID for people with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People Without Jobs

Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	N/A	POI_SEC_SRCH	One row per EMPLID, POI_TYPE and distinct search items.
SQR view	N/A	POI_SEC_SQR	One row per EMPLID and POI_TYPE.
Query view	N/A	POI_SEC_QRY	One row per EMPLID and POI_TYPE.

See *PeopleTools: PeopleSoft Application Designer*

Security Data

Data permission is controlled on two sides: transaction and user.

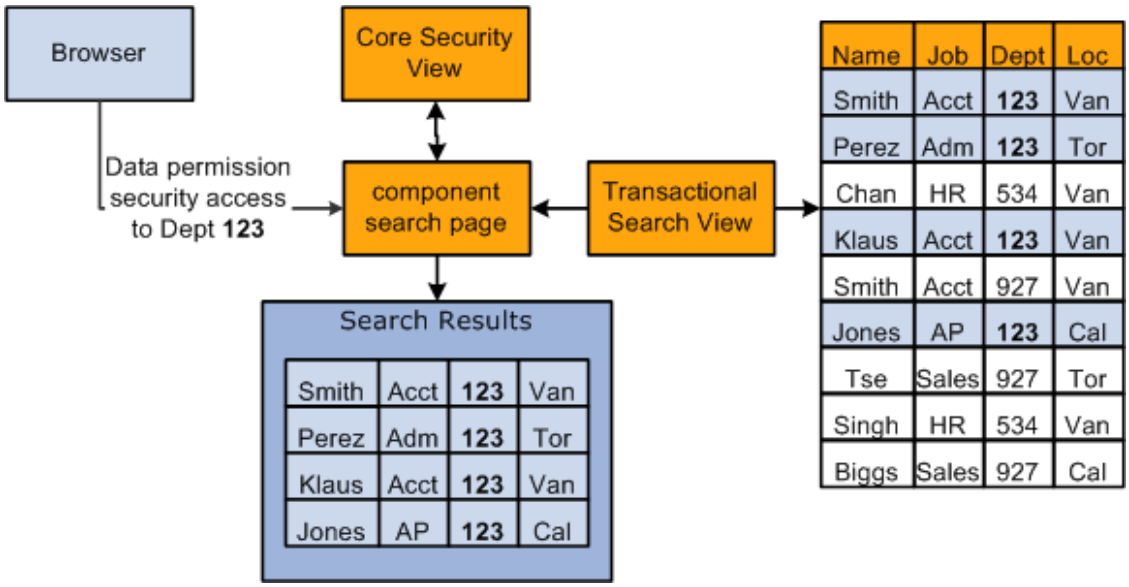
Transaction Security Data

Transaction data is the data that is being secured. Certain transaction fields on a transaction data row are used to secure access to that row. The data in these fields is called transaction security data. When the value of the transaction security data matches the value that a user can access (user security data), the system makes the entire row of data available to the user.

When the user accesses the component search page the security search view filters the data rows, displaying only the rows of data with the same transaction security values that the user has access to.

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This diagram shows the **Department** field being used as transaction security data to secure the data of people in the organization in which the user only has security access to the workers in department 123:



This table lists where you enter and maintain transaction data, to which record the transaction data is saved, and which fields can be used as transaction security data:

Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
Departments	Departments component (DEPARTMENT_TBL)	DEPT_TBL	• Set ID • Department
Job openings	Job Opening page (HRS_JO_360)	HRS_JOB_OPENING	• Company • Business Unit • DeptID • Location
• Employees • Contingent workers • POIs with jobs	• Add Employment Instance component (JOB_DATA_EMP) • Add Contingent Worker Instance component (JOB_DATA_CWR) • Add POI Instance component (JOB_DATA_POI) • Job Data component (JOB_DATA)	JOB	• Organizational Relationship (employee, contingent worker, or POI) • Regulatory Region • Company • Business Unit • Department • Location • Salary Plan • Pay Group (for customers using Payroll for North America)

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Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
POIs without jobs	• Add a POI Relationship component (PERS_POI_ADD) • Maintain a Person's POI Reltn component (PERS_POI_MAINTAIN)	PER_POI_SCRTY	• POI Type • POI Type and Business Unit • POI Type and Institution • POI Type and Company

Note

All people, regardless of type, are first entered in the Add a Person component (PERSONAL_DATA), where you enter their personal information and assign them an ID. These pages do not capture any transaction security data. Transaction security data is captured on the components that you use to enter details about the person's relationship to the organization.

Note

If you create a person but do not create 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.* Somebody in your organization must have data permission access to unknown POIs in order to access their data and create either a job data or POI type record for them, otherwise the data is inaccessible.

Make sure that users who enter people into the system understand the consequences of not *creating* and *saving* a Job Data or POI type record for new people at the time the person is entered in the system.

When a transaction record is successfully completed and saved 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 deletes the Unknown POI instance for that person.

See PeopleSoft Human Resources Administer Workforce: (Classic) Adding a Person.

See PeopleSoft Human Resources Administer Workforce: Controlling Data Access for POIs Without Jobs.

See PeopleSoft Human Resources Administer Workforce: (Classic) Adding Organizational Instances.

User Security Data

User security data is the data about a user's security access. It enables the system to ensure that users have access only to that which you have granted them access. User security data

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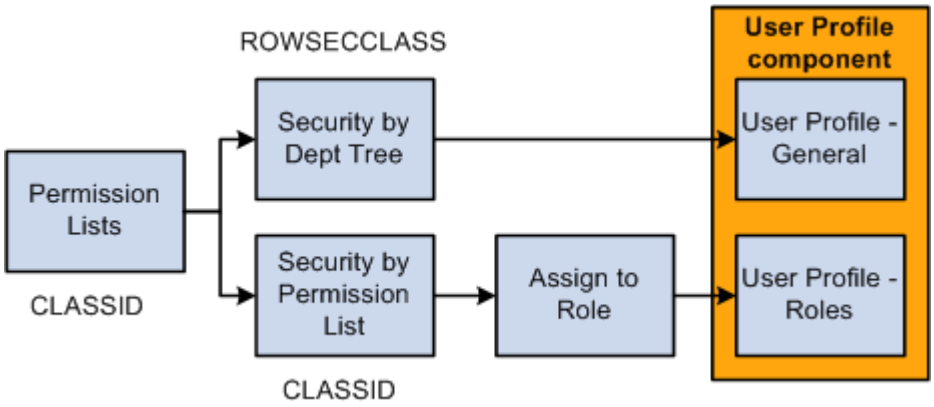
for HCM data permission is the data permission that you assign to permission lists and the roles and users to whom you assign the permission lists.

Data permission is granted to row security (tree-based) permission lists (ROWSECCLASS) and regular (role-based) permission lists (CLASSID). Both permission lists are created using the Permission Lists component and Copy Permission Lists component.

When you create a permission list on the Permission Lists component you can assign security to a number of different aspects of the application. Data permission is assigned separately on the Security by Dept Tree page and Security by Permission List page.

> **Note**
>
> When you add a permission list to the Security by Dept. Tree component, the system saves it as ROWSECCLASS.

This diagram shows that permission lists are created, assigned data permission (using either security by department tree or security by permission list), and then assigned to a user directly on the User Profile - General page as the Row Security permission list or assigned to a user on the User Profile - Roles page by assigning roles to the user, which are associated with permission lists:



This table lists the key differences between role-based permission lists with data permission and row security permission lists:

Row Security Permission Lists	Role-Based Permission Lists
Are assigned to users on the Row Security field on the User Profile – General page.	Are assigned to users by way of roles.
Are limited to one per user.	Users can have multiple role-based permission lists and the combined data permission access of each list.

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Row Security Permission Lists	Role-Based Permission Lists
Bring with them only the data permission assigned to the user on the Row Security field on the User Profile - General page.	Bring with them data permission access assigned to them on the Security by Permission List page and any application security access granted to the permission list on the Permission Lists component. The user will not have access to any data permission assigned to them on the Security by Dept Tree page.
Should have only department security tree-based security.	Can have only non-department tree-based security.

Note

You can use the same permission list as a row security permission list and a role-based permission list by adding it to both the Security by Dept Tree component and Security by Permission List component and then adding them to the user on the User Profile - General page and by way of roles.

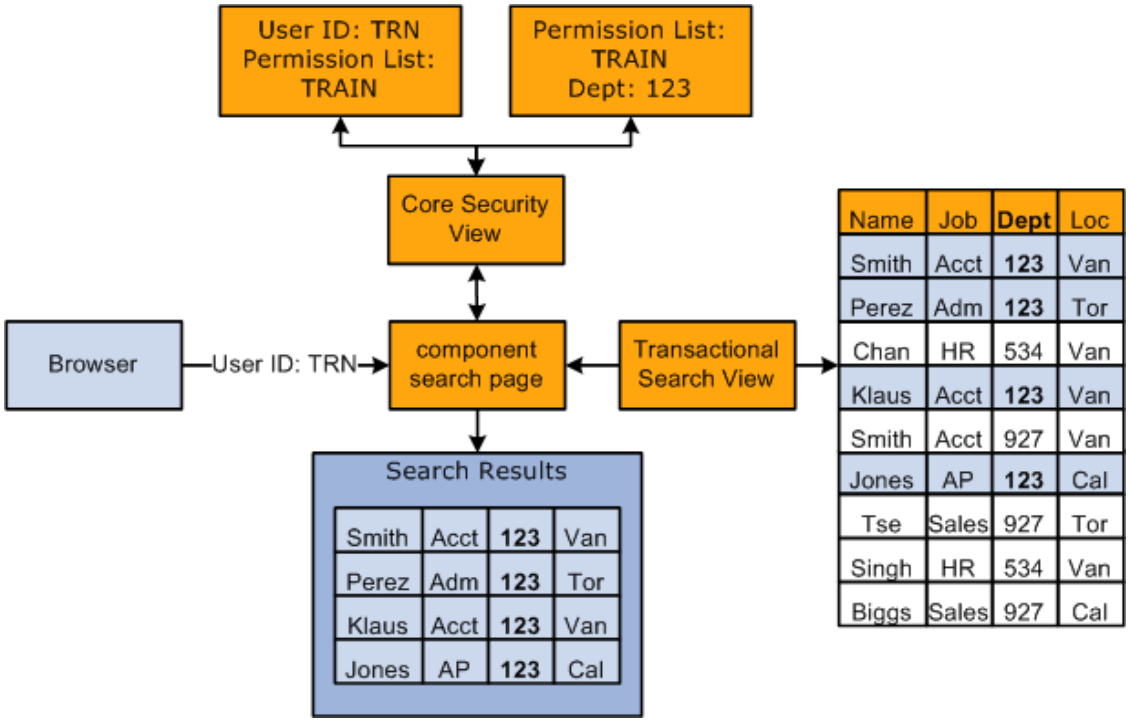
Note

The system recognizes non-tree based security associated with row security permission lists. Customers who modified the system to use non-tree based security in previous releases only have to import the customized table capturing the row security permission lists and security definitions into SJT_CLASS. You can continue to assign the permission lists to users in the Row Security field on the User Profile - General page.

New customers, or customers using non-tree based security for the first time, should use role-based permission lists. This will provide you much greater flexibility.

This diagram shows the search page determining which permission lists a user has and what data permission the list gives the user. The user, TRN, is associated with the permission list TRAIN for both row security and permission lists through roles. Since permission list TRAIN is granted access to worker's records in department 123 only, the search results will display only those workers from this department:

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This table lists where you enter and maintain user security data and to which record the user security data is saved:

Data Type	Security Page in which Data is Entered or Maintained	Record Storing User Security Data
Row security permission lists	Security by Dept Tree page	SCRTY_TBL_DEPT This data is loaded into SJT_CLASS_ALL
Role-based permission lists	Security by Permission List page	SJT_CLASS This data is loaded into SJT_CLASS_ALL
Permission lists assigned to roles	Roles - Permission Lists page	PSROLECLASS This data is loaded into SJT_OPR_CLS.
Roles assigned to users	User Profile - Roles page	PSROLEUSER This data is loaded into SJT_OPR_CLS
Row security permission lists assigned to users	User Profile - General page	PSOPRDEFN This data is loaded into SJT_OPR_CLS

Note

The data from PSROLECLASS, PSROLEUSER, and PSOPRDEFN is loaded into SJT_OPR_CLS either automatically by the system, when you enable the USER_PROFILE and ROLE_MAINT messages, or when you run the Refresh SJT_OPR_CLS process.

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See Understanding PeopleSoft Security.

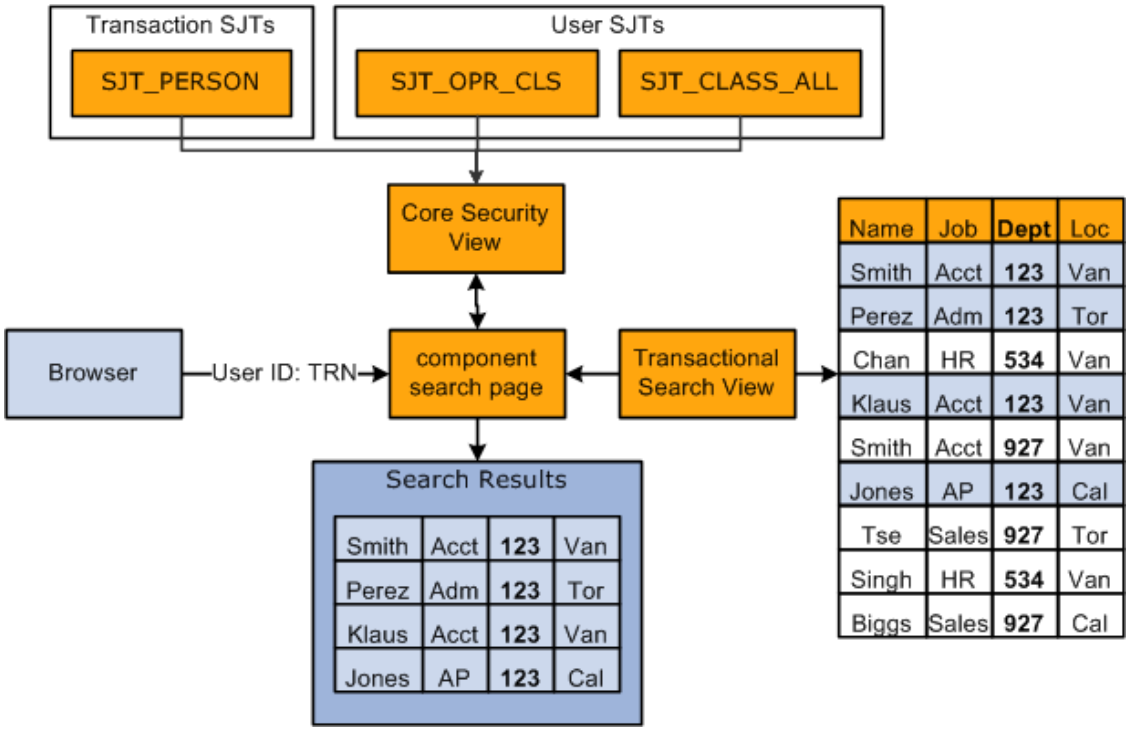
See Setting Up and Assigning Tree-Based Data Permission.

See Assigning Role-Based Data Permission Security to Permission Lists.

Security Join Tables

The system stores security data in transaction and user security join tables (SJTs). When you access a transaction component with a security search view, the security view references the security join tables to determine how the data is secured and what access the user has.

This graphic shows the search page determining which permission lists a user has and what data permission the list gives the user using either the transaction or user security join tables. The transaction security join table is determined by the type of data stored in the component:



Transaction Security Join Tables

Each transaction security join table stores the transaction data required to secure each row of data. The security join tables store one row of data for each unique combination of key fields.

There are four transaction security join tables:

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Transaction Security Join Table	Description	Stores Data From:	Key Fields
SJT_PERSON SJT_PERSON_USF **Note:** SJT_PERSON is used by customers using the core job data components and SJT_PERSON_USF is used by customers using the USF job data components.	Contains transaction data for the people (employees, contingent workers, POIs with jobs, and POIs without jobs) in your HCM system.	• JOB • JOB_JR • PER_ORG_ASGN • PER_POI_SCRTY	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 EMPLID
SJT_DEPT	Contains the transaction data for the HCM departments.	DEPT_TBL	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 SETID DEPTID
HRS_SJT_JO	Contains the transaction data for the job openings in your system.	• HRS_JOB_OPENING • HRS_JO_RTEAM_VW	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 HRS_JOB_OPENING_ID

The key fields are:

- SCRTY_TYPE_CD (security access type code)

  Security access types indicate which field is used for transaction security data. For example the security type 002 enables you to secure person data by location.

  Security access types are unique to a security access set.

- SCRTY_KEY1, SCRTY_KEY2, and SCRTY_KEY3 (security keys)

  The key security fields uniquely identify the security transaction data securing a row of data. The system determines the key fields by the security access type. For example, if person data is secured by location, then the key security fields are BUSINESS_UNIT (the prompt value for location) and LOCATION (the third key field isn't required for this example).

- EMPLID

  A person's unique identifying number that is assigned to them on the Personal Data pages.

- SETID and DEPTID

  A department's set ID and department ID.

- HRS_JOB_OPENING_ID

  A job opening's unique identifying number, which is assigned to it on the Job Opening page.

Each table stores additional fields depending on the type of security you are using.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the security join table SJT_PERSON looks like this:

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SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3	EMPLID
001	Department set ID: SHARE	Department ID: 123	N/A	IN3321
001	Department set ID: SHARE	Department ID: 534	N/A	IN7894
001	Department set ID: USA	Department ID: OKL	N/A	US8390

If you used two security access types, for example Job Location (002) and Job Department Tree, SJT_PERSON looks like this:

SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3	EMPLID
001	Department set ID: SHARE	Department ID: 123	N/A	IN3321
002	Location business unit: FRA01	Location code: PAR	N/A	IN3321
001	Department set ID: SHARE	Department ID: 534	N/A	IN7894
002	Location business unit: AUS01	Location code: SYD	N/A	IN7894
001	Department set ID: USA	Department ID: OKL	N/A	US8390
002	Location business unit: USA	Location code: KSC	N/A	US8390

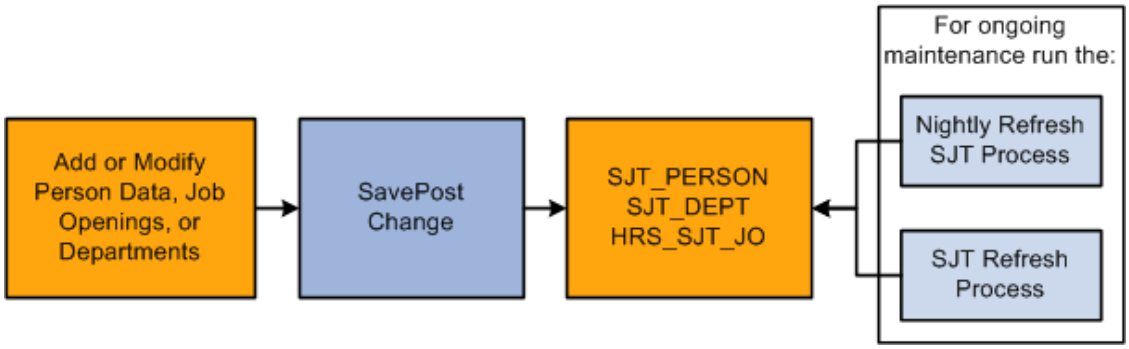
> **Note**
>
> Locations and departments do not need three key fields to uniquely identify them so the third security key field isn't necessary for this example.

When you first enable a security access type, load the transaction data into security join tables using the SJT Refresh process. After the initial load, the system updates the tables using SavePostChange PeopleCode when you make a change to the transaction security data in the transaction components. You can also capture any changes the PeopleCode misses by running the SJT Refresh process as needed or the Nightly Refresh process.

> **Note**
>
> The SavePostChange PeopleCode on the transaction component subpage SCRTY_SJT_SBP updates the security join tables.

This graphic illustrates how the transaction security join tables are kept up to date, as described above:

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See Nightly SJT Refresh Process Page.

See Refresh Trans. SJT tables Page.

User Security Join Tables

The user security join tables store the user security data required to determine users' data permission. The security join tables store one row of data for each unique combination of key fields.

There are two user security join tables:

User Security Join Table	Description	Stores Data From:	Key Fields
SJT_CLASS_ALL	Contains the data permission information for all the permission lists that are given data access on the Security by Dept Tree page or Security by Permission List page.	• SCRTY_TBL_DEPT • SJT_CLASS	CLASSID SCRTY_SET_CD SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3
SJT_OPR_CLS	Contains the user IDs of people with data permission and the permission lists with data permission that are assigned to them.	• PSOPRDEFN • PSROLEUSER • PSROLECLASS	OPRID CLASSID

In addition to the security access type field and security key fields, the user security join tables store the following fields:

- SCRTY_SET_CD (security set code)

  A security set is a set of data secured in HCM. For example, PPLJOB is the security set for the data of people with jobs and DEPT is the security set for the department data. Each security set has security access types.

- OPRID

  The user's user ID.

- CLASSID

  The ID of the role-based or row security permission list.

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> **Note**
>
> The security join tables store row security permission lists (ROWSECCLASS) as CLASSID permission lists but identify them using a row security flag.

The permission list data in SJT_CLASS_ALL comes from two sources:

- SCRTY_TBL_DEPT

  When you add tree-based data permission to a permission list, you use the Security by Dept Tree page and the system saves the permission list information to the SCRTY_TBL_DEPT record.

- SJT_CLASS

  When you add non-tree based data permission to a permission list, you use the Security by Permission List page and the system saves the permission list information to the SJT_CLASS record.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the SCRTY_TBL_DEPT table look like this:

ROWSECCLASS	SET ID	DEPTID
TRAIN	Department set ID: SHARE	Department ID: 123
PAY1	Department set ID: SHARE	Department ID: 534
PAY2	Department set ID: USA	Department ID: OKL

To load the data from the SCRTY_TBL_DEPT table, you need to run the Refresh SJT_CLASS_ALL process. In SJT_CLASS_ALL, the Refresh SJT_CLASS_ALL process:

- Creates a row of data for each enabled, tree-based security access type (and it's security set) with the data permission you set up on the Security by Dept Tree page.

  For example, if you enable security access type 012 (RS Dept Id) and security access type 001 (Job Department Tree) and grant the row security permission list TRAIN data permission to department 123, the process will create a row for each security access type and the permission will have access to people with jobs in department 123 and job openings in department 123.

- Saves the row security permission list as a CLASSID permission list.
- Saves the department set ID as SCRTY_KEY1 and the department ID as SCRTY_KEY2.

If you are securing the data of people with jobs using the security access type Job Location (002), the key fields of the security join table SJT_CLASS look like this:

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	002	Location business unit: FRA01	Location code: PAR	N/A
PAY1	PPLJOB	002	Location business unit: AUS01	Location code: SYD	N/A
PAY2	PPLJOB	002	Location business unit: USA	Location code: KSC	N/A

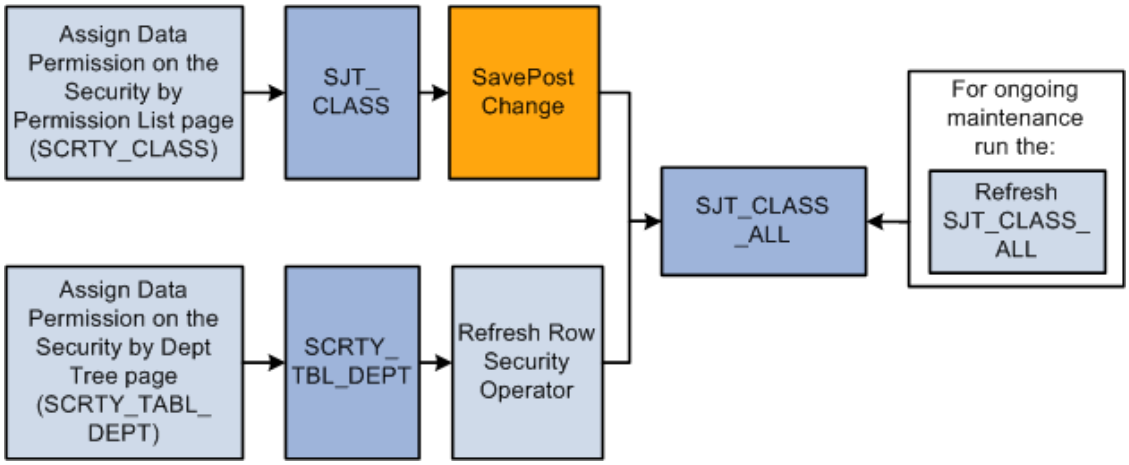
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When you save your changes on the Security by Permission List page, SavePostChange PeopleCode automatically updates the data to the security join table SJT_CLASS_ALL.

If you are using both security access types, SJT_CLASS_ALL looks like this after you have run the Refresh SJT_CLASS_ALL process and the PeopleCode has updated it:

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	001	Department set ID: SHARE	Department ID: 123	N/A
TRAIN	PPLJOB	002	Location business unit: FRA01	Location code: PAR	N/A
PAY1	PPLJOB	001	Department set ID: SHARE	Department ID: 534	N/A
PAY1	PPLJOB	002	Location business unit: AUS01	Location code: SYD	N/A
PAY2	PPLJOB	001	Department set ID: USA	Department ID: OKL	N/A
PAY2	PPLJOB	002	Location business unit: USA	Location code: KSC	N/A

This graphic illustrates how the permission list user security join tables are kept up to date, as previously described:



See Refresh SJT_CLASS_ALL Page.

The security join table SJT_OPR_CLS stores the relationship between User IDs and permission lists with data permission. The data in SJT_OPR_CLS comes from three sources:

- PSOPRDEFN

  This record contains the relationship between the User ID and row security permission list from the User Profile - General page.

- PSROLEUSER

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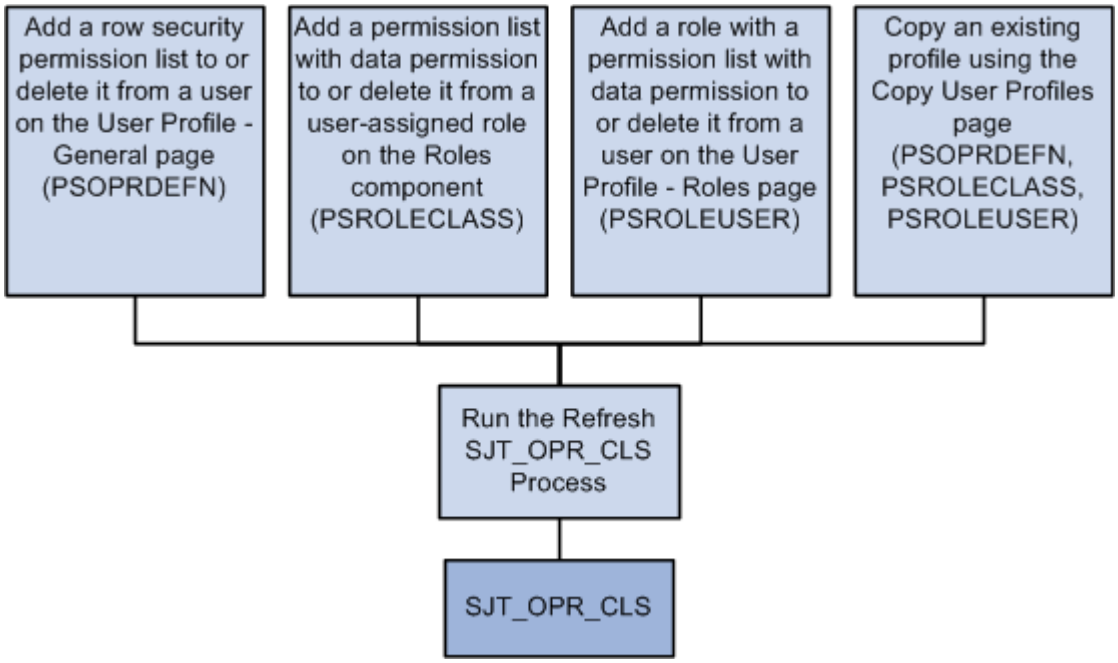
This record contains the relationship between the User IDs and roles from the User Profile - Roles page.

- PSROLECLASS

  This record contains the relationship between roles and permission lists from the Roles - Permission Lists page.

To update SJT_OPR_CLS with the data from PSOPRDEFN, PSROLECLASS, and PSROLEUSER, run the Refresh SJT_OPR_CLS process whenever you add a permission list with data security to a user profile (either by adding a row security permission list on the User Profile - General page, by adding a role-based permission list with data permission to a user-assigned role on the Roles - Permission Lists page, adding a role with data permission on the User Profile - Roles page, or by creating a new user profile by copying an existing one) or delete one from a user profile.

This graphic illustrates this process of when to update the user profile security join table:



> **Note**
>
> You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

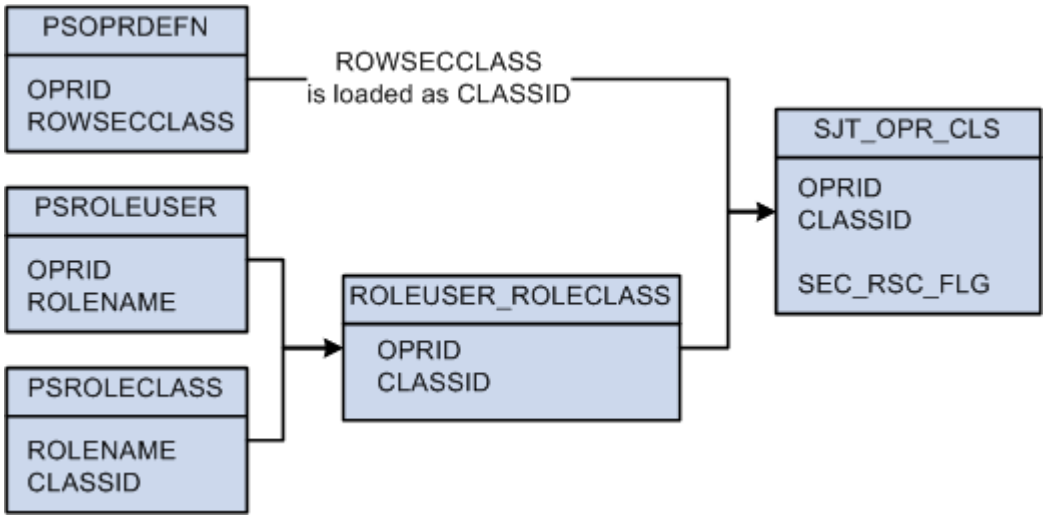
The Refresh SJT_OPR_CLS process loads the OPRID and ROWSECCLASS values from PSOPRDEFN directly into SJT_OPR_CLS, saving the row security permission list as CLASSID.

To establish the relationship between user profiles and role-based permission lists, the process first loads the OPRID and ROLENAME from PSROLEUSER and the ROLENAME and

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CLASSID from PSROLECLASS into a temporary table (ROLEUSER_ROLECLASS) and then loads the OPRID and CLASSID, and the relationship between them, into SJT_OPR_CLS.

This diagram illustrates the data stored in SJT_OPR_CLS and their source as described above:



Note

The SEC_RSC_FLG field indicates if the CLASSID was originally a ROWSECCLASS permission list by flagging it with a value of Y.

See Refresh SJT_OPR_CLS Page.

Security Sets and Security Access Types

A security set is a grouping of data that is being secured. The sets differ by the origin of the transaction security data. For example, people of interest without jobs have a separate security set from people with jobs because the transaction data used to secure them does not come from the JOB record, but from the PER_POI_SCRTY record.

PeopleSoft delivers the following five security sets:

Security Set	Description	Security Join Table Storing Data
PPLJOB	People with Jobs Includes the data of any person who has a JOB record and all the associated data for that person.	SJT_PERSON

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Security Set	Description	Security Join Table Storing Data
PPLUSF	People with Jobs for United States Federal Government Includes the data of any person who has a GVT_JOB record and all the associated data for that person.	SJT_PERSON_USF
PPLPOI	People of interest without jobs Includes the data of any person who does not have a JOB record and all the associated data for that person.	SJT_PERSON
DEPT	Departments Includes department budgets and positions.	SJT_DEPT
RSOPN	Job Openings Includes the data of job openings, including the data of applicants associated with a job opening.	HRS_SJT_JO
GPSPOST	German Public Sector Post Management	GPS_PM_CFG_SJT
TBHTMPL	Template Based Hire	HR_TBH_CFG_SJT

Note

PeopleSoft has delivered all the security sets you are likely to need. If you add new sets, it is considered a customization.

See Security Set Table Page.

Security access types are ways of securing the data within a security set. Each security set has a number of security access types that you can choose to enable. Among other things, security access types determine:

- The security transaction data.
- If there is data security for future-dated rows.
- If the access type uses a department security tree.

Note

You can only set up department hierarchies on security trees and you can only grant security access by department tree to row security permission lists.

Security access types that don't use a department security tree do not have a hierarchical structure and require that you list each field value individually for each permission list.

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The following table lists the security access types by security set:

Security Set	Security Access Types
PPLJOB	• Job Department Tree (001) • Job Location (002) • Job Business Unit (003) • Job Company (004) • Job Reg Region (005) • Job Salary Grade (014) • Person Organization (015) • Job - Deptid - non Tree (025) • Job Company/Paygroup (032) • Group Build (045) • Matrix Team (046)
PPLUSF	• US Federal Department Tree (016) • US Federal Location (017) • US Federal Company (018) • US Federal Business Unit (019) • US Federal Salary Grade (020)
PPLPOI	• POI Business Unit (006) • POI Location (007) • POI Institution (008) • Person of Interest (009)
DEPT	• Departments by Tree (021) • Departments - non Tree (022) • Departments by Set ID (023)
RSOPN	• RS Company (010) • RS Business Unit (011) • RS Dept Id (012) • RS Location (013) • Recruiting Team (031)
GPSPOST	GPS Post Management (037)
TBHTMPL	• Template ID (033) • Template Category (034) • Person Organisation (035) • Country (036) • Template Transaction Type (038)

> **Note**
>
> PeopleSoft has delivered all the security access types you are likely to need. You can add new types but it requires a very good knowledge of the application and of SQL.

Security administrators can only assign data permission using the security access types that you enable.

See Security Type Table Page.

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Enabling and Using Multiple Security Access Types

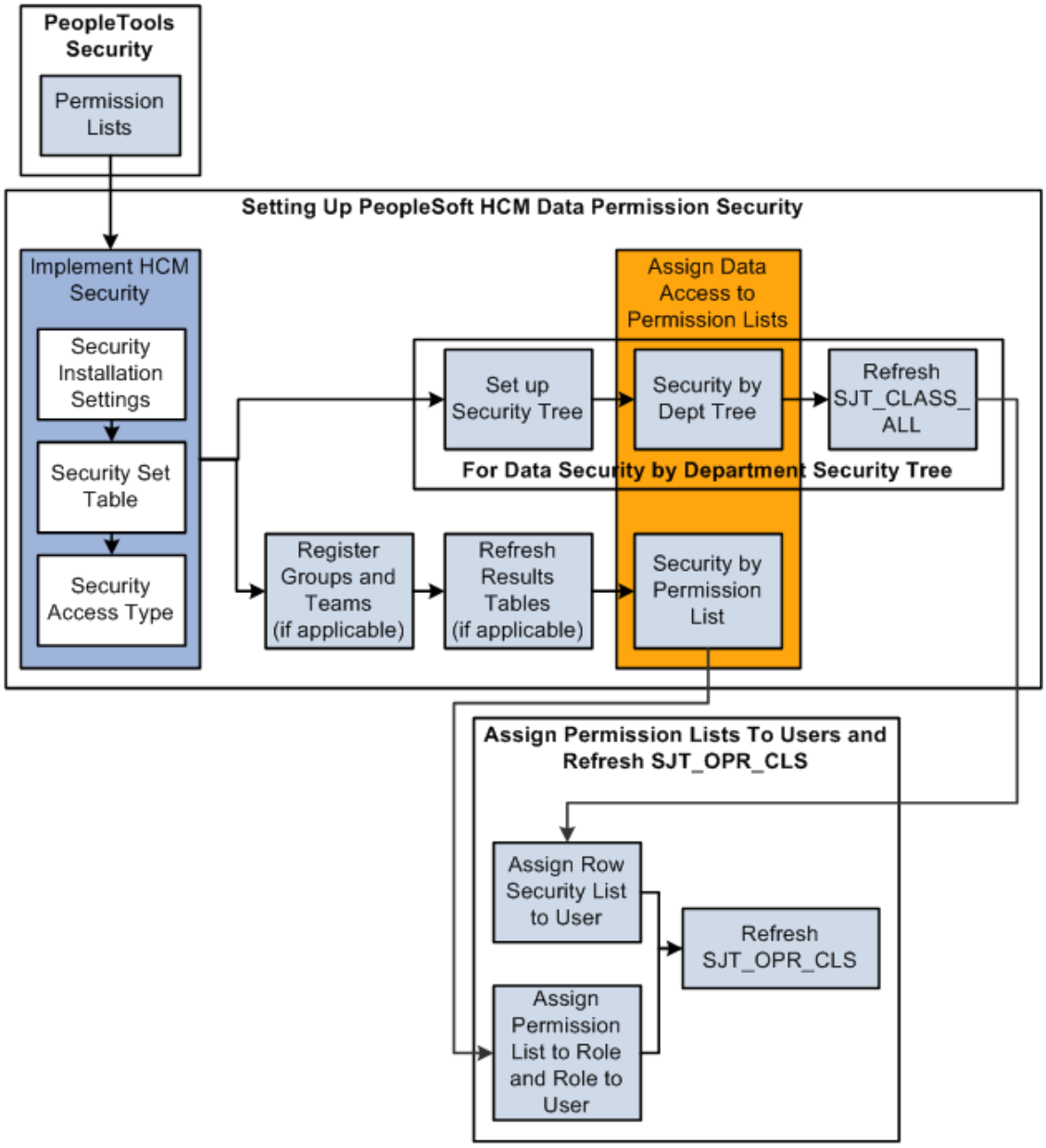
When you grant a permission list access to data in a security set using more than one security access type the security access creates a union, not a join or an intersect, with the two types. For example, if you enable the Job Company and Job Business Unit security access types for the PPLJOB security set and grant a permission list access to people in company A and people in business unit B, users with the permission list can access people in company A or people in business unit B; their access is not restricted to people in both business unit B and company C.

> **Note**
>
> See the security technical brief posted on My Oracle Support for information about creating security access types that join transaction fields to secure data.

HCM Security Process Flow

When you set up HCM data permission security you will follow this process flow, which is detailed below:

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To set up HCM data permission:

1. Set up permission lists in the PeopleTools pages.
2. Set the security installation settings on the Security Installation Settings component.
3. Review security sets on the Security Set Table component.
4. Enable security access types on the Security Access Type component.
5. Assign data permission to permission lists:
   - If you are using security tree-based security access types, set up a security tree, assign data permission on the Security by Dept Tree component, and refresh SJT_CLASS_ALL.
   - If you are using non-tree based security access types, register any group IDs or matrix teams, if any, refresh the Results tables for the group IDs and teams, if applicable, then assign data permission on the Security by Permission List component.

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6. Assign permission lists to users (by way of roles if you are using role-based permission lists or directly to the user profile if you are using row security permission lists).
7. Refresh SJT_OPR_CLS.

Example of HCM Data Permission

Grant the following security to these permission lists:

Permission List	Page	Security Access Type	Security Value
JobByDept	Security by Dept Tree page	Job Department Tree (001)	Department 10100 (You must select set ID SHARE as the first key)
JobByLoc	Security by Permission List page	Job Location (002)	Location UK1 (You must select business unit GBR01 as the first key)
MyJobs	Security by Dept Tree page	Job Department Tree (001)	Department 11000 (set ID SHARE)
Security by Permission List page	Job Location (002)	Location USA (Business unit GBL01)	

Grant the permission lists to the following roles:

Role	Permission List	Outcome
Role 1	JobByDept	Role 1 has no access because tree–based department security (security access type 001) does not work with roles.
Role 2	JobByLoc	Has access to people with jobs in location UK1.
Role 3	MyJobs	Has access to people with jobs in location USA. Does not have security access to department 11000.

Grant the following row security permission lists and roles to users:

User ID	Row Security Permission List	Role	Has Access to People with Jobs In:
User A	JobByDept		Department 10100.
User B	JobByDept	Role 2	Department 10100 Location UK1.
User C		Role 2	Location UK1.
User D		Role 3	Location USA
User E	MyJobs		Department 11000 Location USA.
User F		Role 1	Has no access.

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User ID	Row Security Permission List	Role	Has Access to People with Jobs In:
User G	JobByDept	Role 2 Role 3	Department 10100 Location UK1 Location USA.

Implementing Data Permission Security

To implement data permission security, use the Security Installation Settings component (SCRTY_INSTALL), the Security Sets component (SCRTY_SET_TBL), the Security Access Type component (SCRTY_TYPE2_TBL), the Group Registration component (SCRTY_GB_REGISTER), and the Matrix Team Registration component (SCRTY_MX_REGISTER).

These topics discuss several ways to implement data permission security.

Pages Used to Implement Data Permission Security

Page Name	Definition Name	Usage
Security Installation Settings Page	SCRTY_INSTALL	Choose the HCM security settings for your installation.
Security Set Table Page	SCRTY_SET_TBL	Review existing security sets and the security access types you've attached to them.
Security Update Groups Page	SCRTY_SJT_UPD	Define the data groups that can be updated by the SJT Refresh process.
Security Type Table Page	SCRTY_TYPE2_TBL	Enable or modify existing security access types or create new ones.
Security Type SQL Page	SCRTY_TYPE2_SQL	Enter the SQL statements for the new security types.
Group Registration Page	SCRTY_GB_REGISTER	Register groups from the Group Build feature that you want to use for row level security.
Matrix Team Registration Page	SCRTY_MX_REGISTER	Register a matrix team that you want to use for row level security.
Refresh Groups Page	SCRTY_GB_REFRESH	Refresh security-related groups that were created using the Group Build feature.
Refresh Matrix Teams Page	SCRTY_MX_REFRESH	Refresh security-related matrix teams.

Understanding Future-Dated Security

The Security Installation Settings page enables you to select actions that, when used on the Work Location page (JOB_DATA1), trigger the SavePostChange PeopleCode to create a future-dated row in SJT_PERSON.

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The system normally secures data using the current transaction security data. Only users with data permission access to the transaction security data on the current row can access the person's data

When you include future-dated transaction security data rows the system uses both the current data and the future-dated values to secure the data. This gives users with data permission access to the transaction security data on the current row and users with data permission access to the transaction security data on the future-dated row access to the person.

The system only creates future-dated security rows in SJT_PERSON when you:

1. Select one or more actions on the Security Installation Settings page.
2. Enable future-dated rows for the security access type.

> **Note**
>
> This enables you to use future-dated security with some types but not others.

3. Create and save a future-dated row in a component that uses the JOB record using one of the actions you selected on the Security Installation Settings page.

If you have selected the action of *Transfer* in the Actions that trigger Future Dated Security Rows grid, then when you create a future-dated Job Data row with the action of *Transfer* for a person, the system will add a row to the SJT_PERSON with the transaction data from the new row. Users with data permission to the future-dated transaction security data will have access to the person's data.

> **Note**
>
> Only component security views use future-dated security rows.

For example, as of January 1, 2005 Kenny Wong works in department 42000. Starting July 1, 2006 he will transfer to department 44000. On April 15, 2006, in anticipation of the transfer, the HR administrator enters a future-dated job data row for the transfer.

Julie Sparrow manages department 42000 and Barry Deere manages department 44000 and each has data permission to the people in their departments.

As of April 15, 2006 Kenny Wong has the following two job data rows:

Effective Date	Action	Department
January 1, 2005	Hire	42000
July 1, 2006	Transfer	44000

The data permission depends on if you are using future-dated security for that security access type and if you have selected the action of *Transfer* on the Security Installation Settings page:

- If you have *not* selected it:
  - The SavePostChange PeopleCode does not update SJT_PERSON with the new department information from the future-dated row because it is not yet effective.

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> **Note**
>
> When the transfer row does become effective, the Nightly SJT Update process updates SJT_PERSON, overwriting the old row with the new row.

  - Julie can access Kenny's data until June 30, 2006 and Barry can access it starting July 1, 2006.

- If you *have* selected it:
  - The SavePostChange PeopleCode creates a new row in SJT_PERSON with the future-dated transaction security data. The system identifies this row as future-dated.

> **Note**
>
> When the transfer row becomes effective, the Nightly SJT Update process updates SJT_PERSON, removing the old row and making the future-dated row current.

> **Note**
>
> Search views that don't use future-dated security will not use the future security row when enforcing data permission.

  - Julie can access Kenny's data until June 30, 2006 and Barry can access it starting April 15, 2006.

Understanding Special Job Security Options

Without special job security options, the system creates a single transaction security data row for each unique combination of ID and employment record number. When you use special job security options, the system creates additional rows in SJT_PERSON with different security key values to enable access to rows to which a permission list would normally not have access.

For example, if you are securing data by department and have enabled people with access to the home job data record to view the host job data record but are *not* allowing people with access to the host job data record to view the home job data record, the system will create the following three rows of data in SJT_PERSON (only the relevant columns are shown) for a person whose home job data record (employee record number 0) is in department 25000 and whose host job data record (record number 1) is in department 20000:

Key 1	Key 2	Empl ID	Empl Record	Home/Host	Intl. Type
SHARE	25000	K0G019	0	Home	
SHARE	25000	K0G019	1	Host	Home-Host
SHARE	20000	K0G019	1	Host	

The system creates the row marked Home-Host to grant the special job security option. By creating a row for the host record with the department value of the home record, people with data permission to the home record can access the host record.

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The system works the same way for the other special security options, creating an additional row and inserting the key values that enable the access.

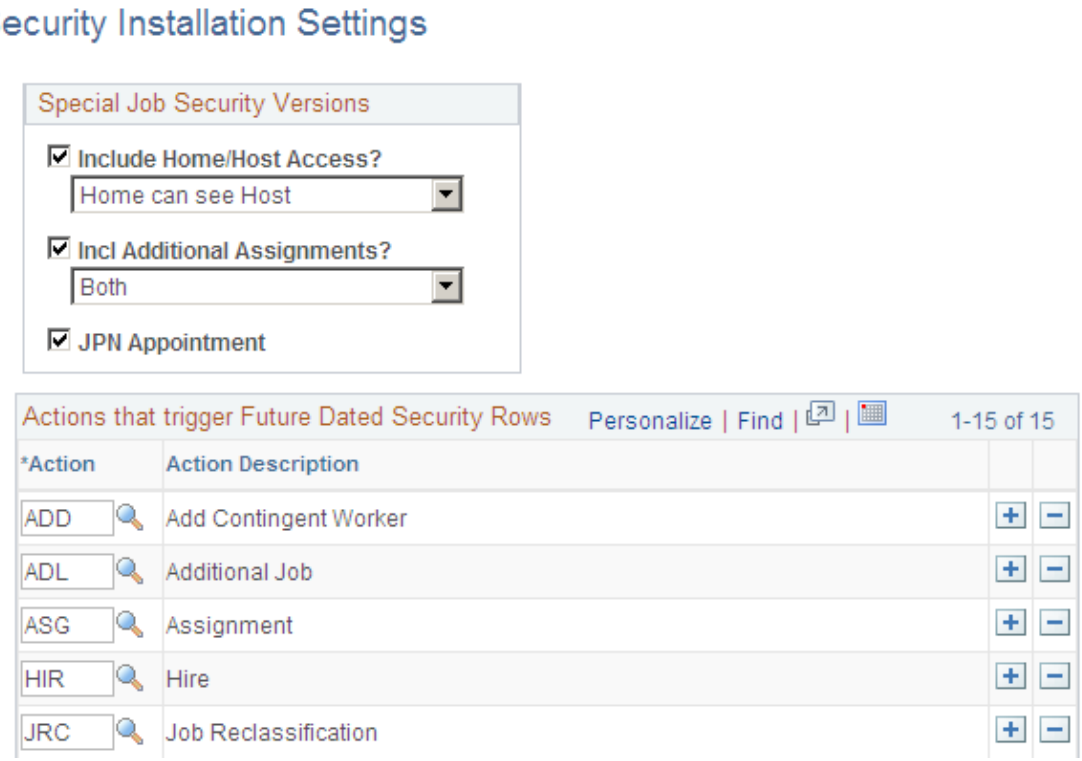
Security Installation Settings Page

Use the Security Installation Settings page (SCRTY_INSTALL) to choose the HCM security settings for your installation.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Installation Settings**, and then **Security Installation Settings**

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



Special Job Security Versions

The options you select here will be available for your installation but will not be enabled unless you select them again for the security access types you are using. This enables you to use the security versions for some security access types and not others.

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Field or Control	Description
Include Home/Host Access?	This option is for tracking global assignments. When an employee is on assignment they have a host record and a home record. Select one of the following options: • *Home can see Host*: Select to enable a person with data permission that enables them to view the home record to also view the employee's host record. A person with just data permission to the host record will not be able to see the employee's home record. • *Host can see Home*: Select to enable a person with data permission that enables them to view the host record to also view the employee's home record. A person with just data permission to the home record will not be able to view the host record. • *Both*: Select to enable a person with data permission to the home record to view the host record and a person with data permission to the host record to view the home record. If you do not select Include Home/Host Access? then regular data permission rules apply. See PeopleSoft Human Resources Track Global Assignments: Understanding Global Assignment Tracking.

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Field or Control	Description
Incl. Additional Assignments?	This option is for workers with additional assignments added using the Job Data Concurrent component (JOB_DATA_CONCUR). When a worker has an additional assignment, they have a controlling employee or contingent worker instance with an active job data record and an additional assignment job data record. Select one of the following options: • *Assignment can see Instance*: Select to enable a person with data permission that enables them to view the assignment job data record to also view the person's controlling instance job record. A person with data permission to the controlling instance job data record will not be able to see the worker's assignment job data record. • *Instance can see Assignment*: Select to enable a person with data permission that enables them to view the controlling instance job record to also view the person's assignment job data record . A person with data permission to the assignment job data record will not be able to see the worker's controlling instance job data record. • *Both*: Select to enable a person with data permission that enables them to view the controlling instance job record to also view the assignment job data record and a person with data permission that enables them to view the assignment job data record to also view the controlling instance job record. • *None*: Select to make additional assignments job data records available to all users. If you do not select Incl. Additional Assignments? then regular data permission rules apply. See PeopleSoft Human Resources Administer Workforce: Adding Additional Assignments.
JPN Appointment	(JPN) Select so that users who have access to the additional appointment of a worker can access the main appointment record for that worker. The system assigns some additional assignments (Kenmu) to a particular EmplID and record called a *main appointment,* the job you can access through the Job Data pages. If you do not select **JPN Appointment?** then regular data permission rules apply. See PeopleSoft Human Resources Administer Workforce: Setting Up Security for Tracking Additional Appointments.

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Actions that trigger Future-Dated Security Rows

Select the actions that will trigger the SavePostChange PeopleCode in the components using the JOB record to create a future-dated security row in SJT_PERSON when they are used in a future-dated row in the Job Data pages. The system will not create security rows for future-dated rows with actions other than those listed here.

To create future-dated rows, you need to select the **Include Future Dates** check box on the Security Type Table. This enables you to use future-dated security for some security access types and not others.

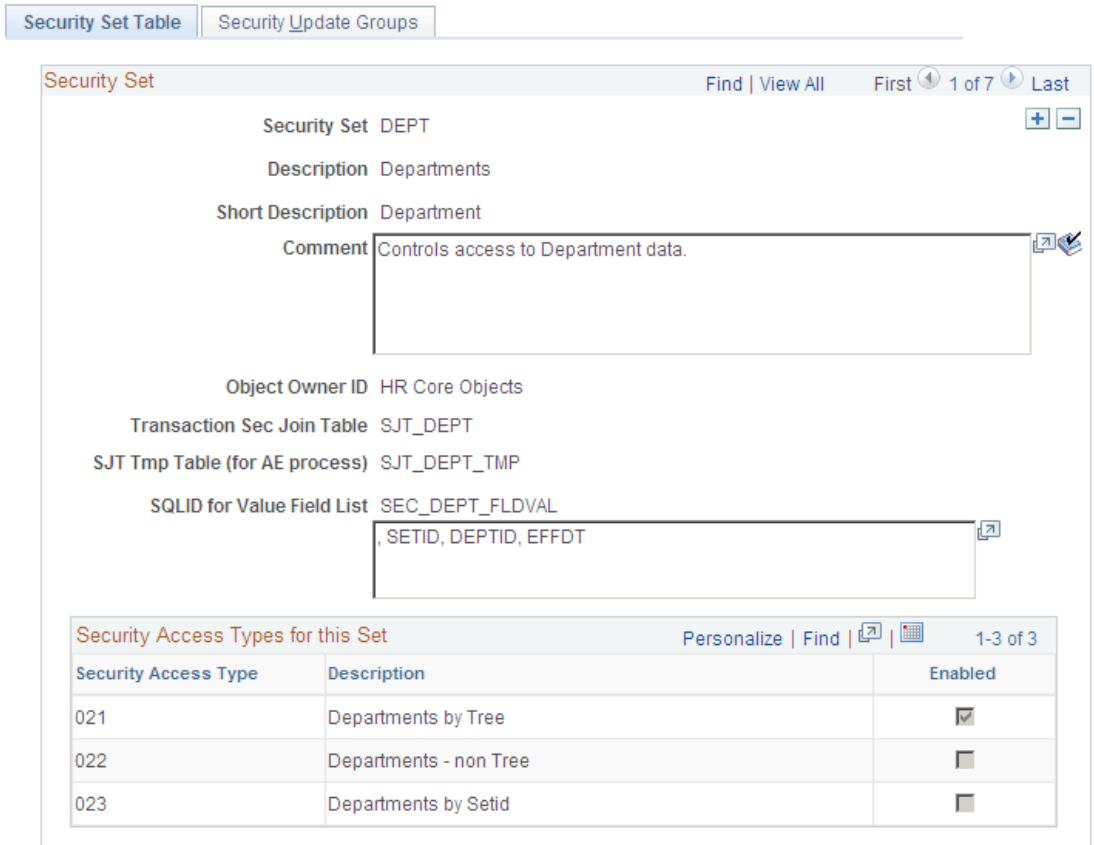
Security Set Table Page

Use the Security Set Table page (SCRTY_SET_TBL) to review existing security sets and the security access types you've attached to them.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Sets**, and then **Security Set Table**

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



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Field or Control	Description
Object Owner ID	Security sets with a PeopleSoft Object Owner ID are system data and not available for modification on this page. You can still modify the Security Update Groups of delivered security sets.
Transaction Sec Join Table	The security join table that stores the transaction data for this security set. **Note:** If you are creating a new security set, you must have created this table in Application Designer before creating the security set. Creating a new security set requires modification of the system. Please refer to the Security technical brief on My Oracle Support for directions.
SJT Temp Table (for AE process)	The temporary record used for PeopleSoft Application Engine. It is a copy of the transaction security join table and also contains the Application Engine process fields. This table updates the transaction security join field using the Application Engine process.
SQLID for Value Field List	The list of fields (not including the key fields) that are in the transaction security join table.
Generate SQL	Click to generate the SQL and SQLID for the value field list.

Security Access Types for this Set

The system lists the security access types for this security set and indicates which ones are enabled. Enable or disable security access types on the Security Type Table page.

See Security Type Table Page.

Security Update Groups Page

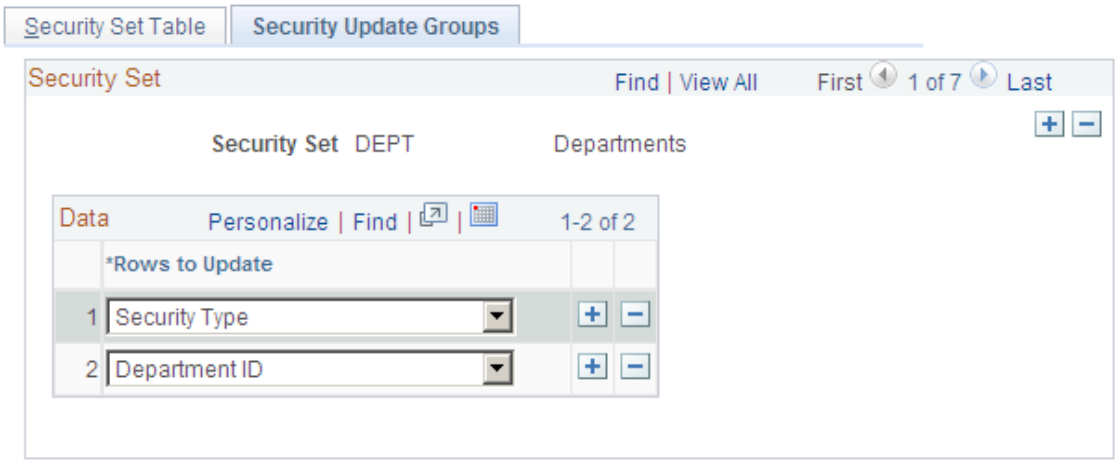
Use the Security Update Groups page (SCRTY_SJT_UPD) to define the data groups that can be updated by the SJT Refresh process.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Sets**, and then **Security Update Groups**

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

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Select which refresh options to make available when updating the security set using the SJT Refresh process. The system makes the options you select here available for this security set on the Refresh SJT page, enabling you to select portions of the security join table to update.

For example, you could refresh all the rows for external instructors by selecting the refresh option Person of Interest Type and the POI Type *External Instructors.*

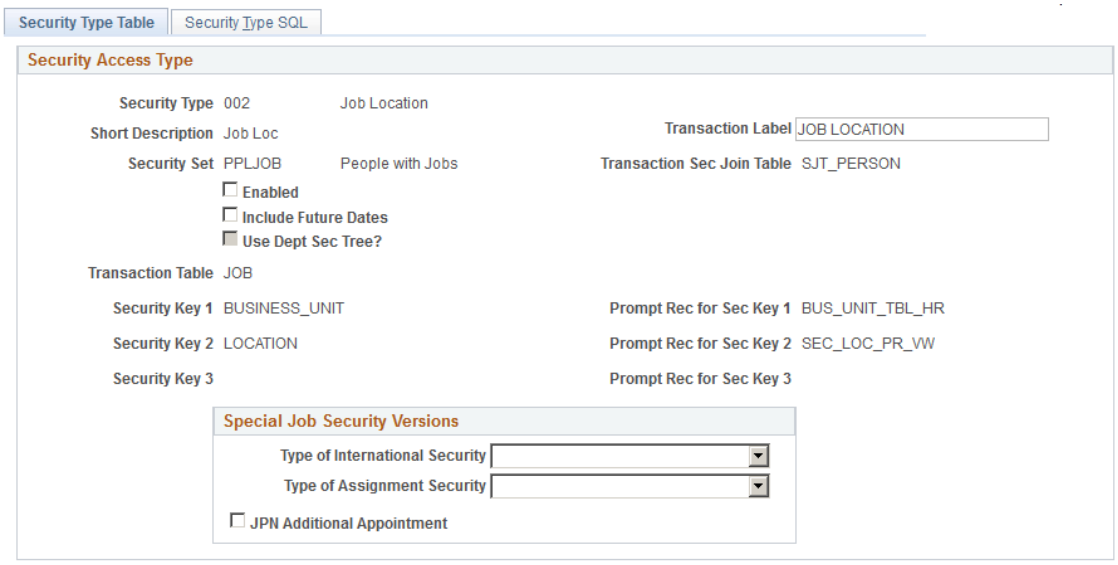
Security Type Table Page

Use the Security Type Table page (SCRTY_TYPE2_TBL) to enable or modify existing security access types or create new ones.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Access Type**, and then **Security Type Table**

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



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You can enable more than one security access types for a security set and you can assign data permission access to a permission list using more than one access type.

> **Note**
>
> PeopleSoft has delivered the most asked for security access types and you should not need to create new types. Enable or disable the types your installation requires.
>
> Please refer to the Security technical brief on My Oracle Support for directions on how to create new security types.

> **Note**
>
> The more security access types you enable and options you use, the more rows of data the system stores in the security join tables. This affects system performance. PeopleSoft advises you to enable only the security types and options required to manage your data permission needs.

Field or Control	Description
Security Type	The system automatically numbers new security types.
Transaction Label	Enter a field label. The system will display this label on a transaction page when the security access type is used as a field to gather data. For example, if you are using fields in addition to POI type to control access to the data of POIs without jobs, the system will use the label you enter here on the Add a POI Type page and Edit POI Relationship page to prompt for security transaction values.
Security Set and **Transaction Sec Join Table**	The security set whose data you are securing and the security join table associated with the security set. See Security Set Table Page.
Enabled	Select to enable the security type.
Include Future Dates	Select to enable the security join tables to store future-dated security rows for this type. The system will only update the security join tables with the future-dated rows that have the actions you selected on the Security Installation Settings page.
Use Dept Sec Tree? (use department security tree?)	Select if this security type uses the department security tree. You can only create department security trees for departments and can only grant data permission based on department security trees to row security permission lists.
Transaction Table	The transaction table that stores the field or fields that will control security for this type.

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Field or Control	Description
Special Job Security Versions	If you enable special job security versions on the Security Installation Settings page, enable the options for this security access type. See Security Installation Settings Page.
Security Key 1, Prompt Rec for Sec Key 1 (prompt record for security key 1), **Security Key 2, Prompt Rec for Sec Key 2** (prompt record for security key 2), **Security Key 3.** and **Prompt Rec for Sec Key 3** (prompt record for security key 3)	Define the security data fields for this type. The fields need to be on the **Transaction Table** record. The prompt record is the record the prompt field values come from when you are assigning values to a permission list. You must select all the records and fields necessary to make a unique qualification here. For example, to select a location (key 2), you first need to select a business unit (key 1). The prompt record for the BUSINESS_UNIT field is BUS_UNIT_TBL_HR and the prompt record for the LOCATION field is LOCATION_TBL.

Refreshing the Transaction Security Join Tables

You should refresh the transaction security join tables whenever you:

- Enable or disable a security access type.
- Enable or disable a future-dated security for an enabled security access type.
- Change the special job security versions for an enabled security access type.

See Refresh Trans. SJT tables Page.

Security Type SQL Page

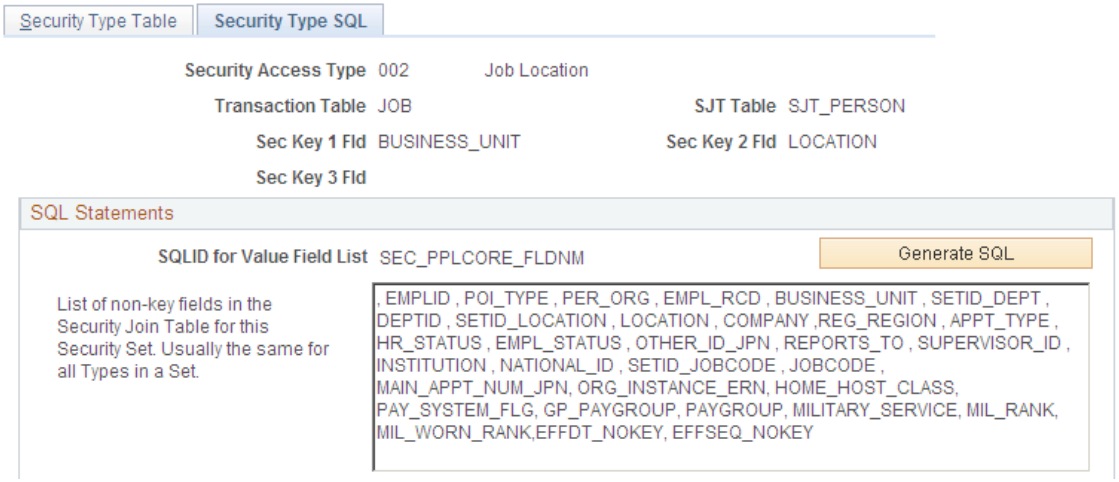
Use the Security Type SQL page (SCRTY_TYPE2_SQL) to enter the SQL statements for the new security types.

Navigation:

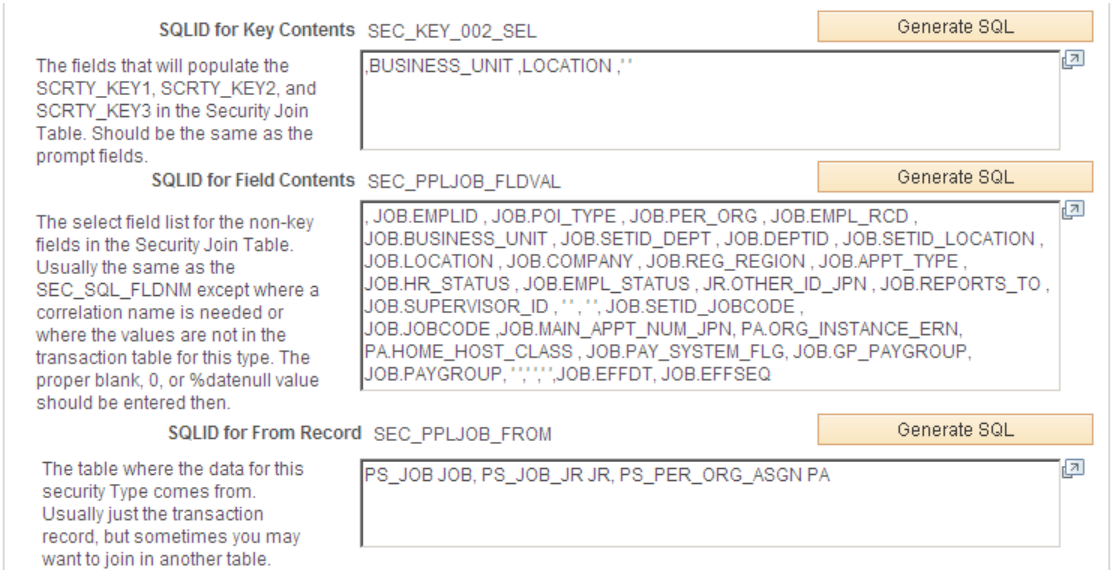
Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Access Type**, and then **Security Type SQL**

This example illustrates the fields and controls on the Security Type SQL page (1 of 3). You can find definitions for the fields and controls later on this page.

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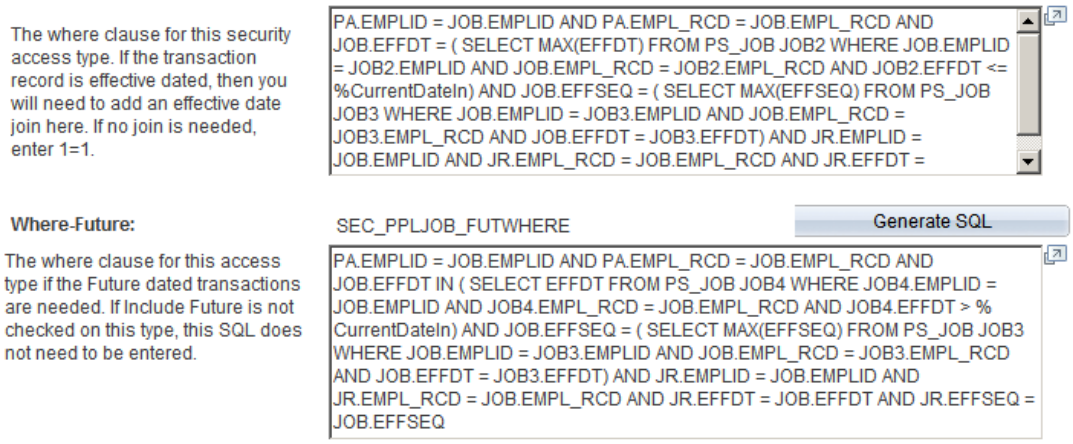


This example illustrates the fields and controls on the Security Type SQL page (2 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Security Type SQL page (3 of 3). You can find definitions for the fields and controls later on this page.

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The Application Engine uses the SQL fragments on this page to build the update and insert statements to update the transaction security join table.

You can use any SQLID but when you click the Generate SQL buttons, the system generates unique IDs based on the security set and/or type.

> **Warning**
>
> This page should only be used by users with a strong understanding of SQL joins and the table relationships.

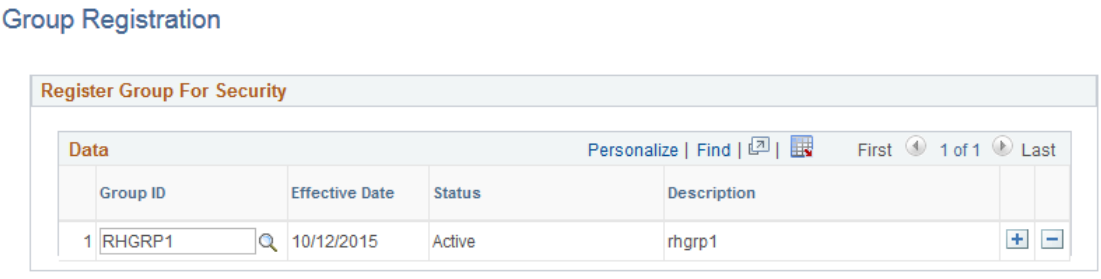
Group Registration Page

Use the Group Registration page (SCRTY_GB_REGISTER) to register groups from the Group Build feature that you want to use for row level security.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Group Registration**, and then **Group Registration**

This example illustrates the fields and controls on the Group Registration page.



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Field or Control	Description
Group ID	Select those groups that were created using the Group Build framework that you want to register as part of row level security. For more information on the Group Build feature, see Understanding Group Build.

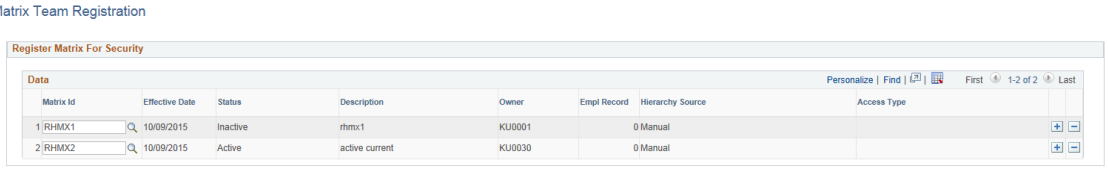
Matrix Team Registration Page

Use the Matrix Team Registration page (SCRTY_MX_REGISTER) to register a matrix team that you want to use for row level security.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Matrix Team Row Level Security**, and then **Matrix Team Registration**

This example illustrates the fields and controls on the Matrix Team Registration page.



Field or Control	Description
Matrix Id	Select those matrix teams that were created using the PeopleSoft Human Resources Administer Workforce: Matrix Team Page that you want to register as part of row level security.

Refresh Groups Page

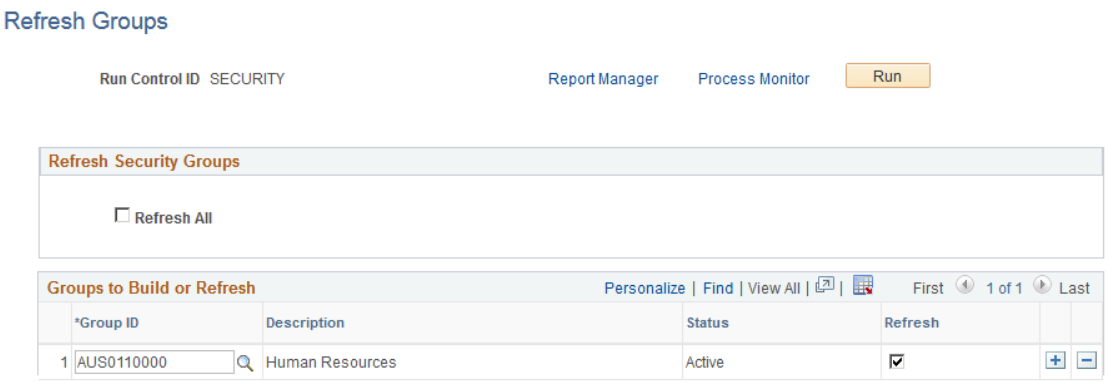
Use the Refresh Groups page (SCRTY_GB_REFRESH) to refresh security-related groups that were created using the Group Build feature.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh Groups**, and then **Refresh Groups**

This example illustrates the fields and controls on the Refresh Groups page.

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After a group is registered, use the Refresh Groups run control page, which allows either refreshing or creating of content for all registered groups (Refresh All) or for individually selected groups, to run the Refresh Groups (SCRTY_GB_REF) process. This process runs the Group Build framework and populates the Security Group Results (SCRTY_GBRES_TBL) transaction table that is used in security access. The process will also remove any inactive groups that are identified on this page. Groups that are future dated will not be picked up by this process.

> **Note**
>
> You need to run the process from the Refresh Transaction SJT tables component to pick up the information stored in the Group Results (SCRTY_GBRES_TBL) transaction table.

Field or Control	Description
Refresh All	Select this option to refresh or generate new content for all active registered security related groups. Any inactive registered groups will be removed from the security results table. To register a group for security purposes, see the Group Registration Page.
Group ID	Select from those groups that were registered on the Group Registration Page.
Status	Indicates if this group is active or inactive. The Security Group Build Refresh process generates new content and updates the Security Results table for active groups and removes content for inactive groups listed on this page.
Refresh	Select to refresh (add, update, or remove) specific rows of group data. The process will use the selected data to update the Group Results (SCRTY_GBRES_TBL) transaction table accordingly. The system will process only those rows that are selected, unless the Refresh All option is selected and then all rows will be processed.

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> **Note**
>
> When the Access Type *Group Build (045)* is enabled, the security sync AE program will pick up and generate entries in SJT_PERSON for all employees found in the associated group table. To enable an Access Type, see Security Type Table Page.

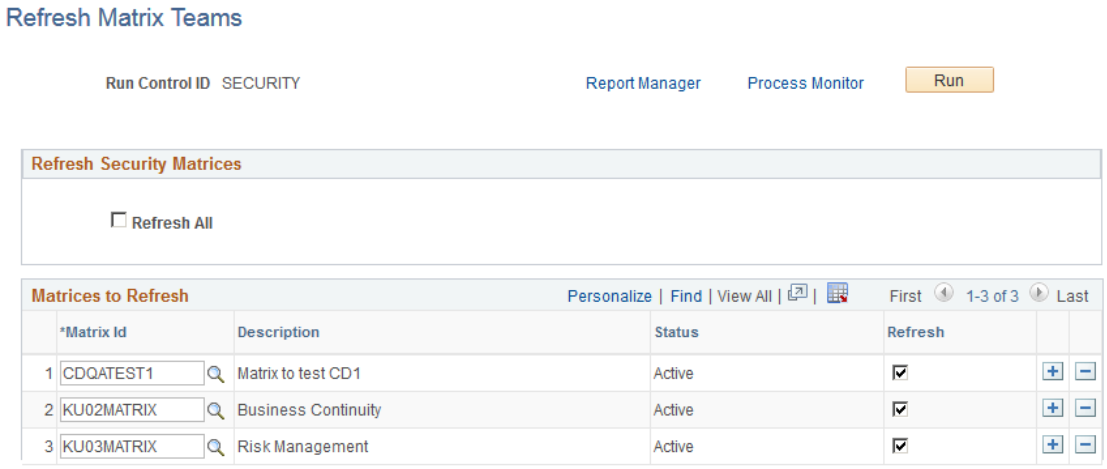
Refresh Matrix Teams Page

Use the Refresh Security Matrix Teams page (SCRTY_MX_REFRESH) to refresh security-related matrix teams.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh Matrix Teams**, and then **Refresh Matrix Teams**

This example illustrates the fields and controls on the Refresh Matrix Teams page.



After a matrix team is registered, use the Refresh Matrix Teams run control page, which allows either refreshing or creating of content for all registered matrix teams (Refresh All) or for individually selected matrix teams, to run the Refresh Matrix Teams (SCRTY_MX_REF) process. This process populates the security Matrix Team Results (SCRTY_MXRES_TBL) transaction table that is used in security access. The process will also remove any inactive matrix teams that are identified on this page. Matrix Teams that are future dated will not be picked up by this process.

> **Note**
>
> You need to run the process from the Refresh Transaction SJT tables component to pick up the information stored in the Matrix Team Results (SCRTY_MXRES_TBL) transaction table.

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Field or Control	Description
Refresh All	Select this option to refresh or generate new content for all active registered security related matrix teams. Any inactive registered matrix teams will be removed from the security results table. To register a team for security purposes, see the Matrix Team Registration Page.
Matrix Id	Select from those matrix teams that were registered on the Matrix Team Registration Page.
Status	Indicates if this matrix team is active or inactive. The Security Matrix Team Refresh process generates new content and updates the security Matrix Team Results table for active matrix teams and removes content for inactive matrix teams listed on this page.
Refresh	Select to refresh (add, update, or remove) specific rows of matrix team data. The process will use the selected data to update the Matrix Team Results (SCRTY_MXRES_TBL) transaction table accordingly. The system will process only those rows that are selected, unless the Refresh All option is selected and then all rows will be processed.

> **Note**
>
> When the Access Type *Matrix Team (046)* is enabled, the security sync AE program will pick up and generate entries in SJT_PERSON for all employees found in the associated matrix team table. To enable an Access Type, see Security Type Table Page.

Implementing Sensitive Data Masking

The PeopleSoft HCM provides row-level security for Administrator components and ensures that only authorized users have access to different segments of employees. However, this does not control or secure the access to fields on the page that show sensitive information. For protecting such sensitive data, new configurations are provided to mask the sensitive content in respective pages.

The Data Masking addresses the protection of sensitive data by providing a configurable option of masking sensitive content in administrator pages.

The Sensitive data masking is limited to fields storing the following information:

- Bank Account Number
- Date of Birth
- National ID
- Driver’s License Number
- Passport Number

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Video: Image Highlights, PeopleSoft HCM Update Image 28: Data Privacy Enhancements - Sensitive Data Masking

Pages Used to Implement Data Masking

Page Name	Definition Name	Usage
HCM Options Page	INSTALLATION_TBL1B	Enable the settings for data masking.
National ID Type Page	NID_TYPE_TABLE	Configure national ID mask format for each national ID type.
Authorized Roles Page	HCSCM_AUTHROLE	Define the authorized roles who have access to the sensitive information
Setup Component level Masking Page	HCSCM_COMP_CONFIG	View components for which the data masking is configured, and enable or disable data masking at component and field group level
Component Configuration Page	HCSCM_COMP_CFG_DTL	View masking parameters, configure mask format and associated fields.

Note

The Role Data Masking Admin provides access to Authorized Roles and Setup Component Level Masking components.

Authorized Roles Page

Use the Authorized Roles page (HCSCM_AUTHROLE) to define the authorized roles who can view the sensitive content.

The Field Groups refer to a group of fields that store information like National ID. The three pre-defined field groups available as system data are- National ID, Date of Birth and Bank Account Number.

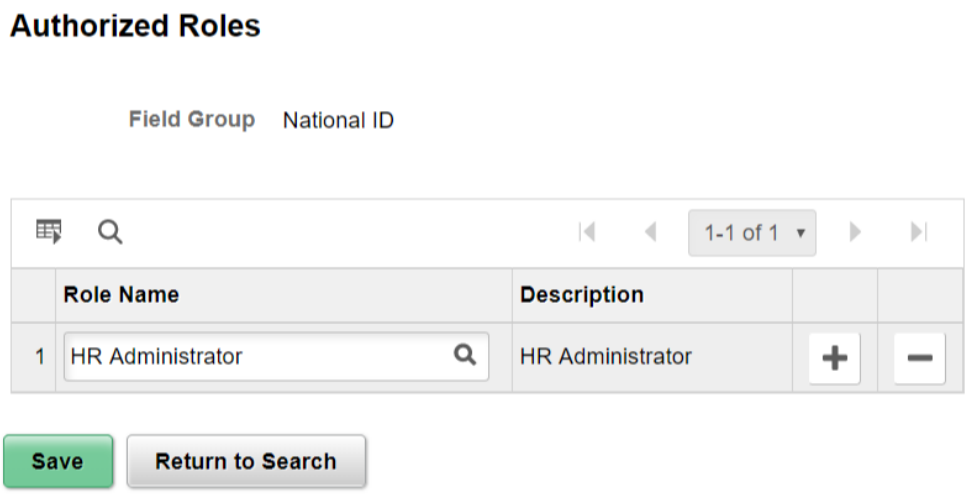
The Authorized Roles are setup for each field group. The users assigned with authorized roles can see the sensitive content belonging to that field group. For all other users, this information appears masked.

Navigation:

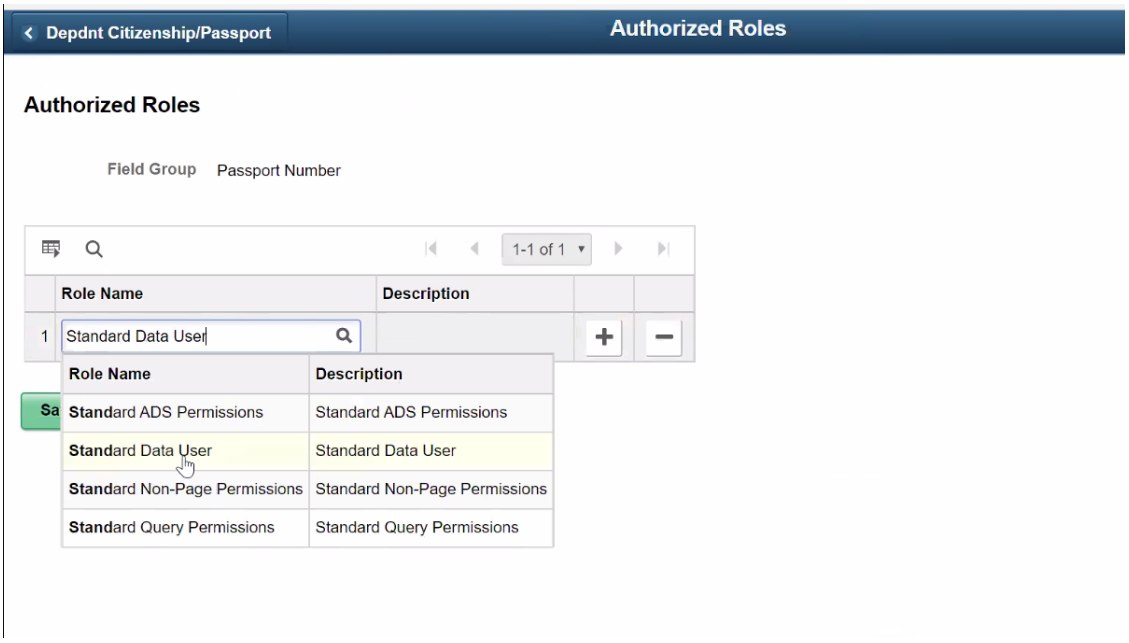
Set Up HCM, and then **Security**, and then **Data Masking** , and then **Authorized Roles**

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

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This example illustrates the fields and controls of Authorized Roles for Passport Number.



Field or Control	Description
Role Name	Assign Roles that are authorized to access sensitive content belonging to the selected Field Group.

There are five defined field groups, they are:

- National ID
- Date of Birth
- Bank Account Number

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- Driver's License Number
- Passport Number

> **Note**
>
> The authorized roles are setup for each field group. Data in sensitive fields for a field group appear as masked for users who do not have access to any of the authorized roles in that field group.

Setup Component level Masking Page

Use the Setup Component Level Masking (HCSCM_COMP_CONFIG) page to enable or disable data masking at a component and field group level. This page lists all the components for which data masking is pre-configured.

Navigation:

Set Up HCM, and then **Security**, and then **Data Masking**, and then **Setup Component Level Masking**

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

Setup Component Level Masking

1-65 of 65

	Component Name	Field Group	Enable Masking	Masking Parameters
1	ABSENCE_HISTORY	Date of Birth	☑	Masking Parameters
2	CAREER_DEPEND_SUMM	Date of Birth	☑	Masking Parameters
3	DEPEND_BENEF	Date of Birth	☑	Masking Parameters
4	DEPEND_BENEF	National ID	☑	Masking Parameters
5	DIRECT_DEPOSIT	Account Number	☑	Masking Parameters
6	EMPLOYEE_SUMMARY	Date of Birth	☑	Masking Parameters
7	EMPLOYEE_SUMMARY	National ID	☑	Masking Parameters
8	EMPLOYEE_SUMM_BEN	Date of Birth	☑	Masking Parameters
9	EMPLOYEE_SUMM_BEN	National ID	☑	Masking Parameters
10	EMPL_MATR_BOOK_ITA	Date of Birth	☑	Masking Parameters

Save

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Field or Control	Description
Component Name	Transaction component that displays sensitive content.
Field Group	Field Group to which the sensitive field in the component belongs.
Enable Masking	Check to enable or disable data masking at a component level
Masking Parameters	Select the link to open component configuration page in a modal window to set the masking parameters for each combination of Component and Field Group.

> **Note**
>
> By default, masking is enabled for all components listed in the Component Level Masking page, provided the Enable Masking check box on the Installation page is selected.

Component Configuration Page

Use the Component Configuration (HCSCM_COMP_CFG_DTL) page to configure the data masking parameters for various components.

For each component, the masking parameters are the records and fields storing sensitive content and any associated information. Associated Fields store information related to sensitive fields. For users without Authorized roles, system masks the sensitive fields and hides the associated fields.

Navigation:

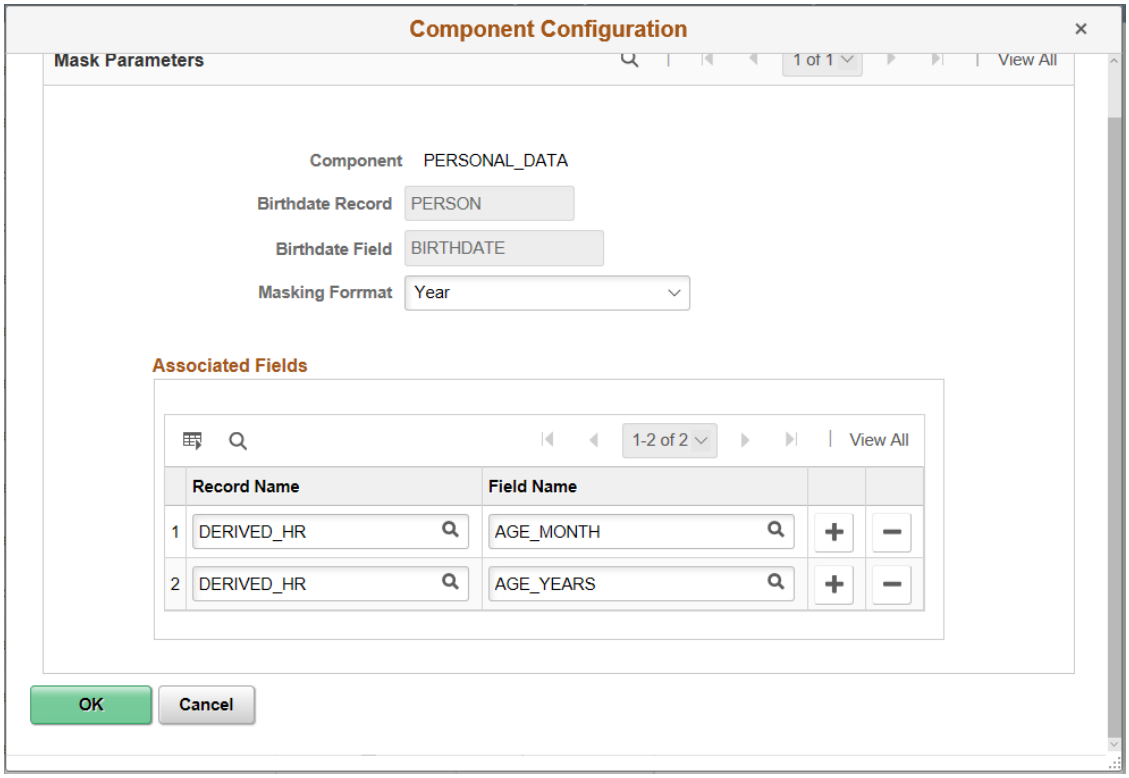
Set Up HCM, and then **Security**, and then **Data Masking**, and then **Component Level Masking**

Select the link of *Masking Parameters*.

This example illustrates the fields and controls on the Component Configuration modal for the field group **Date of Birth** for the component **PERSONAL_DATA**.

> **Note**
>
> The Record and Field storing sensitive information is pre-configured as system data, and is read only. Masking format can be modified for Field Groups- Date of Birth and National ID. Associated Fields are pre-configured for a few of the delivered components. This can be modified.

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Mask Parameters for Field Group: Date of Birth

Field or Control	Description
Component	Displays the component selected for data masking in Setup Component Level Masking page.
Birth Date Record	Record storing Birth Date on the Component.
Birth Date Field	Field storing Birth Date on the Component.
Masking Format	Options available are: • *Complete*: Select to mask the entire birth date, for example, XX/XX/XXXX. • *Year*: Select to mask the birth year, for example, 01/01/XXXX.

Associated Fields for Field Group: Date of Birth

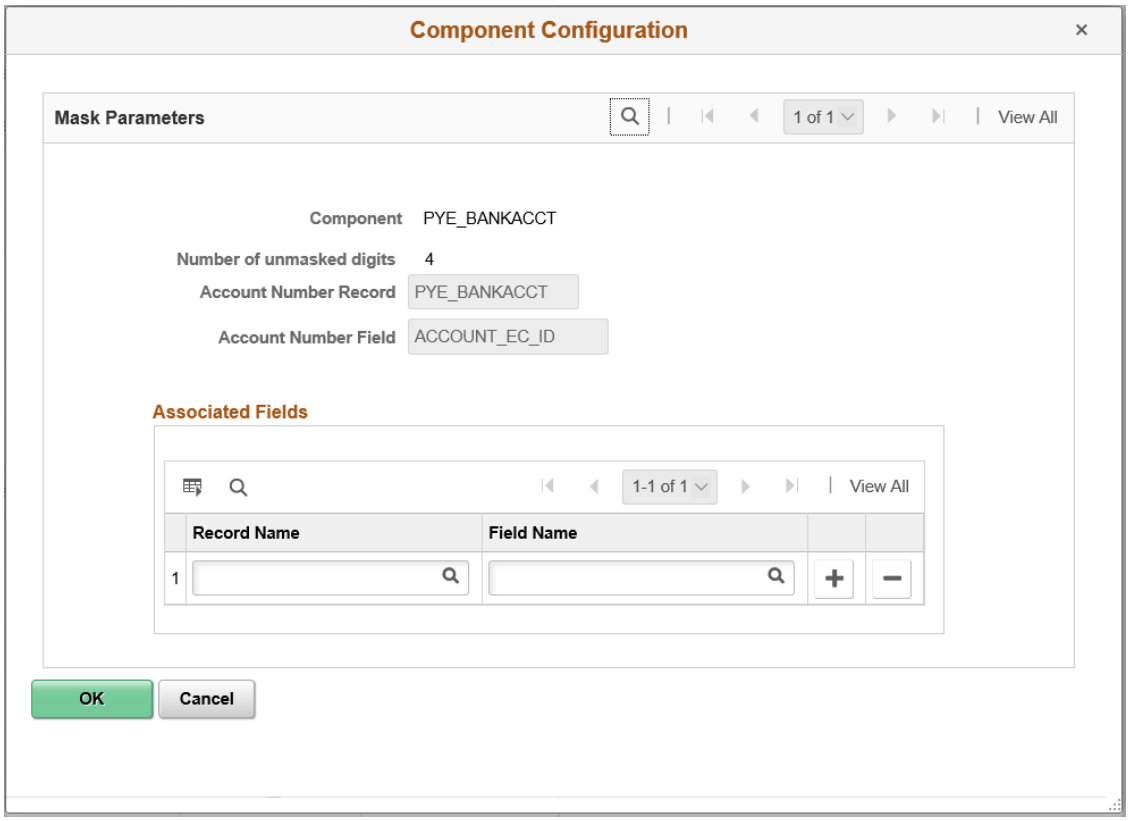
Field or Control	Description
Record Name	Search and enter record name of the field that displays any information derived or based on the sensitive field.
Field Name	Search and enter the field name from the lookup that displays any information derived or based on the sensitive field.

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Component Configuration (Account Number) modal

This example illustrates the fields and controls of the Component Configuration modal for the field group **Account Number** for the component **PYE_BANKACCT**.

This example illustrates the fields and controls of the Component Configuration modal for Account Number.



Mask Parameters

Field or Control	Description
Component	Displays the component selected for data masking in Setup Component Level Masking page.
Number of unmasked digits	Read Only: For Account Number, the last 4 digits are always unmasked.
Account Number Record	Record storing Bank Account Number on the Component.
Account Number Field	Field storing Bank Account Number on the Component.

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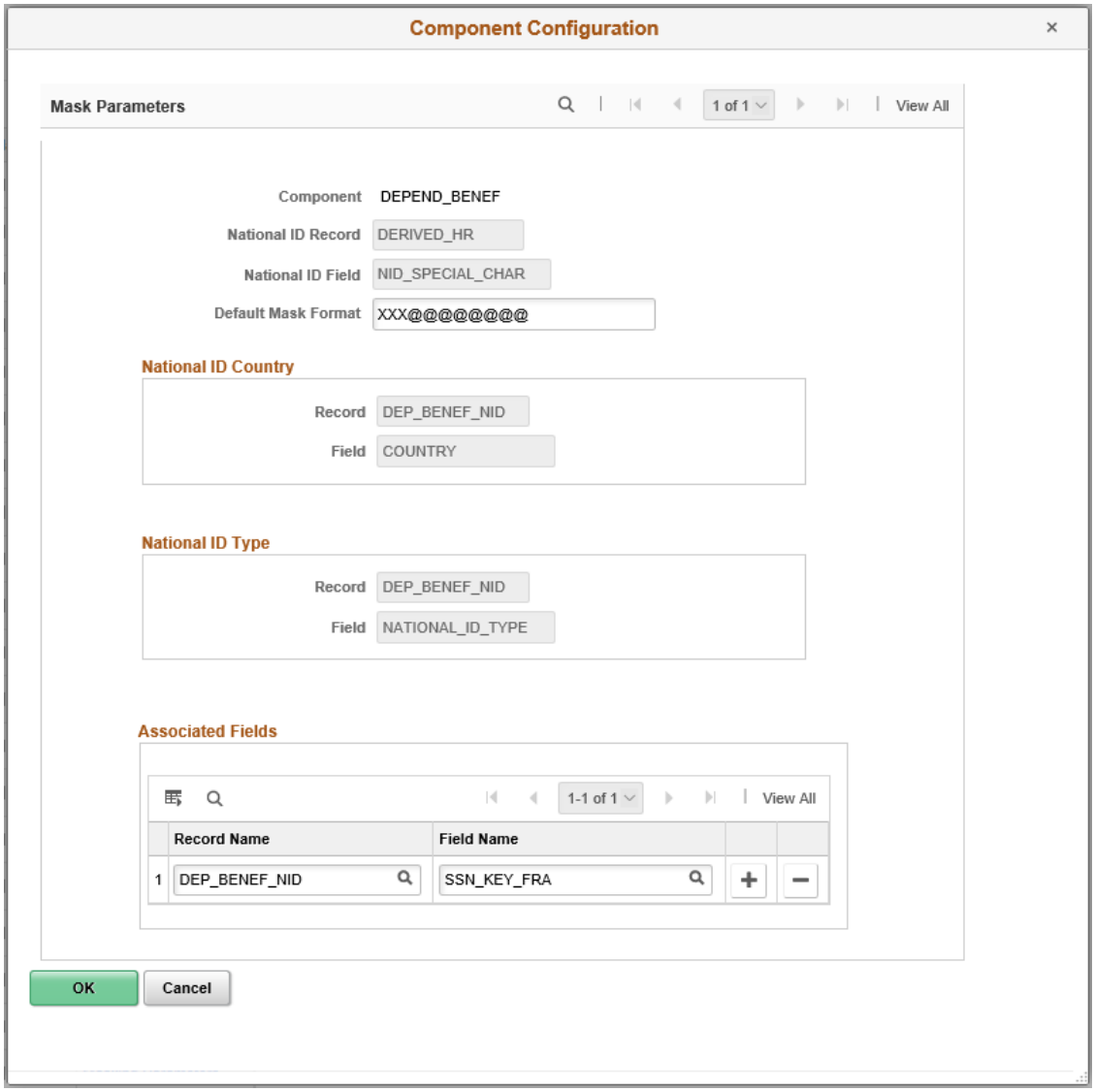
Associated Fields for Field Group: Account Number

Field or Control	Description
Record Name	Search and enter record name of the field that displays any information derived or based on the sensitive field.
Field Name	Search and enter the field name from the lookup that displays any information derived or based on the sensitive field.

Component Configuration (National ID) modal

For Field Group - National ID, Country and National ID Type - Records and Fields are configured along with the National ID Record and Field. This information is required to identify the Mask Format for National ID at the Transaction level.

This example illustrates the fields and controls of the Component Configuration modal for the field group **National ID** for the component **DEPEND_BENEF**.



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Mask Parameters

Field or Control	Description
Component	Displays the component selected for data masking in Setup Component Level Masking page.
National ID Record	Record storing National ID.
National ID Field	Field storing National ID.
National ID Mask Format	National ID mask format supports only @ and X. Use X at positions in the National ID that needs masking. The National ID mask format should match the National ID format in length Use @ for showing the input character at that position. For example, for National ID 123-12-1234, if Masking format XXX@XX@@@@@ is used, the masked output will be XXX-XX-1234. Use a single @ for showing unmasked National ID and a single X for masking the entire National ID while preserving the format. For the same example, completely masked output will be XXX-XX-XXXX. Default Mask Format will be used for masking only when • There is no Mask Format defined in National ID Type setup page for the Country and National ID Type selected in the Transaction Component. OR • There is no National ID Country and National ID Type Record and Field setup in Masking Parameters. In all other cases, the Mask Format defined in National ID Type page will be used.

National ID Country

Field or Control	Description
Record	Record storing Country to which National ID belongs.
Field	Field storing Country to which National ID belongs.

National ID Type

Field or Control	Description
Record	Record storing National ID Type for the National ID.
Field	Field storing National ID Type for the National ID.

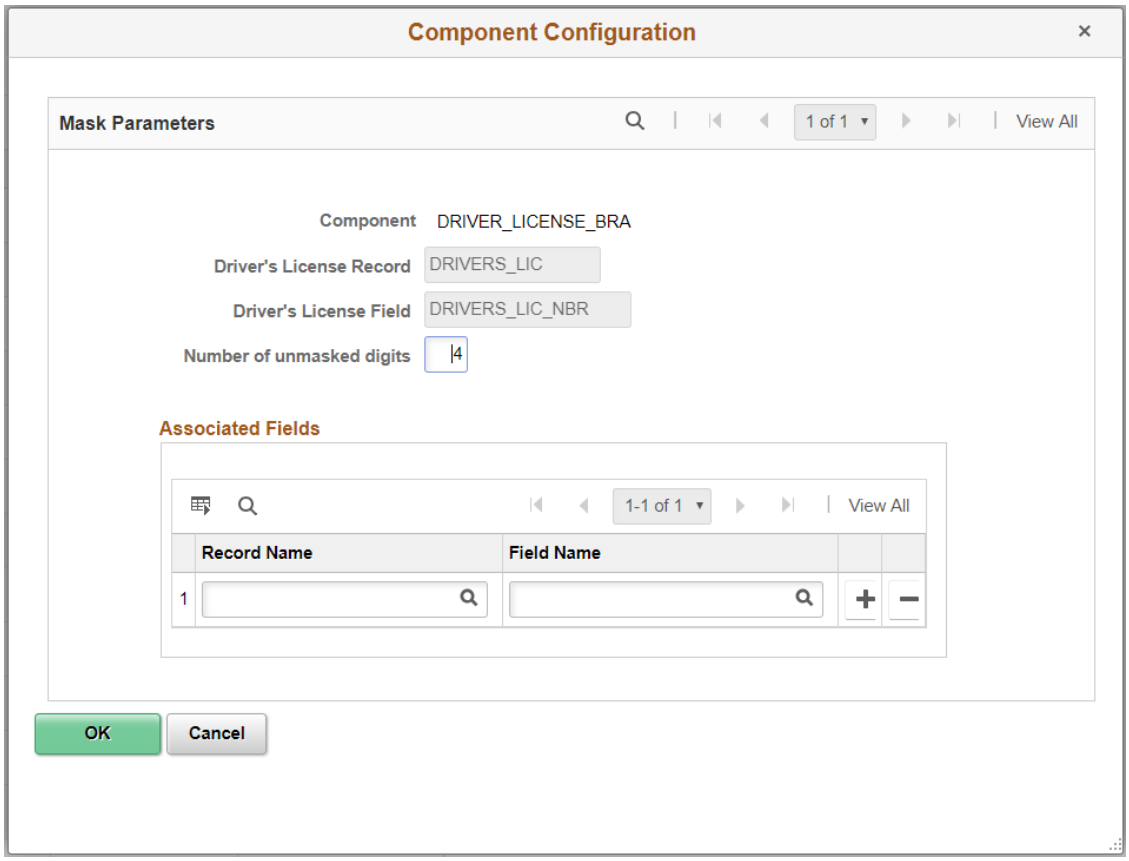
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Associated Fields for Field Group: National ID

Field or Control	Description
Record Name	Search and enter record name.
Field Name	Search and enter the field name corresponding to the record name.

Component Configuration (Driver's License Number) modal

This example illustrates the fields and controls of the Component Configuration modal for the field group **Drivers License Number** for the component **DRIVER_LICENSE_BRA**.

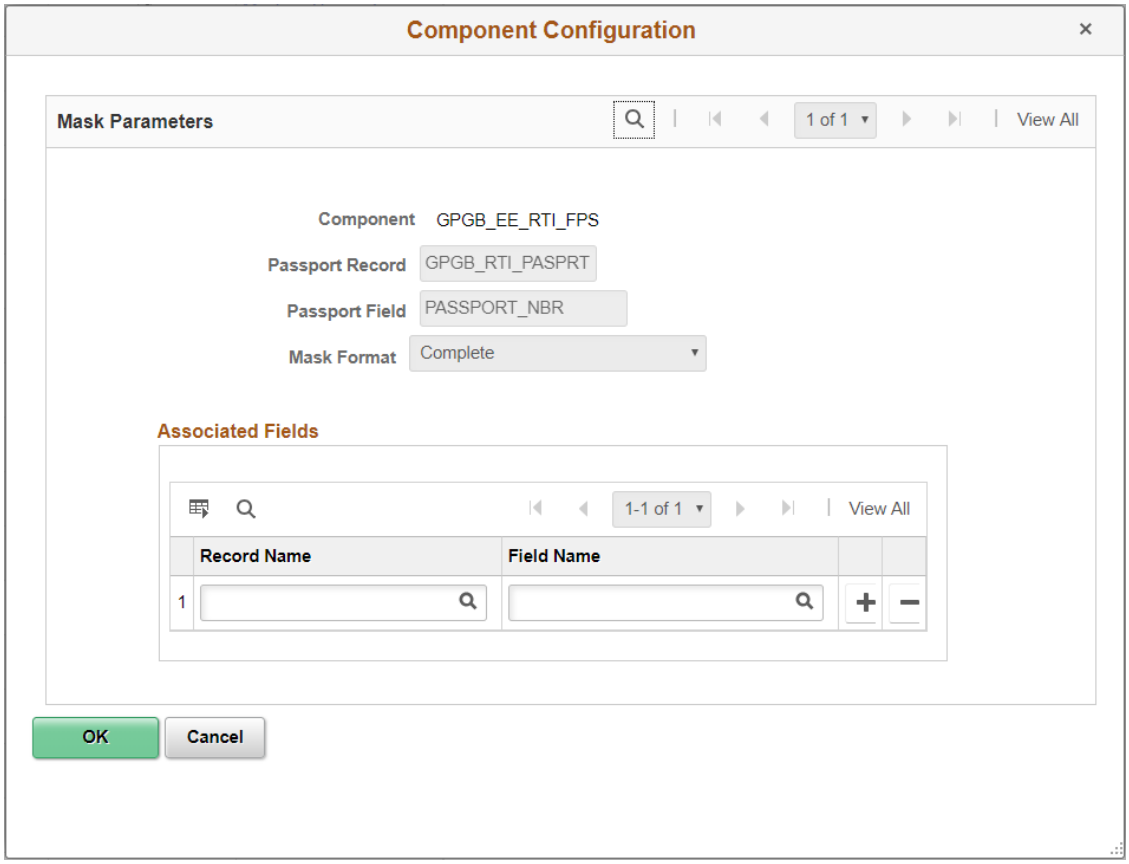


Field or Control	Description
Component	Displays the component selected for data masking in Setup Component Level Masking page.
Driver's License Record	Record storing Driver's License Number on the Component.
Driver's License Field	Field storing Driver's License Number on the Component.
Number of unmasked digits	For Driver's License Number, the last 4 digits are unmasked by default. This can be modified.

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Component Configuration (Passport Number) modal

This example illustrates the fields and controls of the Component Configuration modal for the field group **Passport Number** for the component **GPGB_EE_RTI_FPS**.



Field or Control	Description
Component	Displays the component selected for data masking in Setup Component Level Masking page.
Passport Record	Record storing Passport Number on the Component.
Passport Field	Field storing Passport Number on the Component.

List of Components Implementing Sensitive Data Masking

Component Name	Description	Field Group
ABSENCE_HISTORY	General Absence	Date of Birth
CAREER_DEPEND_SUMM	Immediate Family	Date of Birth
DEPEND_BENEF	Dependent/Beneficiary	Date of Birth
DEPEND_BENEF	Dependent/Beneficiary	National ID

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Component Name	Description	Field Group
DIRECT_DEPOSIT	Payment Distribution Bank/ Giro	Account Number
EMPLOYEE_SUMMARY	Employee Data Summary	Date of Birth
EMPLOYEE_SUMMARY	Employee Data Summary	National ID
EMPLOYEE_SUMM_BEN	Employee Data Summary	Date of Birth
EMPLOYEE_SUMM_BEN	Employee Data Summary	National ID
EMPL_MATR_BOOK_ITA	Empl Matricula Data - ITA	Date of Birth
EMPL_MATR_BOOK_ITA	Empl Matricula Data - ITA	National ID
FAMILY_AT_HOST	Family at Host	Date of Birth
GPCH_AB_EE_MATERN	Maternity Leave	Date of Birth
GPCH_CA_DATA	Child Benefits Data	Date of Birth
GPCH_CA_DATA	Child Benefits Data	National ID
GPCH_TX_DATA	Source Tax Data	Date of Birth
GPES_CRT_COL_RES	Create Collective Report ESP	National ID
GPES_EXPT_RSLT	Expatriate Results	National ID
GPES_PAYEE_DATA	ESP Payee Data	Date of Birth
GPES_PAYEE_DATA	ESP Payee Data	National ID
GPES_SSTC_COL_RES	Collective Report ESP	National ID
GPES_SSTC_IND_RES	Individual Report	National ID
GPES_TAX2_RSLT	Tax Results	National ID
GPFR_ATMP_ADMIN	ATMP Administrative Data	Account Number
GPFR_ATMP_ADMIN	ATMP Administrative Data	Date of Birth
GPFR_ATMP_ADMIN	ATMP Administrative Data	National ID
GPFR_ILLNESS_ADMIN	Illness/Maternity Admin Comp.	Account Number
GPFR_ILLNESS_ADMIN	Illness/Maternity Admin Comp.	National ID
GPGB_EDI_ADJ	EDI Adjustments	Date of Birth
GPGB_EDI_ADJ	EDI Adjustments	National ID
GPGB_EE_LOANS	Employee Loans	Date of Birth
GPGB_EE_LOANS	Employee Loans	National ID
GPGB_EE_LOAN_RV	Employee Loans Review	Date of Birth
GPGB_EE_LOAN_RV	Employee Loans Review	National ID
GPGB_EE_NI	UK National Insurance Data	Date of Birth
GPGB_EE_NI	UK National Insurance Data	National ID
GPGB_EE_P45	GPGB View P45	Date of Birth
GPGB_EE_P45	GPGB View P45	National ID
GPGB_EE_SS	Assign Share Schemes	Date of Birth
GPGB_EE_SS	Assign Share Schemes	National ID
GPGB_EE_SS_HOL	Share Scheme Contrib Holiday	Date of Birth
GPGB_EE_SS_HOL	Share Scheme Contrib Holiday	National ID
GPGB_EE_TAX	UK Tax Data	Date of Birth
GPGB_EE_TAX	UK Tax Data	National ID

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Component Name	Description	Field Group
GPGB_PSLIP_PU_PNLG	PU Payslip Component	National ID
GPGB_RTI_ADJ	RTI Adjustments	Date of Birth
GPGB_STDNT_LOAN	GP UK Student Loans	Date of Birth
GPGB_STDNT_LOAN	GP UK Student Loans	National ID
GPGB_TAX_CREDITS	GP UK Tax Credits	Date of Birth
GPGB_TAX_CREDITS	GP UK Tax Credits	National ID
GP_PMT_VIEW	Payments by Calendar Group	Account Number
HRS_MANAGE_APP	Find Applicants	Account Number
HRS_MANAGE_APP	Find Applicants	Date of Birth
HRS_MANAGE_APP	Find Applicants	National ID
HS_ILLNESS_GER	GER Illness Tracking	Date of Birth
IMMEDIATE_FAMILY	Immediate Family	Date of Birth
PERSONAL_DATA	Personal Data	Date of Birth
PERSONAL_DATA	Personal Data	National ID
PYE_BANKACCT	Bank Account Information	Account Number
SAMEN_NLD	Diversity Registration NLD	Date of Birth
TRVL_CMPNY_PD	Company Paid Travel	Date of Birth
TRVL_CMPNY_PD_DEP	Dependent Company Paid Travel	Date of Birth
WC_JCR_STATUS2_INQ	Review All Job Change Request	Date of Birth
WC_JOB_CHG_REQ_HR	Request Job Change	Date of Birth
WC_JOB_CHG_REQ_WC	Request Job Change	Date of Birth
DRIVERS_LICENSE	Drivers License	DL
DRIVER_LICENSE_BRA	Drivers License	DL
GPGB_EE_RTI_FPS	RTI FPS Employee Details	PASS
IDENTIFICATN_DATA	Identification Data	PASS
IDENTIFICATN_DEP	Dependent Identification	Data PASS

Setting Up and Assigning Tree-Based Data Permission

To set up and use tree-based data permission, use the Tree Manager component (PSTREEMGR), Security Tree Audit Report component (RUNCTL_PER506), Security by Dept Tree component (SCRTY_DATA), and Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

These topics provide an overview of the data permission security by department security trees and discuss how to manage tree-based data permission.

> **Note**
>
> After you assign a row security permission list to a user, you must run the Refresh SJT_OPR_CLS process.

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See Refresh SJT_OPR_CLS Page.

Pages Used to Set Up and Assign Tree-Based Permission

Page Name	Definition Name	Usage
Tree Manager Page	PSTREEMGR	Set up or modify department security trees. You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.
Security Tree Audit Report Page	RUNCTL_PER506	Create a list of discrepancies between the data you've entered in the Departments component and the departments you've added to the current security tree.
Security by Dept Tree Page	SCRTY_TABL_DEPT	Grant tree-based department data access to row security permission lists.
Refresh SJT_CLASS_ALL Page	SCRTY_OPR_RC	Run the Refresh SJT_CLASS_ALL process when you create or modify a security tree or when you create or modify a row security permission list to update SJT_CLASS_ALL with the user security data.

Understanding Data Permission Security by Department Security Trees

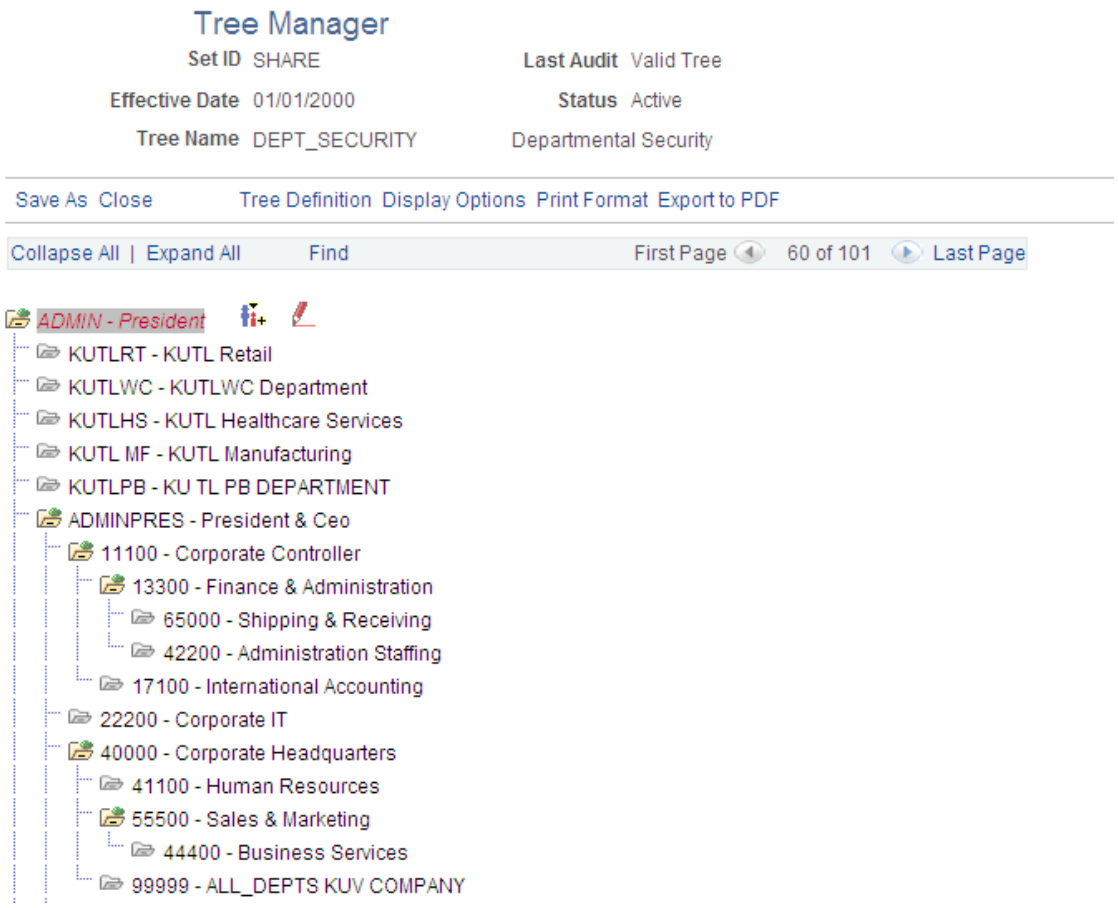
Each security set has a tree-based security access type. Tree-based security access types use department security trees to set up a hierarchy of your departments and enable you to use this hierarchy to simplify data assignment.

You use PeopleSoft Tree Manager to build a hierarchy of department security for an organization. A security tree provides a graphic means to grant and restrict access to data. The security tree doesn't have to represent your organization's hierarchy exactly, although it is usually very close.

To grant a row security permission list access to a group of departments, you grant access to the department to which all of those departments report. You can restrict access to individual departments or to a group of departments if you need to. This is an example of a department security tree for the SHARE set ID:

This example illustrates a portion of the SHARE department security tree.

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Using this security tree you could, for example, grant a row security permission list access to department 13000 and the system includes department 13000 and all the departments that report to it, giving the permission list access to everyone in all fourteen finance departments.

You can also restrict access to one of the branch entities. For example, if a row security permission list needs access to everyone in Finance except for Business Services, grant access to department 13000, but restrict access to department 15000, giving access to departments 13000, 20000, 22000, 25000, 27000, and 31000.

> **Note**
>
> You can only grant tree-based data permission to row security permission lists.

Before you work with data security and PeopleSoft Tree Manager, make sure that human resources data is defined in the PeopleSoft HCM control tables.

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> **Warning**
>
> Before you create or modify a security tree, we recommend that you review the *PeopleTools: PeopleSoft Tree Manager* for a detailed discussion of using PeopleSoft Tree Manager because this section does not provide a complete overview of the application. Security is an important component of your system, and it is crucial that you understand all aspects of PeopleSoft security and its tools before you implement it.

See Setting Up and Assigning Tree-Based Data Permission.

See Assigning Role-Based Data Permission Security to Permission Lists.

See *PeopleTools: PeopleSoft Tree Manager*

Security Trees and Departments

For the purpose of building department security trees, PeopleSoft defines all entities in an organization—from companies to departments—as departments. The department data is created and stored in the Departments component (DEPARTMENT_TBL), which you can access from PeopleSoft Tree Manager or the Set Up HCM menu. You assign security access based on these departments so define each entity in your organization in the Departments component so that you can add its department ID code to the security tree.

Trees are built with levels and nodes:

- Levels are the levels of the hierarchy.
- Nodes, representing organizational entities, are added at different levels to indicate their place in the hierarchy.

For example, the first level of your tree might be the company level. The second level might be the regional level. A node that is added at the first level is a company-level node and represents the company department. A node that is added at the second level is a regional-level node and represents a regional department, such as an office. The first node in your organization is the root node. This is the highest node in the hierarchy. All other nodes (departments) report up to the root node.

Access to data is based on the hierarchy that you create. If you grant access to a department, you also grant access to each department that reports to that department.

> **Note**
>
> You should include inactive departments on your security tree; otherwise, data for retired, terminated, or transferred people who used to be in inactive departments will be inaccessible.

See Maintaining Departments.

Security Trees and Effective Dates

All security trees are called DEPT_SECURITY. Security trees are uniquely identified by their set ID and effective date.

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You can create future-dated trees to reflect a change in your reporting structure and you may want to grant access using the newer tree (or, perhaps, to a historical tree).

When you assign data to a permission list on the Security by Dept Tree page select the date as of which you want the trees to be effective. When you add a row in the Define Security Profile grid on the Security by Dept Tree page and select the set ID of the security tree, the system references the security tree that is effective as of the date you selected in the As of Date for the Trees field.

For example, it is now April, 2005 and you have created a future-dated security tree for the SHARE set ID dated January 1, 2006. You wish to try out the data permission using the new tree. On the Security by Dept Tree page, enter January 1, 2006 (or a higher date; the date does not have to be the exact effective date of the tree) in the As of Date for the Trees field. Add a row in the Define Security Profile grid and select the SHARE set ID. The system displays January 1, 2006 in the Effective Date field in the grid and uses the future-dated tree to enforce data permission for that permission list.

When the future-dated tree becomes effective, the system does *not* automatically update the security profiles of permission lists referencing the old tree. For example, on January 1, 2006, the system continues to use the previous SHARE tree to enforce data permission for all the permission lists that were referencing it.

To update the permission lists so that they reference the new tree, enter the Security by Dept Tree page, enter the date January 1, 2006, and click the Refresh Tree Effective Date button. The system will update the effective dates of all the trees referenced by that permission list to the dates the trees effective as of January 1, 2006.

Creating and Modifying Security Trees

You can create a security tree automatically or manually.

Use the Tree Manager page (PSTREEMGR) to use to set up or modify department security trees.

You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.

Navigation:

Tree Manager, and then **Tree Manager**, and then **Tree Manager**

Creating Security Trees Manually

The steps for creating a tree manually are described in the *PeopleTools: PeopleSoft Tree Manager.* When you create a security tree, enter the following data on the Tree Definition and Properties page (PSTREEDEFN):

Field	Description
Tree Name	Enter *DEPT_SECURITY.*
Structure ID	Select *DEPARTMENT.* PeopleSoft delivers the system with this structure ID set up.
Description	Enter a description of the tree.
Set ID	Select the set ID of the departments that you will add to the tree.
Effective Date	Enter the date that the tree becomes effective. Add only the departments that are effective on or before this date.

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Field	Description
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select one of the following options: • *Strictly Enforced* Your levels consist of only one type of entity. For example, only regions report to the company level and only divisions report to the regional level. • *Loosely Enforced* The entities combine different types of entities. For example, both regions and divisions report to the company level. • *Not Used* Your security structure is flat, and you don't need to set up groups of units in levels.
All Detail Values in this Tree	Leave blank.
Allow Duplicate Detail Values	Leave blank.

Once you've created the basic tree structure, you begin to add nodes. In a security tree, each node represents a business entity in your organization. You define nodes on the Departments component, creating a department for each business entity in your organization.

You must have a node for every department in the set ID. You can add nodes to your trees as you add departments to your organization.

To add a new, future-dated departments in order to maintain data security for people added to the new departments, create a future-dated security tree. This will enable you to add people to the new department before it becomes effective and still be able to control access to their data in the present.

Creating Security Trees Automatically

You can create a security tree using an existing organizational structure. Use the following Structured Query Report (SQR) procedure to import the existing hierarchy and build your security tree. You import your department data into a temporary Department Table, and the system uses that data to build the security tree.

To set up a hierarchy of departmental entities and build your data security tree automatically:

1. Import the entity data.

   Import the entity data into the temporary table R_PER507 using the PeopleSoft Import utility, a Structured Query Report (SQR), or another batch facility. You load department data into this temporary table, so before you use this utility, you must establish the reporting hierarchy for all the departments in your organization. To do this, use the **REPORTS_TO_DEPT** field in the R_PER507 temporary table. R_PER507 is included with PeopleSoft HCM; it looks like DEPT_TBL, but it includes the following additional columns:

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New Column	Description
SETID_RPDEPT	Specifies the set ID of the department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
REPORTS_TO_DEPT	Specifies department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
ORGCODEFLAG	Indicates whether the department is selected for processing as of a particular date. The system populates this column based on your department data and the REPORTS_TO_DEPT field values.
ORGCODE	Designates the position of the department in the hierarchy. The system populates this column based on your department data and the REPORTS_TO_DEPT field values.
TREE_LEVEL_NUM	Temporary work column.
PARENT_NODE_NUM	Temporary work column.
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

   Run PER507 to set up the reporting hierarchy of your tree. This utility determines whether a department is active or inactive as of the date that you enter when you run the utility, and populates the **ORGFLAG** column in R_PER507 accordingly. The utility creates a structured organization code based on the *REPORTS_TO_DEPT* field values that you loaded and populates **ORGCODE** accordingly. This utility uses the **ORGCODE** values to set up the department hierarchy.

3. Build the department security tree.

   Run PER508 to build your DEPT_SECURITY tree. The effective date of the tree is the latest effective date of the departments that were processed in step 2.

   > **Note**
   >
   > To set up multiple trees to represent security or organizational structures at different points in time, perform step 2 for each tree, setting the **As of Date** each time, and perform this step again.

4. Transfer department data into the department component.

   Run PER509 to transfer the information that you set up in R_PER507 into DEPT_TBL. You can't view or update the Department component until you run this utility.

5. Renumber and insert numbered gaps in the security tree.

   Run PTUGAPTR.SQR to renumber the nodes in your tree and insert numbered gaps between the nodes.

Modifying Security Trees

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You

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also need to run the Refresh SJT_CLASS_ALL process to update the data access profiles and security join tables.

See Refresh SJT_CLASS_ALL Page.

Renumbering Gaps in Security Trees

PeopleTools assigns each node a number and reserves a series of unused numbers, called gaps, which the system uses to make changes to sections of a security tree. When you move a node, the system renumbers the nodes that appear to the right of the node that you moved (the children of the node that you moved). When you save changes to a tree, the system saves only the parts of the tree that have changed.

To refresh the unused numbers in the gaps between nodes, run the PTUGAPTR.SQR utility. Refresh unused numbers when:

- You load your security tree structure.
- You modify your security tree.
- An error message tells you to gap your tree.

Security Tree Audit Report Page

Use the Security Tree Audit Report page (RUNCTL_PER506) to create a list of discrepancies between the data you've entered in the Departments component and the departments you've added to the current security tree.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Tree Audit Report**, and then **Security Tree Audit Report**

After you build your security tree, we recommend that you run an audit (PER506.SQR) to determine which department IDs are in the Departments component, but not in the security tree, and which IDs are in the security tree, but not in the Department component. You cannot implement tree-based security for new departments until you add them to your security tree. This audit ensures that you add each department in your system to the security tree.

Security by Dept Tree Page

Use the Security by Dept Tree page (SCRTY_TABL_DEPT) to grant tree-based department data access to row security permission lists.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security by Dept Tree**, and then **Security by Dept Tree**

This example illustrates the fields and controls on the Security by Dept Tree page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Refresh Tree Effdts by (refresh tree effective dates by)	The system will reference the trees that are effective as of this date when you select a tree set ID in the Define Security Profile grid. Select a date in the future to reference a future-dated tree. For example, to use the department security trees that are current as of today's date, enter today's date in this field.
Refresh Tree Effective Dates	Select to refresh the trees listed in the Define Security Profile grid to trees that are effective as of the date in the As of Date for Trees field. **Note:** To ensure that your row security permission lists use the current trees you must enter the appropriate as of date and click this button whenever you create a more recent version of a set ID's security tree.

Define Security Profile

Field or Control	Description
Set ID and **Dept ID** (department ID)	Enter the tree set ID and the ID of the department that you are granting access to. The row security permission list has access to each department ID that reports up to this one on the security tree (unless you specify otherwise) so you don't have to select each department ID individually.

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Field or Control	Description
Access Code	Indicate what kind of access the row security permission list has to the data for this department ID. To restrict access to one or more departments that report up to a department ID that you've granted access to, insert a row and select the restricted department's ID and then select an Access Code of *No Access*. You need to restrict access explicitly only for department IDs that report up to the department ID to which you want to grant access. Otherwise, the row security permission list doesn't have access to a department unless it or the department to which it reports has been granted access on this page.
Effective Date of Tree	Displays this set ID's tree effective date. Make sure that the effective date of the tree is accurate. The system will not update the effective date automatically if you make a newer version of a tree. To update trees, enter the date as of which the tree is effective in the **Refresh Tree Effdts by** field and click the **Refresh Tree Effective Dates** button.

Refresh SJT_CLASS_ALL Page

Use the Refresh SJT_CLASS_ALL page (SCRTY_OPR_RC) to run the Refresh SJT_CLASS_ALL process when you create or modify a security tree or when you create or modify a row security permission list to update SJT_CLASS_ALL with the user security data.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh SJT_CLASS_ALL**, and then **Refresh SJT_CLASS_ALL**

Whenever you add or modify a tree or add or modify a row security permission list on the Security by Dept Tree component you need to run the Refresh SJT_CLASS_ALL process to update SJT_CLASS_ALL with the new user security data.

You can access the new or modified tree on the Security by Dept Tree page before you run this process so if you are creating a tree and then using it on a new or existing permission list you only need to run the process once, as long as you refresh the appropriate rows.

See Refresh SJT_CLASS_ALL Page.

Assigning Role-Based Data Permission Security to Permission Lists

To assign data permission security to role-based permission lists, use the Security by Permission List component (SCRTY_CLASS).

This topic discusses how to assign data permission security by field value to permission lists.

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Page Used to Assign Role-Based Data Permission Security to Permission Lists

Page Name	Definition Name	Usage
Security by Permission List Page	SCRTY_CLASS	Grant data permission security by field values to role-based permission lists.

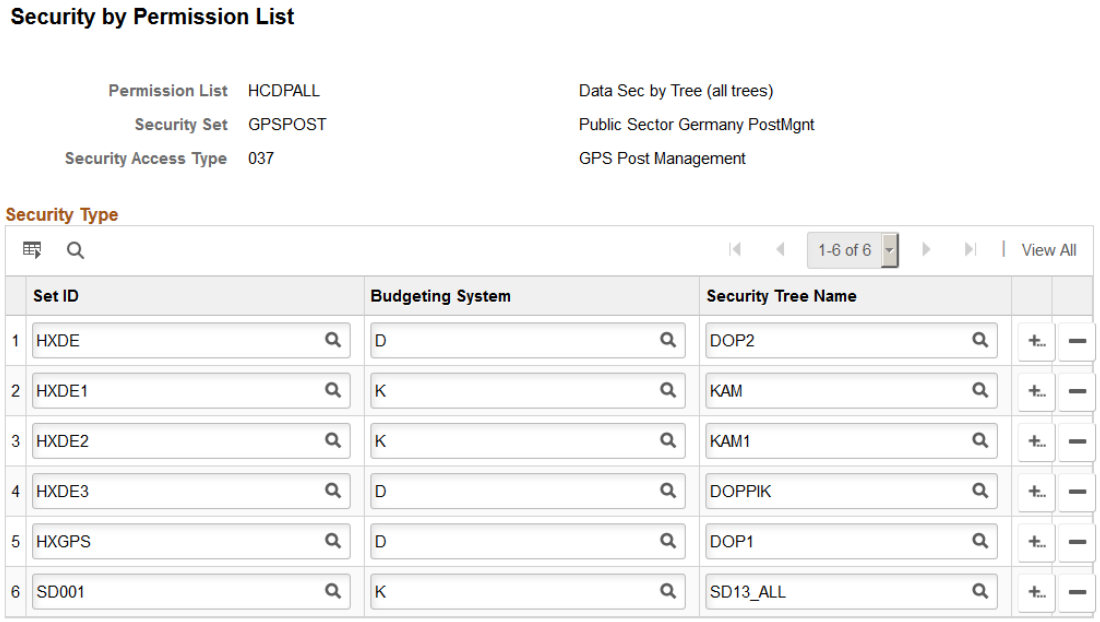
Security by Permission List Page

Use the Security by Permission List page (SCRTY_CLASS) to grant data permission security by field values to role-based permission lists.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security by Permission List**, and then **Security by Permission List**

This example illustrates the fields and controls on the Security by Permission List page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Security Set	Select the security set whose data you want to secure with this permission list. To secure the data of more than one set, add more security set rows.

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Field or Control	Description
Security Access Type	Select the security access type. The system only lists those types enabled for the security set. You can use more than one access type to set data permission for a permission list. **Note:** You cannot use tree-based security types on this page. **Note:** The security access type 031 (Recruiting Team) works with the assignments on a job opening to grant access.

Security Type

Fields in this group box will vary based on the security set and access type you are managing.

Select the transaction security value or values to which this permission list has access for this security set and access type.

For example, to give a permission list data permission access to recruiting job openings in certain locations, select the appropriate permission list, the security set RSOPN and the security access type 013–RS Location. To select a location, you first must select a business unit that has security access to the location, then select the location. Add more rows to select more business unit / location combinations.

Refreshing Security Join Tables

To refresh security join tables, use the Nightly SJT Refresh Process component (SCRTY_SJTDLY_RC), Refresh Trans. SJT tables component (SCRTY_SJT_RC), the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC), and the Refresh SJT_OPR_CLS component (SCRTY_OPRCLS_RC).

These topics describe when to use and how to run the security refresh processes.

Pages Used to Refresh Security

Page Name	Definition Name	Usage
Nightly SJT Refresh Process Page	SCRTY_SJTDLY_RC	Refresh the transaction security join tables to capture data changes that were not automatically loaded into the table. Run shortly after midnight to capture effective-dated changes.
Refresh Trans. SJT tables Page	SCRTY_SJT_RC	Refresh some or all of the data in the transaction-based security join tables to capture data changes that were not automatically loaded into the table.

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Page Name	Definition Name	Usage
Refresh SJT_CLASS_ALL Page	SCRTY_OPR_RC	Refresh some or all of the data in the SJT_CLASS_ALL table to capture changes to permission lists that were not automatically loaded into the table.
Refresh SJT_OPR_CLS Page (security operator class)	SCRTY_OPRCLS_RC	Refresh some or all of the data in the SJT_OPR_CLS to capture the current relationship between user profiles and permission lists.

Understanding When to Run the Refresh Processes

PeopleSoft HCM core row level security has four refresh processes. Use the refresh processes to keep your security data up to date so that the system is enforcing data permission using the most current information.

> **Important**
>
> The refresh processes are designed to refresh each row included in the process definition in sequence, causing the system to take an exceptionally long time to run the process when there are a large number of rows. To improve performance, we recommend clearing the **Refresh All Rows** check boxes on the run control pages and creating more defined run controls to run concurrently. (For example, create a run control for each permission list and run them simultaneously, rather than refreshing all permission lists under a single run control). You can save the run controls and use them as often as necessary.

Nightly Refresh SJT

Run the Nightly Refresh SJT process nightly to refresh the transaction security join tables. The nightly refresh process:

- Updates the transaction security join tables with any changes to transaction security data that bypassed the SavePostChange PeopleCode.

  The system automatically updates the transaction security join tables when you make and save a change on the transaction components, either by manual entry or a mass update that triggers the component interface. If you bypass the PeopleCode, you will need to capture the changes using a refresh process.
- Updates the security join table with future-dated security rows that have become current (when the current calendar date matches up with the effective date of the transaction record) because SavePostChange PeopleCode is not triggered when a future-dated row becomes current.
- If you are using future-dated security rows deletes the old security row and makes the future-flagged row the current row.

Run this process nightly for every security set you are using.

See Nightly SJT Refresh Process Page.

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SJT Refresh

Run the SJT Refresh process to refresh the transaction security join tables.

You will need to refresh the tables using this process when you:

- Enable or disable a security access type.

  When you enable a security access type, you need to load the transaction security data for that type into the security join table.

  You need to run it when you disable a security access type in order to clear the security join table of the transaction security data. You won't compromise your security if you don't run it but you will improve performance by removing the unnecessary rows.
- Update the transaction components using a process that bypasses the component interfaces.

  The Nightly Refresh SJT process also captures this data but you may want to refresh the tables immediately rather than waiting for a scheduled run.

You can run this process for all security sets at once, individually, or by a smaller grouping of data.

See Refresh Trans. SJT tables Page.

Refresh Row Security Operator

Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL.

You will need to refresh SJT_CLASS_ALL using this process when you:

- Modify a security access type.

  Modifications include selecting to use future-dated security rows or changing the job data security options.
- Create or modify a department security tree.
- Create or modify a row security permission list on the Security by Dept Tree component.

  Modifications include adding or removing data permission and refreshing the effective dates of trees.

See Refresh SJT_CLASS_ALL Page.

Refresh SJT_OPR_CLS

Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS.

You will need to refresh SJT_OPR_CLS whenever you create or change the relationship between a user profile and a permission list with data permission. Run the process when you:

- Clone a user profile that has data permission.
- Add a row security permission list that has data permission to, or delete one from, a user on the User Profile - General page.
- Add a role with permission lists with data permission to, or delete one from, a user.
- Add a permission list with data permission to, or delete one from, a user-assigned role

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> **Note**
>
> SavePostChange PeopleCode on the Security by Dept Tree component and the Security by Permission List component updates SJT_OPR_CLS when you add a permission list to either component for the first time. If you add a permission list to the user first, either in the Row Security field or by way of a role, and then add it to the Security by Dept Tree page or Security by Permission List page, you do *not* need to run the process.

You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS.

PeopleSoft does not deliver the system with these messages enabled in order to prevent unnecessary publishing. If you would like to use them, follow these steps:

1. Uncomment the following PeopleCode found in the USERMAINT.GBL SavePostChange PeopleCode.

```
/*
If %Mode="A" Then
    %MSG.CopyRowset(&USERPROFILECHANGE);
    &MSG.Publish();
Else
    &MSG.CopyRowsetDelta(&USERPROFILECHANGE);
    &MSG.Publish();
End-If,*/
```

2. Use PeopleSoft Application Designer to activate the USER_PROFILE and ROLE_MAINT messages by:
    a. Opening each message.
    b. Click on the Properties icon.
    c. Select the User tab.
    d. Select the Active check box.
3. Use PeopleSoft Application Designer to activate the handler/application class for the USER_PROFILE and ROLE_MAINT messages:
    a. Open each message.
    b. Under Message Subscriptions, select HCM_Refresh_SJT_OPR_CLS (for USER_PROFILE) or HCM_ROLE_REFRESH_SJT_OPR_CLS (for ROLE_MAINT), right click, and select Message Subscription Properties.
    c. Select the Active check box.
4. Confirm that the queues are running:
    a. Select **PeopleTools**, and then **Integration Broker**, and then **Monitor Integrations**, and then **Monitor Message.**
    b. On the Monitor Message - Channel Status page (AMM_CHNL_STATUS), scroll down until you locate both the USER_PROFILE and ROLE_MAINT channels.
    c. Confirm that both channels have a status of *Running.*
5. Make the USER_PROFILE and ROLE_MAINT messages active on the HCM node by:

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a. Select **PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Node Definitions.**

b. On the Node Definitions - Transaction page (IB_NODETRXLIST), change the status of each message to *Active.*

See Working with HCM Local Integrations.

See Refresh SJT_OPR_CLS Page.

Refresh Processes by Action

This table indicates which refresh processes you should run when implementing HCM security:

Action	Refresh SJT_CLASS_ALL	SJT_Refresh
Make changes to the implementation settings on the Security Installation Settings page.	Run	Run
Enable a security access type.		Run
Disable a security access type.	Run	Run
Modify an enabled security access type (for example, by selecting or deselecting the **Include Future Dates** check box).	Run	Run

This table indicates which refresh processes you should run when using security trees and creating and modifying row security permission lists:

Action	Refresh SJT_CLASS_ALL
Create a department security tree.	
Create a new effective-dated version of an existing tree.	
Note: You do not need to refresh SJT_CLASS_ALL yet because you'll have to update the data permission lists to reference the new tree. You'll run the SJT_CLASS_PROCESS then.	
Modify a department security tree *without* changing the effective date.	Run
Add a new permission list to the Security by Dept Tree page and add to it data permission.	Run
Modify the data permission of a permission list on the Security by Dept Tree page.	Run
Refresh the effective date of the trees on the Security by Dept Tree page because you created a new effective-dated version of an existing tree.	Run

This table indicates which refresh processes you should run when creating and modifying row security permission lists:

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Action	Refresh SJT_CLASS_ALL
Add a new permission list to the Security by Permission List page and add to it data permission. **Note:** The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	
Modify the data permission of a permission list on the Security by Permission List page. **Note:** The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	

This table indicates which refresh processes you should run when you add, delete, or modify a user's data permission:

> **Note**
>
> This table assumes that you have not enabled the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.
>
> If these messages are enabled, the system updates SJT_OPR_CLS and you do not need to run the refresh process following any of these actions.

Action	Refresh SJT_OPR_CLS
Add a row security permission list to a user profile on the User Profile – General page.	Run
Delete a row security permission list from a user profile on the User Profile – General page.	Run
Change a row security permission list on a user profile on the User Profile – General page.	Run
Create a new user profile by copying an existing profile that has permission lists with data permission (whether by the Copy User Profiles page, the Create Users process, or the Create Row Security - Dept Mgr process).	Run
Add a role-based permission list (one that has data permission from the Security Permission List page) to a role that is already assigned to a user.	Run
Delete a role-based permission list (one that has data permission from the Security Permission List page) from a role that is already assigned to a user.	Run
Add a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) to a user profile.	Run

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Action	Refresh SJT_OPR_CLS
Delete a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) from a user profile.	Run
Add a permission list that is already assigned to a user (by way of a role) to the Security by Permission List page and give it data permission.	
Add a permission list that is already assigned to a user on the User Profile – General page to the Security by Dept Tree page and give it data permission.	

This table indicates which refresh processes you should run when you add, delete, or modify the following transaction security data:

- Job data record for a person.
- Person of interest record for a person.
- Department.
- Job opening.

Action	SJT Refresh process
Add, delete, or modify an existing transaction record.	
Create a future-dated transaction record.	
Using a mass update process that triggers the component interfaces, create, delete, or modify multiple transaction records	
Using a mass update process that does not trigger the component interfaces (or otherwise bypass the component interface on the transaction record), create, delete, or modify multiple transaction records.	Run

Nightly SJT Refresh Process Page

Use the Nightly SJT Refresh Process page (SCRTY_SJTDLY_RC) to refresh the transaction security join tables to capture data changes that were not automatically loaded into the table.

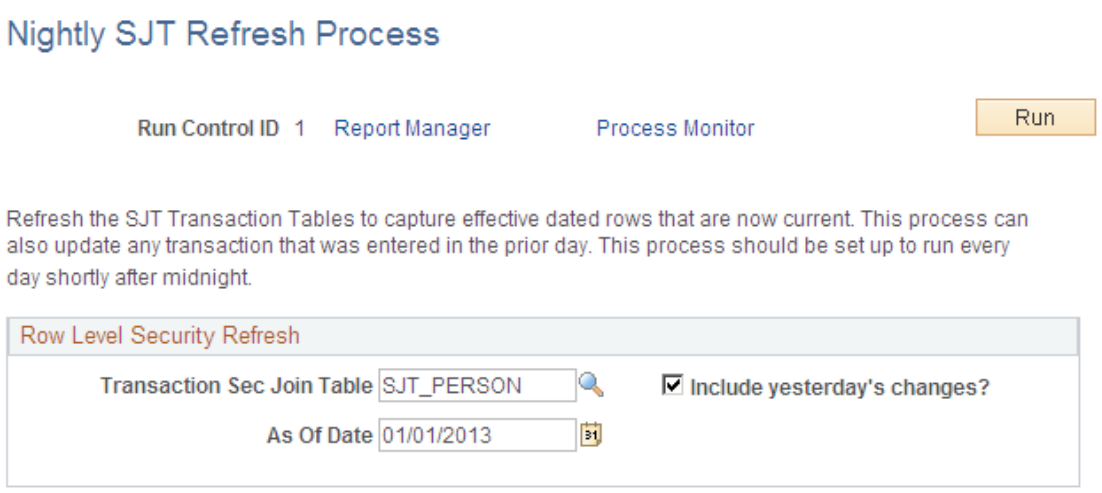
Run shortly after midnight to capture effective-dated changes.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Nightly SJT Refresh Process**, and then **Nightly SJT Refresh Process**

This example illustrates the fields and controls on the Nightly SJT Refresh Process page. You can find definitions for the fields and controls later on this page.

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Set up this process to run every night shortly after midnight using a recurring schedule and leaving the As Of Date field empty. By running the process shortly after midnight, you capture the formerly future-dated rows that have just become effective.

Field or Control	Description
Transaction Sec Join Table	Select the transaction security join table to update.
Include yesterday's changes?	Select to include the previous day's changes. The program searches the system for any changes to the transaction records on the previous day and updates the transaction security join tables with those changes. This ensures that any changes that were made to the data outside of components or component interfaces are captured. If you do not select this check box, the process will only update the transaction security join tables with the changes made on the as of date. **Note:** It is recommended that you select this option every time you run this process to guarantee that you are updating the transaction security join tables with the latest information. Only deselect the check box if you are experiencing performance issues and you are certain that the records are not being updated outside of the regular user interface or component interfaces.
As Of Date	Leave the as of date blank when you schedule this run control ID to run on a recurring basis. The system will use the current, system date each time it runs.

Refresh Trans. SJT tables Page

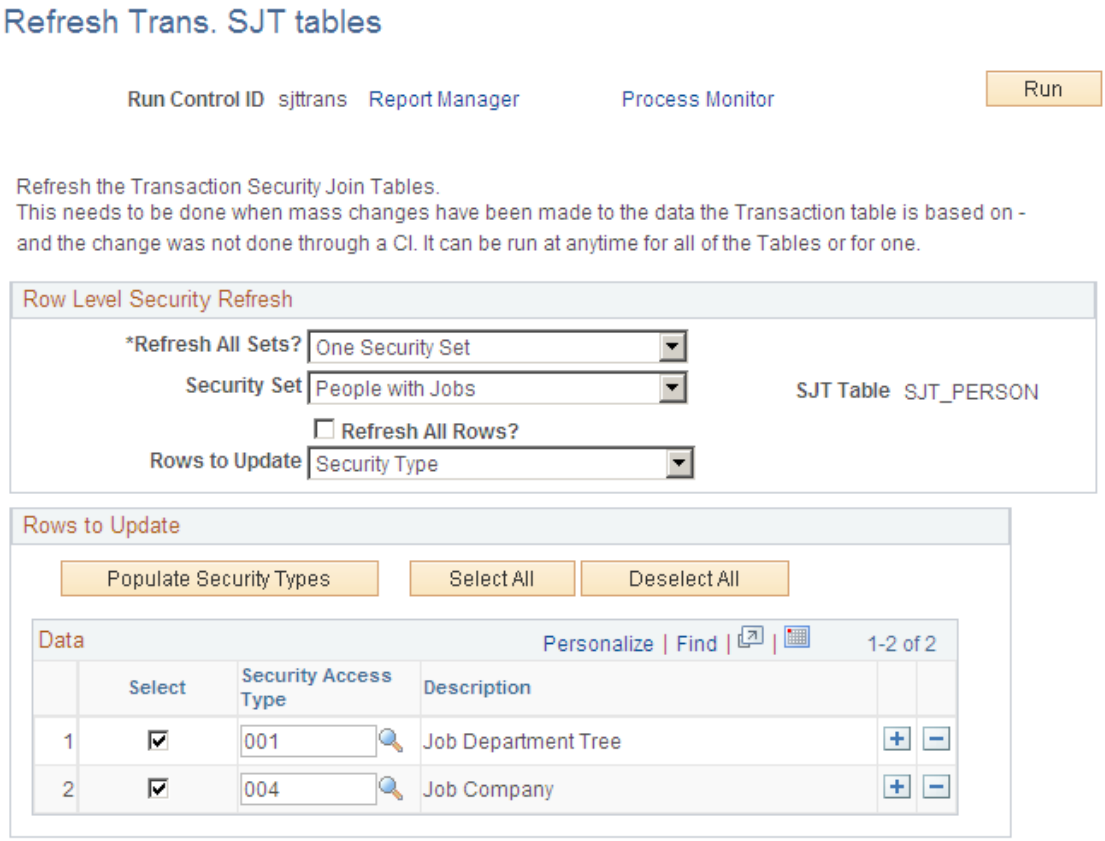
Use the Refresh Trans. SJT tables page (SCRTY_SJT_RC) to refresh some or all of the data in the transaction-based security join tables to capture data changes that were not automatically loaded into the table.

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Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh Trans. SJT tables**, and then **Refresh Trans. SJT tables**

This example illustrates the fields and controls on the Refresh Trans. SJT tables page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Refresh All Sets?	Select *All Security Sets* to refresh all security sets. Select *One Security Set* to refresh one security set.
Security Set and **SJT Table**	If you are refreshing one security set, select the set. The system displays the transaction security join table associated with the security set.
Refresh All Rows?	Select to refresh every row in the security join table. Deselect to refresh select rows in the security join table. The system displays the **Rows to Update** grid.
Rows to Update	Select the rows to update. The options available are the ones you selected for the security set on the Security Sets component.

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Rows to Update

The fields and buttons in the **Rows to Update** grid will vary depending on the rows you select to update in the **Rows to Update** field. Enter the rows of data you want to update.

For example, if you select *Security Type* in the **Rows to Update** field, select the security types whose transaction data you want to refresh.

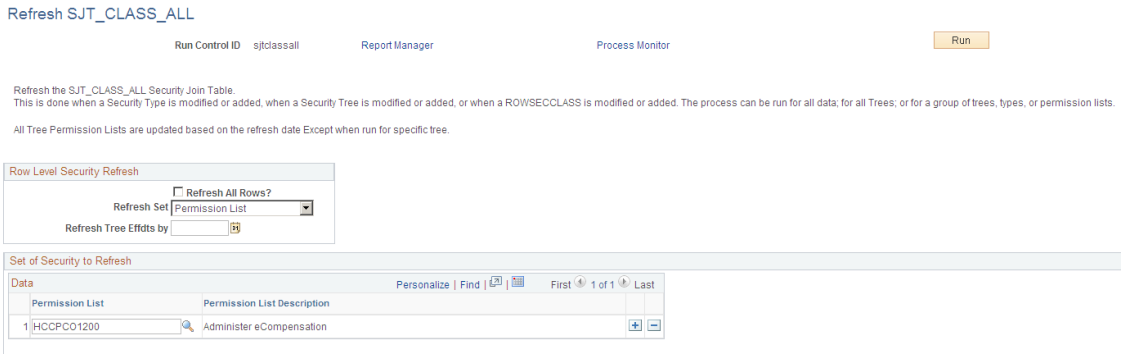
Refresh SJT_CLASS_ALL Page

Use the Refresh SJT_CLASS_ALL page (SCRTY_OPR_RC) to refresh some or all of the data in the SJT_CLASS_ALL table to capture changes to permission lists that were not automatically loaded into the table.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh SJT_CLASS_ALL**, and then **Refresh SJT_CLASS_ALL**

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



Row Level Security Refresh

Field or Control	Description
Refresh All Rows?	Select to refresh every row in SJT_CLASS_ALL. Deselect to refresh selected rows. The system displays the Refresh Set field.
Refresh Set	Select the set of rows to refresh. The system displays the Set of Security to Refresh grid. You can select to refresh: • *All Trees.* • *Permission List* • *Security Type* • *Specific Tree*
Refresh Tree Effdts by (refresh tree effective dates by)	Select the date as of which you are refreshing the table. The process will refresh the table with the security data that is effective as of this date.

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Field or Control	Description
Set of Security to Refresh	Select the values to refresh. For example, if you've modified a row security permission list, rather than refreshing the entire table, select *Permission List* in the **Refresh Set** field and select the permission list you modified here. If you've modified a specific tree, select *Specific Tree* in the **Refresh Set** field and select the setID's to refresh for that tree.

Refresh SJT_OPR_CLS Page

Use the Refresh SJT_OPR_CLS (security operator class) page (SCRTY_OPRCLS_RC) to refresh some or all of the data in the SJT_OPR_CLS to capture the current relationship between user profiles and permission lists.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Refresh SJT_OPR_CLS**, and then **Refresh SJT_OPR_CLS**

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



The Refresh SJT_OPR_CLS process refreshes SJT_OPR_CLS as of the system date.

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Field or Control	Description
Refresh All Rows?	Select to refresh every row in SJT_OPR_CLS. Deselect to refresh selected rows. The system displays the Set of Security to Refresh field.
Set of Security to Refresh	Select the set of rows to refresh. You can select to refresh: • *Classid* Select to refresh the table with the selected row security or role-based permission lists IDs of users to whom they are attached. • *Orpid* Select to refresh the table with the selected user IDs and the permission lists assigned to them.

Querying Data Permission Security

To query data permission security, use the Security Data Inquiry component.

These topics discuss querying data permission security.

Pages Used to Query Data Permission Security

Page Name	Definition Name	Usage
Find Search View Page	SCRTY_CLASS_DISP	Query the actual view SQL text used in a specific component. Enter the name of the view you want to query in the View Name field. You can use the SQL Object ID to view the definitions of the SQL objects used in the view.
Display Security Data Page	SCRTY_TRANS_DISP	Display the security data for a selected security set and access type. You can view the user security data using the type and the transaction data secured by the type.
User Security Data Page	SCRTY_OPR_DISP	Query and review a user's security data, including assigned roles and permission lists.
Find in SJT_PERSON Page	SCRTY_SJT_PERSON	Review the transaction data used to secure a person's data and the permission lists and users who have access the person.
Find in SJT_PERSON_USF Page (See Find in SJT_PERSON Page)	SCRTY_SJT_PER_USF	(USF) Review the transaction data used to secure a person's data and the permission lists and users who have access the person.

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Page Name	Definition Name	Usage
Find in SJT_DEPT Page	SCRTY_SJT_DEPT	Review the transaction data used to secure a department's data and the permission lists and users who have access the department.
Find in HRS_SJT_JO Page	SCRTY_SJT_RSOPN	Review the transaction data used to secure a job opening and the permission lists and users who have access the job opening.

Understanding Data Permission Queries

The Security Data Inquiry component enables you to quickly and easily query aspects of your data permission setup in the event that you have questions or concerns about the implications of the access you've set up. The component consists of seven pages, each querying a different aspect of HCM data permission:

Page	Description
Find Search View	Use this page to review details about the security search view used by a component. There are a number of different search views and even the same component can use a different view, depending on which menu it is on. The security view text tells you which security set the data in the component falls into and if there is any special selection criteria. To use query search views you need to know the: • Component name. • Market. • Menu name. • Access mode the user was attempting: (either add or update). – If they were trying to add a record, you want to query the add search view (the system displays this in the Add Search field). – If they were trying to update or review a record, you want to query the search view displayed in the Search Record Name or Override Search Record field.

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Page	Description
Display Security Data	Use this page to review security data for the selected security set and security access type. You can further refine the query by selecting a user ID, permission list, or security key value, or a combination of the three. Review both the permission list access and the transaction data secured by the parameters. For example, you can review the data permission assigned to the permission list MyJobs for security set PPLJOB and security access type 001 (department 11000). Or you can review the transaction data available to permission list MyJobs for security set PPLJOB and security access type 002 (112 people with jobs). To compile a list of access for more than one access type, download the data in the grids to Microsoft Excel
User Security Data	Review a user's data permission profile, including his or her roles, role-based permission lists, and row security permission lists, and the data permission associated with them. The query only includes the roles and role-based permission lists that contain data permission security.
• Find in SJT_PERSON • Find in SJT_DEPT • Find in SJT_PERSON_USF • Find in HRS_SJT_JO	Use this page to review the access to transaction data. You can review: • The data securing transaction records. • Which permission list has data permission access to selected records. • Which users are assigned the selected permission lists.

Find Search View Page

Use the Find Search View page (SCRTY_CLASS_DISP) to query the actual view SQL text used in a specific component.

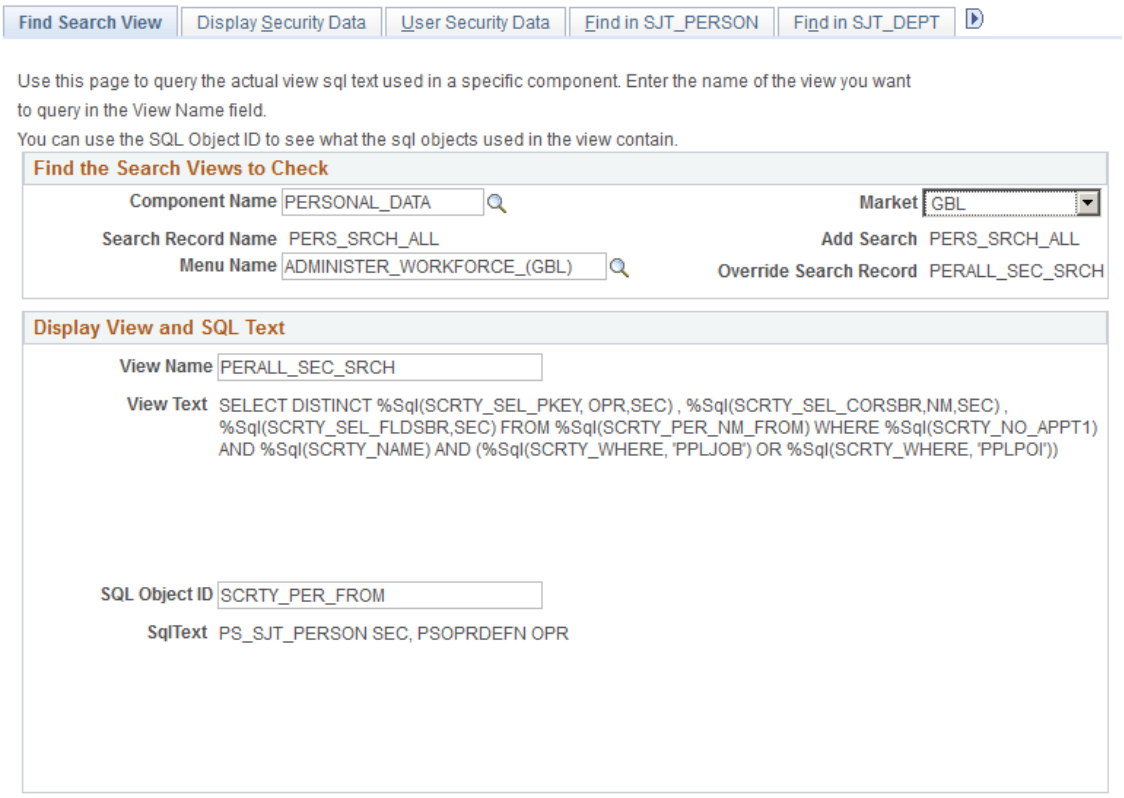
Enter the name of the view you want to query in the View Name field. You can use the SQL Object ID to view the definitions of the SQL objects used in the view.

Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Find Search View**

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

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To review the view and SQL text used in a security search view indicate which search view to search by entering the:

- Component name
- Market
- Menu name

Field or Control	Description
Search Record Name	Displays the component's default search record when you access the component in update or display mode. **Note:** You can assign an override search record to a component at the menu level. If the component uses an override search record, the search record displayed in the Override Search Record will be different from this one and you should search it instead.
Add Search	Displays the component's search record when you access the component in add mode.
Override Search Record	Displays the component's override search record when you access the component in update or display mode.
View Name and **View Text**	To review the text from a search record view, enter it into the **View Name** field. The system displays the view text when you tab out of the View Name field.

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Field or Control	Description
SQL Object ID and **SqlText**	To review the SQL text within an SQL Object used by the view, enter the SQL object ID into the **SQL Object ID** field. The system displays the SQL text when you tab out of the **SQL Object ID** field. **Note:** SQL objects are used to store common SQL.

For example, the security search view for the Personal Data component on the Administer Workforce menu, when accessed in Update mode, is PERALL_SEC_SRCH. This search view uses the security sets PPLJOB and PPLPOI and the transaction security join table SJT_PERSON. The view text has a special selection criteria to not return rows where the APPT_TYPE (appointment type) is equal to 1.

You can use this information to review the security data in greater detail. Perhaps to see what data is secured in security set PPLPOI or if the record a user is trying to access in this component has an appointment type value equaling 1 and that is why the record is unavailable.

See *PeopleTools: Application Designer Developer's Guide*.

Display Security Data Page

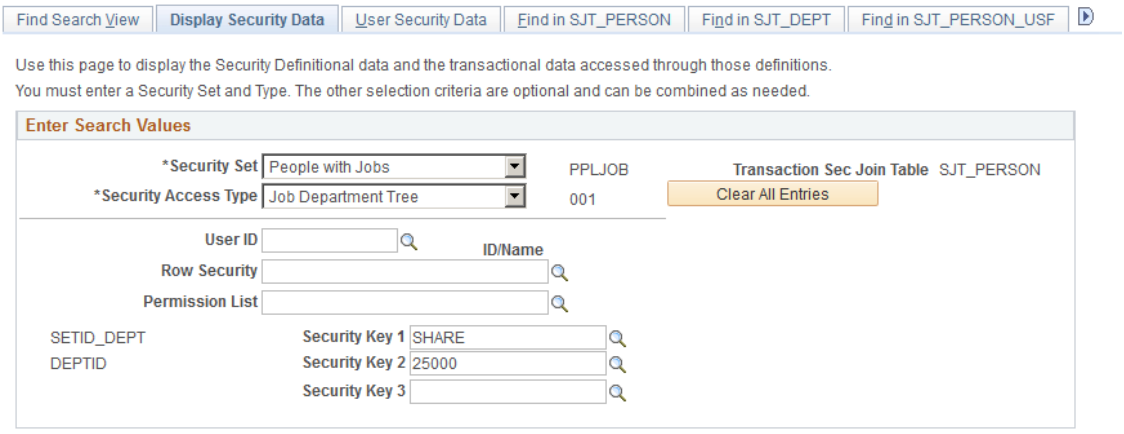
Use the Display Security Data page (SCRTY_TRANS_DISP) to display the security data for a selected security set and access type.

You can view the user security data using the type and the transaction data secured by the type.

Navigation:

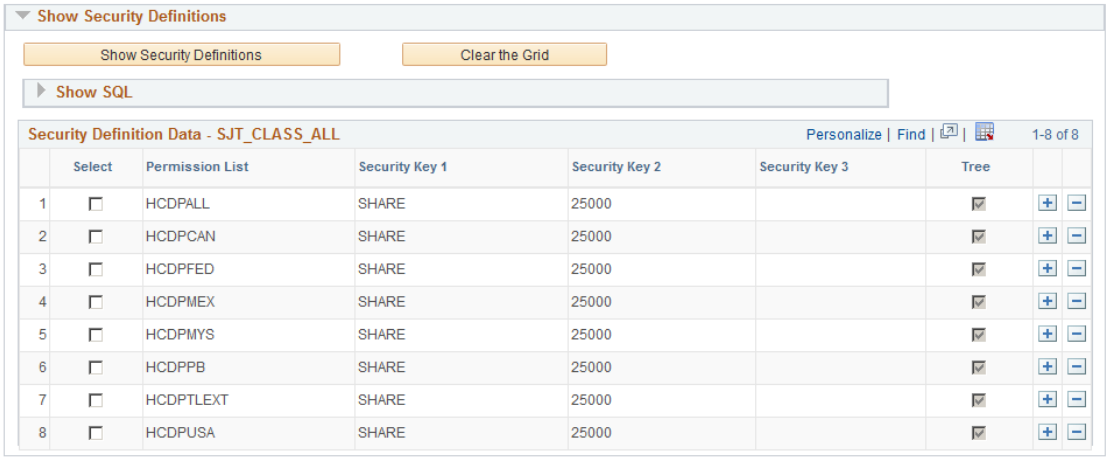
Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Display Security Data**

This example illustrates the fields and controls on the Display Security Data (1 of 3). You can find definitions for the fields and controls later on this page.

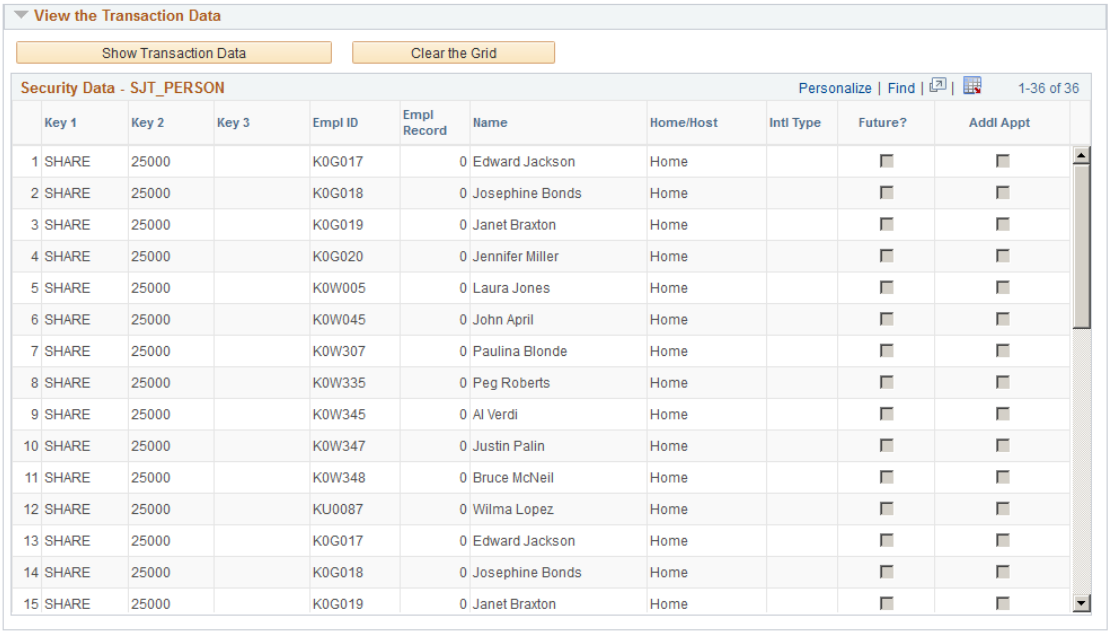


This example illustrates the fields and controls on the Display Security Data (2 of 3). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Display Security Data (3 of 3). You can find definitions for the fields and controls later on this page.



Click the **Clear All Entries** button to clear the search value fields.

Enter Search Values

Field or Control	Description
Security Set, **Transaction Sec Join Table**, and **Security Access Type**	Select the security set and security access type whose security data you want to review. The system displays the transaction security join table used by the security set.

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> **Note**
>
> If you want to review date permission security data for more than one security access type or for more than one of the additional parameters below, down the results in the Show Security Definitions and View the Transaction Data grids to Microsoft Excel and add to them as you perform your search.

To further refine the search within the selected security set or security access type, enter one or more values in these fields:

Field or Control	Description
User ID and **ID/Name**	To review a user's data permission security data, select the user ID. The system displays the ID and name of the person assigned to the selected profile.
Row Security	To review the data permission security data of a row security permission list, select the permission list. When you select a tree-based security access type and enter a user ID, the system enters the row security permission list associated with the user ID. This field is only available when you select a tree-based security access type.
Security Key 1, **Security Key 2**, and **Security Key 3**	To review the data permission security data for a selected security key, select the values (for example, to review the security data for department 10000, enter the department setID SHARE in Security Key 1 and the department id 10000 in Security Key 2).

Expand the Show SQL group boxes in the Show Security Definitions group box and the Viewing Transaction Data group box to review the SQL used to query SJT_CLASS_ALL table and transaction security join table for this query.

See Understanding Data Permission Security for HCM.

Show Security Definitions

Click the **Show Security Definitions** button to display the user security data that meets the search criteria.

The grid displays the permission list and the security key values that the permission list can access.

Field or Control	Description
Tree	The system selects this check box for row security (tree-based) permission lists.

View the Transaction Data

Click the **Show Transaction Data** button to display the transaction data stored in the transaction security join table of the selected security set. The rows in the grid vary depending on which security set you are querying.

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Field or Control	Description
Security Key 1 or **Key 1**, **Security Key 2** or **Key 2**, and **Security Key 3** or **Key 3**	Displays the transaction security data (and the necessary key values) used to secure this row of data.
SetID, **Department**, **Effective Date**, and **Description**	For rows of department transaction data, displays the set ID and the department whose data is secured.
Job Opening ID	For rows of recruiting solutions job openings, displays the ID of the job opening whose data is being secured.
Empl ID, **Empl Record**, and **Name**	For rows of person transaction data, displays the ID, employee record number (if applicable), and the name of the person whose data is secured. A person with more than one unique empl ID and employee record number combination will have more than one row of data.
Home/Host	This field is for global assignments and indicates if the transaction row is from the home or the host assignment job data record. Only job data records for the global assignment will display *Host*. See Security Installation Settings Page.
Intl Type (international type)	If you are using special security options for global assignment job data records, this field indicates if this row was created by the system to enable special job security. See Understanding Special Job Security Options.
Future?	This field indicates of the row comes from a future-dated transaction row. See Understanding Future-Dated Security.
Addl Appt (additional appointment)	(JPN) Indicates if this is an additional appointment transaction row. See Security Installation Settings Page.
WIP Status, **Retirement**, **NOA Code**, and **Stat Type**	(USF) displays additional information about the job data row. These values are not used to secure data.

User Security Data Page

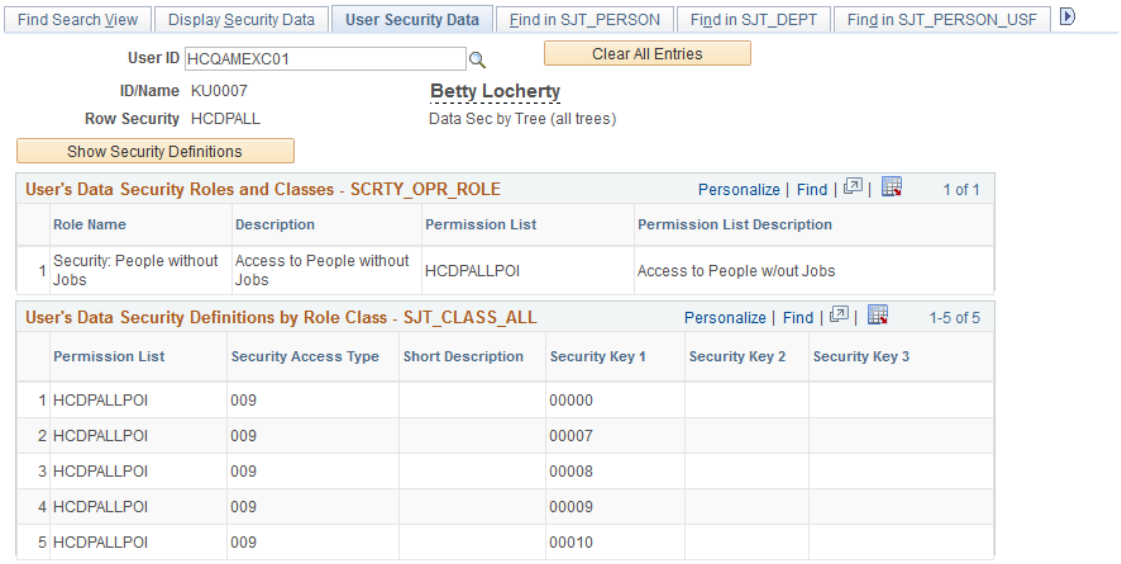
Use the User Security Data page (SCRTY_OPR_DISP) to query and review a user's security data, including assigned roles and permission lists.

Navigation:

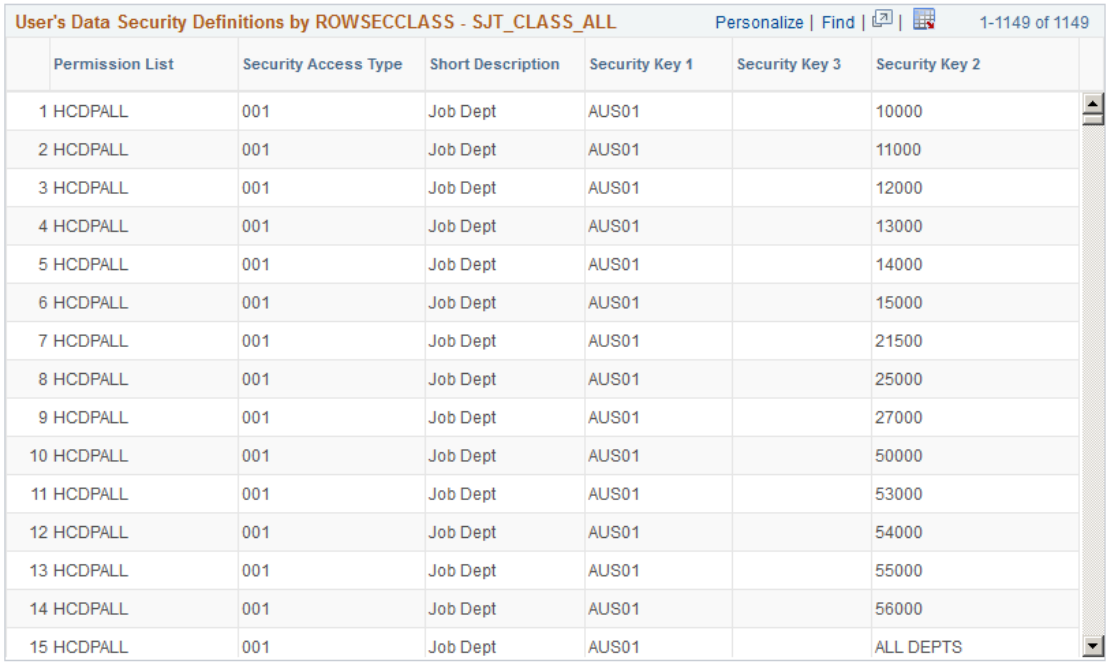
Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **User Security Data**

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

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



Field or Control	Description
User ID	Select the user ID of the person whose data permission access you want to query. The system displays the user's name and his or her row security permission list.

Click the Show Security Definitions button to populate the grids on the page.

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User's Data Security Roles and Classes – SCRTY_OPR_ROLE

Displays the roles assigned to the user and the permission lists with data permission assigned to those roles.

> **Note**
>
> The SCRTY_OPR_ROLE table only stores the roles that have permission lists with data permission. The grid does not list roles that do not have data permission.

User's Data Security Definitions by Role Class – SJT_CLASS_ALL

Displays the data permission of the role-based permission lists associated with this user's roles.

User's Data Security Definitions by ROWSECCLASS – SJT_CLASS_ALL

Displays the permissions of the row security permission list assigned to this user.

Related Topics

- Security Data
  Data permission is controlled on two sides: transaction and user.

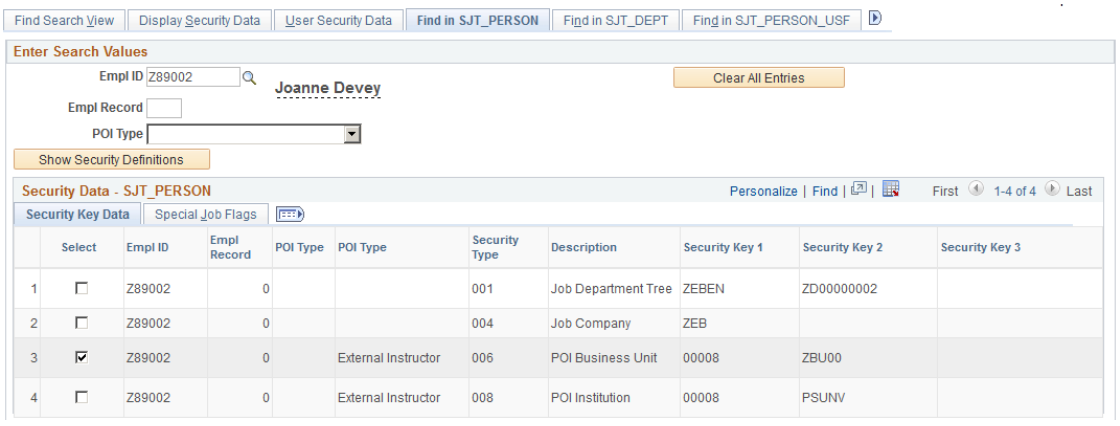
Find in SJT_PERSON Page

Use the Find in SJT_PERSON page (SCRTY_SJT_PERSON) or Find in SJT_PERSON_USF page (SCRTY_SJT_PER_USF) to review the transaction data used to secure a person's data and the permission lists and users who have access the person.

Navigation:

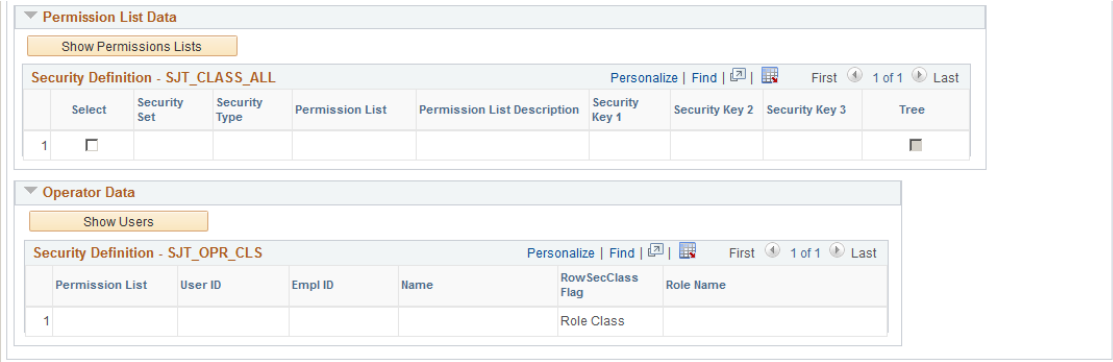
- **Set Up HCM**, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Find in SJT_PERSON**
- **Set Up HCM**, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Find in SJT_PRESON_USF**

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



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



> **Note**
>
> The Find in SJT_PERSON_USF page does not have the option to search for POIs.

Select the EmplID of the person whose transaction security data you want to review. To limit the search to a single job data record, enter the employee record number. To limit the search to a specific person of interest type, select the type.

Click the **Show Security Definitions** button to populate the Security Data - SJT_PERSON grid with the transaction security data securing this person's record or records.

Security Data – SJT_PERSON

Click the **Show Security Definitions** button to populate the Security Data - SJT_PERSON grid.

The system lists the rows in SJT_PERSON that match the search criteria you entered. Review the security keys on the **Security Key Data** tab. Access the **Special Job Flags** tab to review special security job option data, such as if a row is a future-dated row or if it was created to enable home/host access or additional assignment access.

To review which permission lists have data permission access to one or more of these rows, select the rows and click the Show Permission Lists button.

Permission List Data

Click the **Show Permission Lists** button to populate this grid

For each security set and security access type, the system lists the permission lists that can access the transaction rows you selected.

To review which users are assigned to one or more of these permission lists, select the rows and click the **Show Users** button.

Operator Data

Click the **Show Users** button to populate the grid.

The system displays each user assigned to the permission list or lists that you selected and indicates if the permission list is assigned to the user as a row security permission list or role-

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based (role-class) and, if the permission list is role-based, which role it is assigned to on the user's profile.

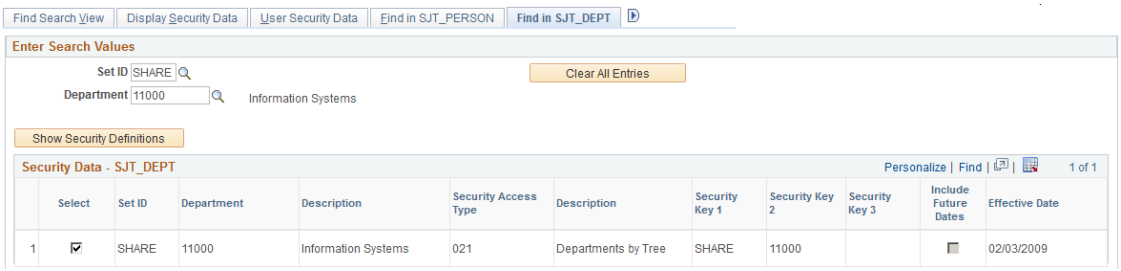
Find in SJT_DEPT Page

Use the Find in SJT_DEPT page (SCRTY_SJT_DEPT) to review the transaction data used to secure a department's data and the permission lists and users who have access the department.

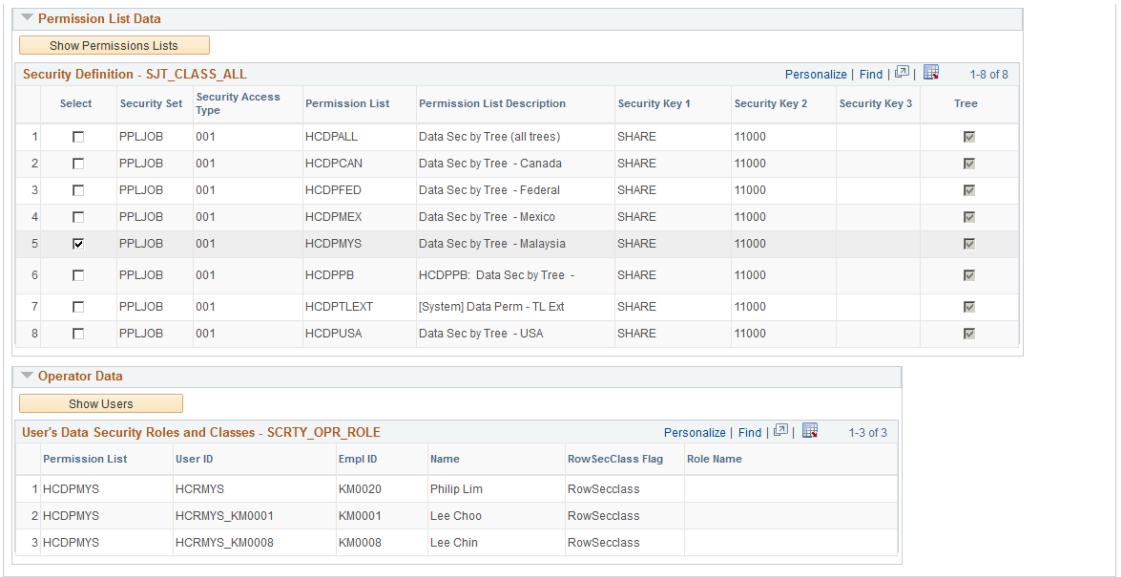
Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Find in SJT_DEPT**

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



Select the setID and department ID of the department whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - SJT_DEPT grid with the transaction security data securing this department's record or records.

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Find in HRS_SJT_JO Page

Use the Find in HRS_SJT_JO page (SCRTY_SJT_RSOPN) to review the transaction data used to secure a job opening and the permission lists and users who have access the job opening.

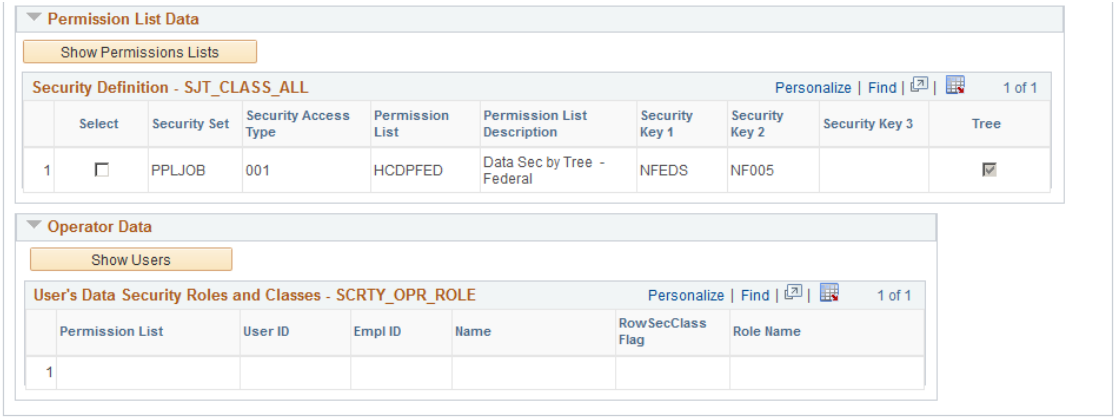
Navigation:

Set Up HCM, and then **Security**, and then **Core Row Level Security**, and then **Security Data Inquiry**, and then **Find in HRS_SJT_JO**

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



Select the ID of the job opening whose transaction security data you want to review.

Click the **Show Security Definitions** button to populate the Security Data - HRS_SJT_JO grid with the transaction security data securing this job opening's record or records.

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Creating Data Permission Security for Managers

To create data permission security for managers, use the Create Manager Users and Sec. component (RUN_PER510).

These topics provide an overview of data permission for managers and discuss how to create data permission for managers.

Pages Used to Process Row Security for Managers

Page Name	Definition Name	Usage
Create Manager Users and Sec. Page	RUNCTL_PER510	Create and update manager row security permission lists.

Understanding Data Permission for Managers

Use the Create Row Level Security for Dept Managers process to grant the appropriate data permission security access for department managers. The process will:

- Create a user profile if the manager is new and has no user profile.
- Create or update an existing row security permission list for each department manager, giving them access to the data in the departments that they manage.
- Delete the row security permission list for a user if it is obsolete (for example, the employee is no longer a manager).

The system uses the MgrID value from the Department Profile page (DEPARTMENT_TBL_GBL) to determine a department's manager. Managers will be given access to every department for which their ID is listed in the MgrID field.

Since you can list only one department manager per department, you will have to manually update the profiles of additional department managers. You can do this by assigning the row security permission list the system creates for the official manager to the unofficial manager's profile. Remember that the system will remove this list every time you run the Create Row Security for Mgr process.

> **Note**
>
> The Create Row Security for Mgr process uses the managers' EmplID as their user ID and uses the following naming convention for row security permission lists: HCDP_DEPT_MGR_[manager's EmplID]

Before You Begin

The Create Row Security for Mgr process uses tree-based security to create row security permission lists for managers. Before you run this process, you must have set up a department security tree.

The hierarchy rules of the department security tree apply to these permission lists. If a manager's department has departments reporting up to it on the security tree, the manager will have access to the people in those departments as well as his or her own.

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Refresh User Security Join Tables

The Create Row Security for Mgr process creates and modifies row security permission lists and assigns row security permission lists to, or deletes them from, user profiles. Both of these actions require that you:

- Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL with the row security permissions list data.
- Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS with the new user profile and row security permission list pairings from the User Profile - General page.

The system will not enforce the new data permission set up by the process until you run these refresh processes.

See Refresh SJT_CLASS_ALL Page.

See Refresh SJT_OPR_CLS Page.

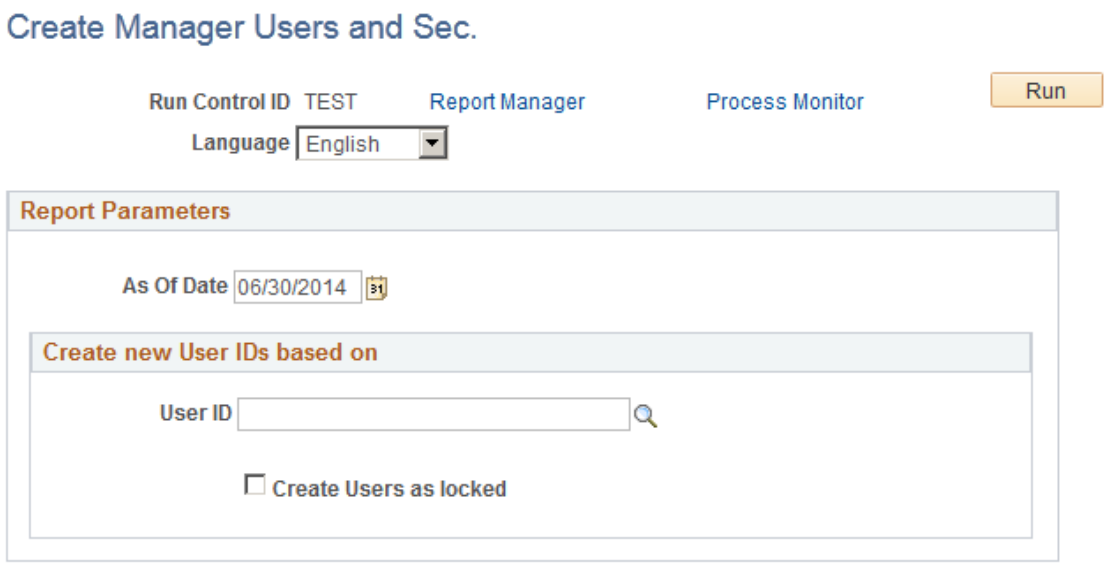
Create Manager Users and Sec. Page

Use the Create Manager Users and Sec. page (RUNCTL_PER510) to create and update manager row security permission lists.

Navigation:

Set Up HCM, and then **Security**, and then **User Maintenance**, and then **Create Manager Users and Sec.**, and then **Create Manager Users and Sec.**

This example illustrates the fields and controls on the Create Manager Users and Sec. page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
As Of Date	Select the date as of which the row security list permission list should become effective.

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Field or Control	Description
User ID	Select a default **User ID.** The system will base the new user IDs on this default.
Create User as locked	Select to lock all the new user IDs.

The Create Row Security for Mgr process consists of two PeopleSoft Application Engine processes and one SQR report:

1. HR_PER510.

   Determines the changes required in order to maintain data-permission for department managers.

2. HR_PER510_CI

   Applies to the database the changes determined by HR_PER510.

3. SQR report PER510

   Lists the changes determined by HR_PER510 and applied by HR_PER510_CI and their status.

> **Note**
>
> You must select each process individually and wait for it to complete successfully before selecting and running the next process.

Creating and Locking User IDs

To create and lock user IDs, use the Create Users (CREATE_USERS) and Lock Users (LOCK_USERS) components.

These topics provide an overview of security for user IDs and discuss how to create and lock users.

Pages Used to Create and Lock User IDs

Page Name	Definition Name	Usage
Create Users Page	CREATE_USERS	Create user IDs for a group of individuals.
Lock Users Page	LOCK_USERS	Lock or unlock groups of user IDs.

Understanding Security for User IDs

Create user IDs for your workforce using Group Build and the Create Users page. Create and populate a group using Group Build and then use the Create Users page to create user IDs for each group member.

Use the Lock Users page to lock user IDs (employee IDs) until you are ready to use them.

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Related Topics

- Understanding Group Build
  These topics discuss how to:

Common Elements Used When Creating and Locking User IDs

Field or Control	Description
Group ID	Select the ID of the group whose members require user IDs.
Populate Group	Click to populate the page with the group members.
EmplID and **Name**	Displays the Empl IDs and names of the individuals in the selected group.
User ID	Displays the user IDs of the individuals once you've clicked the **Create User IDs** button. The system uses the Empl ID as the User ID.
Account Locked Out?	The system selects this option if the user ID account is locked out.

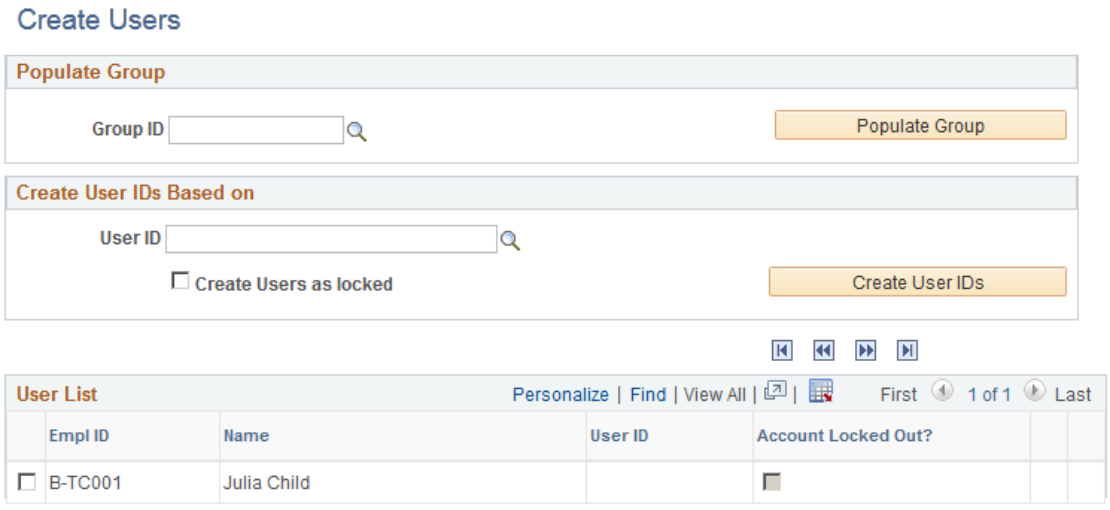
Create Users Page

Use the Create Users page (CREATE_USERS) to create user IDs for a group of individuals.

Navigation:

Set Up HCM, and then **Security**, and then **User Maintenance**, and then **Create Users**, and then **Create Users**

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



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> **Note**
>
> The user ID created by this process will be the same as the employee ID for which it was created.

Field or Control	Description
Group ID	Enter or select the group ID that you want to use to create user IDs for a group of individuals.
User ID	Select a default **User ID.** The system will base the new user IDs on this default. Once created, you can modify individual profiles on the User ID pages. If the user ID upon which you are basing the new users has data permission, you will need to run the Refresh SJT_OPR_CLS process. Otherwise the system will not recognize the data permission on the new user profiles. See Refresh SJT_OPR_CLS Page.
Create User as locked	Select to lock all the new user IDs.
Create User IDs	Select to run the process.

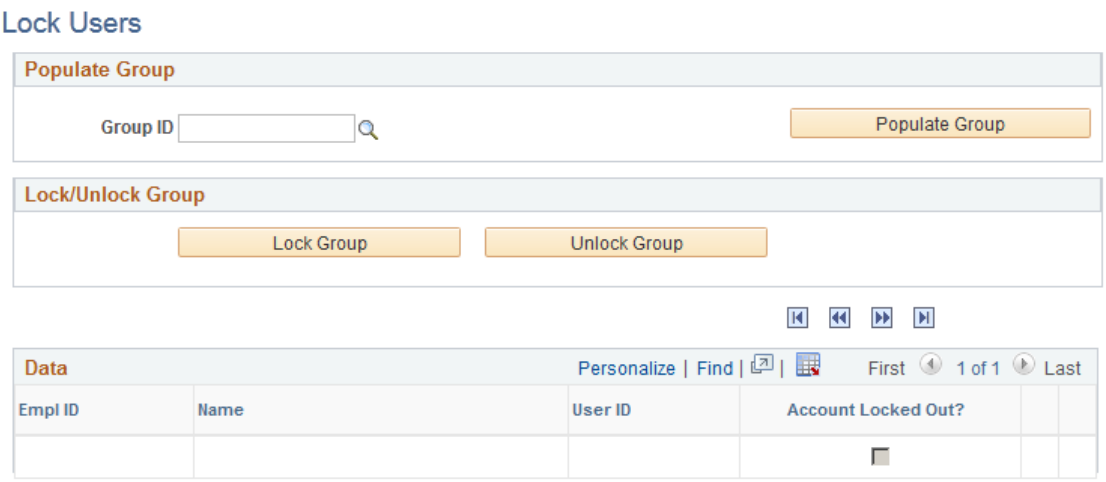
Lock Users Page

Use the Lock Users page (LOCK_USERS) to lock or unlock groups of user IDs.

Navigation:

Set Up HCM, and then **Security**, and then **User Maintenance**, and then **Lock Users**, and then **Lock Users**

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



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> **Note**
>
> You can only lock users created through the Create Users page. The employee ID and user ID are the same value.

Field or Control	Description
Lock Group	Click to run the process and lock the user IDs (employee IDs) of the entire group.
Unlock Group	Click to run the process and unlock the user IDs (employee IDs) of the entire group.

Setting Up Security for Local Functionality

These topics provide an overview of security for local functionality and discuss setting up security for local functionality.

Pages Used to Grant Access to Local Country Functionality

Page Name	Definition Name	Usage
Setup Global Security Page	SCRTY_TBL_GBL	Select which country functionality a primary permission list can access on global components.
Excluded Panelgroups Page	SCRTY_GBL_SEC	Restrict access to local functionality on selected components.

Understanding Security for Local Functionality

Local functionality refers to functionality that is specific to a country. Country-specific functionality is in collapsible sections marked by the country's flag, in the global components. To grant access to local components, you use component permission. To grant access to the local functionality on global components, you use the Setup Global Security page in addition to component permission.

To grant users access to local country functionality on the global menus:

1. Use the Country Specific - Installed HR Countries page (INSTALLATION_SEC) to select the local country functionality that is installed as part of your PeopleSoft HCM system.

   If you do not specify a country here, its local functionality can't be accessed.
2. Grant the primary permission lists access to country-specific functionality using the Setup Global Security page.
3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See *PeopleTools: Security Administration*

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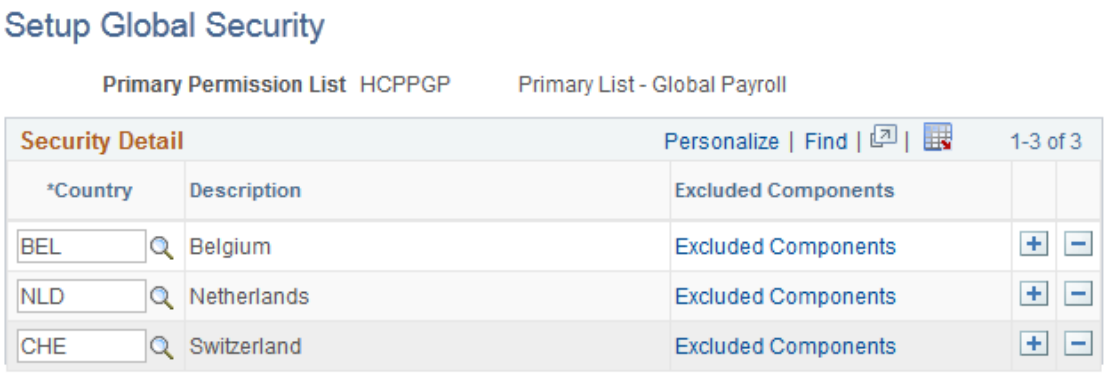
Setup Global Security Page

Use the Setup Global Security page (SCRTY_TBL_GBL) to select which country functionality a primary permission list can access on global components.

Navigation:

Set Up HCM, and then **Security**, and then **Component and Page Security**, and then **Setup Global Security**, and then **Setup Global Security**

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



Field or Control	Description
Primary Permission List	Users assigned to this permission list can access the country-specific sections on global components of the countries that you indicate on this page. Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

Field or Control	Description
Country	Select the country or countries whose local functionality users assigned to the primary permission list can access in global components.
Excluded Components	When you click Excluded Components, the system displays the Restricting Access to Local Country Functionality page. Using this page, you can restrict access to country-specific functionality in select components. For example, you can grant a permission list access to Italian sections on all global components except for Personal Data.

See Setting Up Primary Permission List Preferences.

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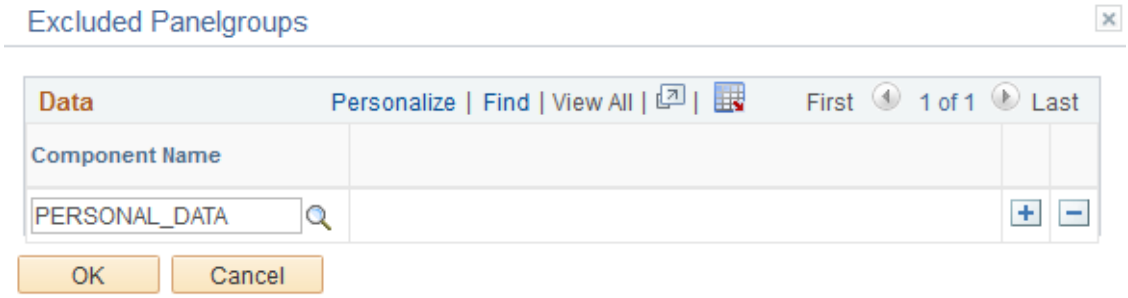
Excluded Panelgroups Page

Use the Excluded Panelgroups page (SCRTY_GBL_SEC) to restrict access to local functionality on selected components.

Navigation:

Click the **Excluded Components** link on the Setup Global Security page.

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



Field or Control	Description
Component Name	Select the name of the component for which global functionality for this country is being restricted. For example, to restrict access to Italian-specific functionality in the Personal Data component, select the Personal Data component.

Modifying Data Permission Security

These topics discuss how to:

- Modify security for hiring and transferring people.
- Allow people to update their own data.

Modifying Security for Hiring and Transferring Workers

PeopleSoft HCM enables users to assign workers into departments that they can't access for updates. To prevent a user without access from transferring a worker into a department, PeopleSoft HCM contains a view, DEPT_SEC_VW, that shows only the department IDs that the user is authorized to access.

If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_SEC_VW. You may also want to change the security view on the DEPARTMENT_TBL component to this view if you want users to only be able to access departments they have access to. This is defined using the Department security sets.

See *PeopleTools: Application Designer Developer's Guide*.

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Allowing Workers to Update Their Own Data

PeopleSoft HCM doesn't allow users to update their own data except in the self-service internet applications. However, sometimes you might want them to update some of their own data in other components. To allow users to update their own data, you implement the PeopleCode function Allow EmplIDChg (allow emplID change). The function looks for a single Boolean parameter. When the parameter is set to true, workers can update their own data; when it is set to false, they cannot.

For example, to allow workers to change their own personal data, you enable the PeopleCode function for PERSONAL_DATA, the underlying record definition for the Personal Data component. Then workers can change their personal data, but not their job information.

To enable the Allow EmplIDChg function:

1. Open the record PERSON in PeopleSoft Application Designer.
2. Open the RowInit PeopleCode on the **EMPLID** field.
3. Insert new code after this line:

```
/************ START OF ROW INIT PEOPLECODE *************/
```

4. Insert a row and enter the following code after the first line (a comment) of existing code:

```
if %Component = Component.PERSONAL_DATA then

    AllowEmplidChg(true);

end-if;
```

5. Save your changes and exit the PeopleCode page.

Workers can now update their own data using the Personal Data page.

To allow workers to update their own data in other places in PeopleSoft HCM, enter this PeopleCode function in the underlying record definition for each page where you want to allow updates.

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6

Setting Up Encryption Framework

Understanding the Encryption Framework

The Encryption Framework provides pages for identifying sensitive information in applications and an application engine (AE) process that encrypts and masks sensitive data that is stored in the database.

This table shows a change in data values stored in the database after the encryption process is run. In this example, the encryption process encrypts the value of the ACCOUNT_NUM field in the DIR_DEP_DISTRIB source record for Payroll for North America.

After the encryption process is run successfully, the ACCOUNT_NUM field stores the masked account number, and the PY_BANKACCCRYPT field (which was added to the record to store the encrypted value) stores the encrypted account number.

Encryption Run	Field	Value
Before	ACCOUNT_NUM (existing field)	1234567890
	PY_BANKACCCRYPT (new field)	[blank]
After	ACCOUNT_NUM (existing field)	XXXXXX7890
	PY_BANKACCCRYPT (new field)	9WwdDcA3l/uYpYKM+uSmsw==

> **Note**
>
> After encryption is run, the encrypted bank account numbers stored in the database can't be viewed on any delivered online page. The masking of account numbers on online pages is controlled by the Direct Deposit options on the Payroll for NA Installation page. Refer to the Direct Deposit Installation Options and Data Masking topic for more information.

To comply with Nacha's data security requirements, which request that deposit account information be rendered unreadable when it is stored electronically, Global Payroll for United States, Payroll for North America, and Payroll Interface leverage the Encryption Framework to encrypt and mask bank account numbers in the database.

> **Note**
>
> When encryption is run on a source record, all future additions, updates, changes will be automatically encrypted. For instance, when an employee adds new direct deposit data after the encryption process is run, the account number stored in the database will automatically be encrypted and masked. You only need to run the encryption once per source record.

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Encryption Framework Setup

The framework provides robust setup options to meet your data encryption requirements. Use the setup component to:

- Define source records, which are the “source of truth” records that store and maintain the sensitive data in the database.

  After the encryption process is run, the source record stores the sensitive data masked, and its encrypted value in the new field added in the source record to store encrypted data.
- Determine whether the encryption applies to all or country-specific set of data in a source record.
- Grant role-based access to administrative users who need to view the unmasked data, if applicable.
- Define process records to map with application batch processes that require data to be unmasked in outputs, if applicable.

  See Also Batch Process Mapping and Process Records.
- Clean up staging tables that may contain unmasked or decrypted data.

See Also Setting Up the Encryption Framework.

Encryption and Masking Process

The Encryption Framework delivers the Manage Encryption and Masking (HCCRYPTAE) AE process to encrypt and mask data in the HCM system. The run control page provides options to:

- Encrypt or decrypt data in source records based on the current encryption status.
- Mask or unmask data in process records, if available, that are defined for source records.

See Also Manage Encryption and Masking Page.

Batch Process Mapping and Process Records

Some batch processes are required to display the actual values of the sensitive data in their outputs (report files or pages). For example, the account numbers that appear in direct deposit transmit files created by the DDP001 process in Payroll for North America need to be unmasked.

The Encryption Framework supports the unmasking of data to be used in the outputs of batch processes in applications. Setup includes:

- Defining the process record. This step defines an association between a source record (which stores the encrypted data) and the process record (which stores the masked data by deriving it from its source record).
- Maps the application batch process that is required to display unmasked data in its outputs to a source record (from which the encrypted data is retrieved), and a source staging record (from where the data unmasking occurs).

During the application batch process run, the framework copies the required data from the source record over to the source staging record for decryption. The framework process also copies the required data from the process record over to the process staging record. After that, the framework process unmasks the data in the process staging record using the decrypted

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data in the source staging record. The application batch process can then retrieve the actual values of the sensitive data for use in its outputs.

See Also Define Process Records Page and Map Batch Processes Page.

Understanding Data Encryption for Global Payroll for United States

This topic provides additional information about the implementation of the bank account number encryption that is specific to Global Payroll for United States.

The content is grouped into these sections:

- Encryption Source Records
- Delivered Roles For Viewing Unmasked Data
- Banking Options and Data Masking

Video: Image Highlights, PeopleSoft HCM Update Image 39: HCM Encryption Configuration

Encryption Source Records

To comply with Nacha's data security requirements, Global Payroll for United States uses the Encryption Framework to encrypt and mask bank account numbers stored in the database for payee bank accounts, deduction recipients and source bank accounts.

The pages used in Global Payroll for United States that display bank account numbers include:

- (SRC_BANK source record) Source Bank Accounts Page.
- (RECIPIENT source record) PeopleSoft Global Payroll: Define Deduction Recipients Page.
- (GP_RCP_PYE_DTL source record) PeopleSoft Global Payroll: Add Deduction Recipients Page.

  You cannot view or edit the bank account number on this page, but when you select a recipient ID, the information for this recipient is copied from the RECIPIENT table to the GP_RCP_PYE_DTL table.
- (PYE_BANKACCT source record)
  - PeopleSoft Human Resources Administer Workforce: Maintain Bank Accounts Page.
  - Personal Bank Accounts pages from Employee Self-Service. See PeopleSoft ePay: Updating Personal Bank Account Information.
  - PeopleSoft ePay: Bank Accounts Page from the Banking file in Fluid.

Refer to Encryption Source Records for a list of source records that are delivered for bank account number encryption using the HCM Encryption Framework.

After the encryption process is run for the selected source records, the account numbers are encrypted and masked in the database. The account numbers displayed on the corresponding pages are also masked based on configuration, unless the users are granted the roles that allow them to view the unmasked data. See the Delivered Roles For Viewing Unmasked Data topic for system-delivered roles that grant access to see unmasked data.

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Delivered Roles For Viewing Unmasked Data

Global Payroll for United States delivers user roles that allow the administrator(s) to view unmasked account numbers for deduction recipients, payee bank accounts, and the Source Bank Accounts table, even though the numbers are masked for everyone else. These roles are:

- Payee Bank Account Admin

  This role allows users to see the unmasked account numbers on the PeopleSoft Human Resources Administer Workforce: Maintain Bank Accounts Page. Employees who are also administrators with this role can view their own unmasked bank account numbers using Personal Bank Accounts pages from Employee Self-Service and the Bank Accounts page from the Banking tile in Fluid.

- Recipient Bank Account Admin

  This role allows users to see the unmasked account numbers on the PeopleSoft Global Payroll: Define Deduction Recipients Page.

- Source Bank Account Admin

  This role allows users to see the unmasked account numbers on the Source Bank Accounts Page.

Banking Options and Data Masking

The **Enable Mask** option determines the masking of bank account numbers on the Maintain Bank Accounts page for administrators, as well as Personal Bank Accounts (Classic) and Bank Accounts (Fluid) self-service pages for employees.

This example illustrates the fields and controls on the Security section of the Self Service Banking Options page.



Regardless of this setting, payee account numbers are still masked in the database once the encryption is run.

All account numbers on the wage statements (HTML online pages and PDFs) are also masked when the encryption is run.

Related Topics

- Understanding the Encryption Framework
  The Encryption Framework provides pages for identifying sensitive information in applications and an application engine (AE) process that encrypts and masks sensitive data that is stored in the database.
- Setting Up the Encryption Framework
  This topic discusses how to set up the Encryption Framework.

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Understanding Data Encryption for Payroll for North America

This topic provides additional information about the implementation of the bank account number encryption that is specific to Payroll for North America.

The content is grouped into these sections:

- Encryption Source Records
- Things to Consider Before Running Encryption
- Delivered Roles For Viewing Unmasked Data
- Direct Deposit Installation Options and Data Masking
- Audit Records
- Direct Deposit Advices and Paychecks
- Direct Deposit Reports
- Electronic Files
- Vendor Listing Report
- Vendor Sync
- Check Reconciliation Reports
- Check Reconciliation Bank Account Cross Reference Encryption Status
- (USF) Treasury Interface Extract Process
- Decrypting Account Numbers

Video: Image Highlights, PeopleSoft HCM Update Image 39: HCM Encryption Configuration

Video: Image Highlights, PeopleSoft HCM Update Image 40: HCM Encryption Product Uptakes

Encryption Source Records

To comply with Nacha's data security requirements, Payroll for North America uses the HCM Encryption Framework to encrypt and mask bank account numbers stored in the database.

This table lists the source records delivered for bank account number encryption, the products or functional areas in which they are used, and the pages on which bank account numbers are masked when encryption is run on them.

Use this table as a tool to decide which source records need to be encrypted for your products. For example, if you want to encrypt bank account numbers in your Federal Payroll system, set the action to encrypt all the source records that are listed for *Federal Payroll* in this table when you run the encryption process (HCCRYPTAE).

Source Record	Used In	Pages
DIR_DEP_DISTRIB	• Federal Payroll • Payroll for North America • Payroll Interface	• PeopleSoft Payroll for North America: Request Direct Deposit Page (administrator page). • PeopleSoft ePay: Direct Deposit Page (employee self-service page).

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Source Record	Used In	Pages
GARN_SPEC	Payroll for North America	PeopleSoft Payroll for North America: Deduction Distribution Information Page from the Garnishment Spec Data 6 page (U.S. version).
GENL_DEDUCTION	Federal Payroll	• PeopleSoft Payroll for North America: Employee Deduction Distribution Page from the Create General Deductions page • Distribution Information page in the Voluntary Deductions page (employee self-service page).
GP_RCP_PYE_DTL	Global Payroll for United States	PeopleSoft Global Payroll: Add Deduction Recipients Page. See Also Understanding Data Encryption for Global Payroll for United States.
GVT_DED_DIST	Federal Payroll	Deduction Distribution Information page from the PeopleSoft Payroll for North America: General Deduction Distribution Page.
GVT_GARN_PAYEE	Federal Payroll	(USF) GVT Employee Distribution Page from the Garnishment Payee Table page.
GVT_GARN_SPEC	Federal Payroll	PeopleSoft Payroll for North America: Deduction Distribution Information Page from the Garnishment Spec2 page.
GVT_PAM_SAL_DTL	Federal Payroll	Not applicable (Source record is used in PAM/SPS reporting)
GVT_PAM_VEN_SUM	Federal Payroll	Not applicable (Source record is used in PAM/SPS reporting)
GVT_TAX_ROUTING	Federal Payroll	• State Tax Routing 1 page. • Locality Tax Routing 1 page. See PeopleSoft Payroll for North America: (USF) Setting Up State and Locality Tax Routing.

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Source Record	Used In	Pages
PYE_BANKACCT	Global Payroll for United States	• PeopleSoft Human Resources Administer Workforce: Maintain Bank Accounts Page. • Personal Bank Accounts pages (employee self-service pages). See PeopleSoft ePay: Updating Personal Bank Account Information. • PeopleSoft ePay: Bank Accounts Page from the Banking file in Fluid. See Also Understanding Data Encryption for Global Payroll for United States.
PY_BNKACCT_XREF	• Federal Payroll • Payroll for North America	Not applicable (Source record used in the check reconciliation process)
RECIPIENT	Global Payroll for United States	PeopleSoft Global Payroll: Define Deduction Recipients Page. See Also Understanding Data Encryption for Global Payroll for United States.
SRC_BANK	• Federal Payroll • Global Payroll for United States • Payroll for North America	• Source Bank Accounts Page. • (CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages.
VNDR_BANK_ACCT	• Benefits • Federal Payroll • Payroll for North America	Bank Accounts Page from the Vendor Information - Locations page.

After the encryption process is run for the selected source records, the account numbers are encrypted and masked in the database. The account numbers displayed on the corresponding pages are also masked, unless the users are granted the roles that allow them to view the unmasked data. See the Delivered Roles For Viewing Unmasked Data topic for system-delivered roles that grant access to unmasked data. For the Request Direct Deposit page (for administrator) and the Direct Deposit page (for employee), the masking of the account numbers is controlled by the installation options rather than the encryption process. See the Direct Deposit Installation Options and Data Masking topic for more information.

Things to Consider Before Running Encryption

The encryption (or decryption) process for the bank account numbers should only be run when users are not allowed to access or update the bank account numbers in the database.

In most cases, the encryption process needs to be run only once unless there is compelling reason to do so again later (for example, changing to a new encryption profile). While it is not practical to prevent users from accessing the system during the encryption run, there are certain pages, processes, and programs from which users *must be* locked out in order to prevent inconsistent or unpredictable outcomes. They are:

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Pages:

- Employee Self-Service Direct Deposit page.
- Administer Request Direct Deposit page.
- Deduction Distribution Information page from the Garnishment Spec Data 6 page (U.S.).
- Source Banks Account page.
- (USF) Employee Deduction Distribution page from the Create General Deductions page.
- (USF) Distribution Information page from the Voluntary Deductions page (employee self-service page).
- (USF) Deduction Distribution information page from the General Deduction Distribution page.
- (USF) GVT Employee Distribution page from the Garnishment Payee Table page.
- (USF) Deduction Distribution Information page from the Garnishment Spec2 page.
- (USF) State Tax Routing 1 page.
- (USF) Locality Tax Routing 1 page.

Batch processes: The Confirm process.

Programs that access account details: DDP001, DDP001CN, DDP002, DDP003, DDP003CN, DDP004, DDP005, DDP006, FGPY040, FGPY041, PAY003, PAY003CN, PAY040, PY_DIRDEP, and TAX870EU.

Delivered Roles For Viewing Unmasked Data

Payroll for North America delivers two roles that allow the administrator(s) to view unmasked account numbers for direct deposit, EFT child support garnishment payments, the Source Bank Accounts table, and vendors, even though the numbers are masked for everyone else. These roles are:

- *Bank Account Admin*

  This role allows users to see the unmasked account numbers on all administrator pages that store bank account numbers. Some examples include, but not limited to, the PeopleSoft Payroll for North America: Request Direct Deposit Page, the PeopleSoft Payroll for North America: Deduction Distribution Information Page from the Garnishment Spec Data 6 page, and the Bank Accounts Page for vendors.

  This role also allows users to see the unmasked account numbers on the Source Bank Accounts Page and (CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages.

- *Source Bank Account Admin*

  This role allows users to see the unmasked account numbers on the Source Bank Accounts Page and (CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages.

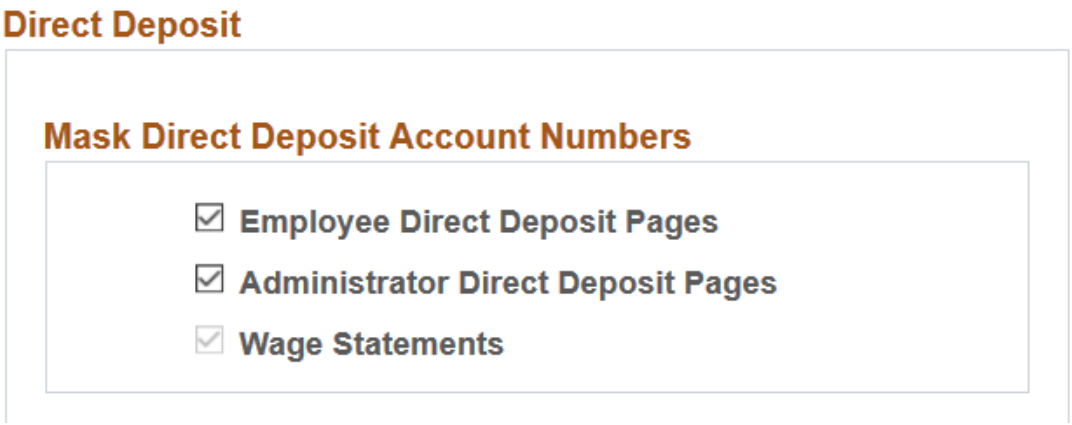
See Also Grant Unmasked Access Page.

Direct Deposit Installation Options and Data Masking

The installation options for direct deposit determine the masking of bank account numbers on direct deposit pages.

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This example illustrates the Direct Deposit section of the Payroll for NA Installation page.



Wage Statements

When the **Enable Encryption** option is enabled on the HCM Options Page of the Installation Table, the **Wage Statements** option becomes selected and not editable by default. All account numbers on the wage statements, for both HTML (online pages) and PDFs will display as masked after the encryption is run.

Employee and Administrator Direct Deposit Pages

The masking of account numbers on the employee and administrator direct deposit pages is controlled by the **Employee Direct Deposit Pages** and **Administrator Direct Deposit Pages** options on the HCM Options page.

After encryption is run for the DIR_DEP_DISTRIB record, all account numbers will display as masked on the PeopleSoft ePay: Direct Deposit Page and PeopleSoft Payroll for North America: Request Direct Deposit Page if the options are selected. An exception to this is when the user is assigned the *Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the DIR_DEP_DISTRIB record. With this role, the user can view unmasked account numbers on the Request Direct Deposit page.

If these installation options are deselected, the account numbers on the same pages will not be masked.

> **Note**
>
> When DIR_DEP_DISTRIB is encrypted, the account numbers *in the database* are still masked even if the installation options for the direct deposit pages are deselected when DIR_DEP_DISTRIB is encrypted.

Audit Records

Each time an employee enters direct deposit data in Employee Self Service, audit records are added to the Direct Deposit Audit Record (PY_IC_DD_AUDIT).

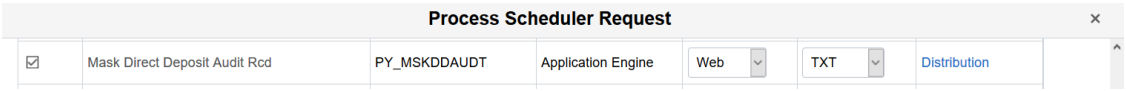
(USF) In addition, audit records are added to the General Deduction Audit Record (PY_IC_DED_AUDIT) when federal employees enter general deduction data in Employee Self Service.

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The account numbers in the audit records can be masked by running the Mask Direct Deposit Audit Rcd (PY_MSKDDAUDT) process after DIR_DEP_DISTRIB and GENL_DEDUCTION are encrypted. By running the process, all account numbers in both records will be masked.

To access the Process Request Dialog run control page, navigate to: **PeopleTools**, and then **Process Scheduler**, and then **Schedule Process Requests**, and then **Process Request Dialog**. Click **Run**. Then, select the *Mask Direct Deposit Audit Rcd* row in the Process List section, and click **OK**.

This example displays the Mask Direct Deposit Audit Rcd process on the Process Schedule Request page, which is used to mask direct deposit account numbers in the audit record.



The Mask Direct Deposit Audit only needs to be run once. Subsequent updates for employee direct deposit transactions entered through Employee Self Service and general deduction transactions entered through Employee Self Service Voluntary Deduction will automatically be masked since the DIR_DEP_DISTRIB and GENL_DEDUCTION records have already been encrypted.

Important

Once the direct deposit account numbers have been masked in the PY_IC_DD_AUDIT and PY_IC_DED_AUDIT records, the direct deposit account numbers in the audit records cannot be unmasked.

Direct Deposit Advices and Paychecks

Masked account numbers are displayed on advices and paychecks with partial direct deposit account number details when DIR_DEP_DISTRIB is encrypted.

- Direct Deposit Register (DDP002)
- Advice Print – US (DDP003)
- Advice Print – Canada (DDP003CN)
- Pay Check Print – US (PAY003)
- Pay Check Print – Canada (PAY003CN)

Direct Deposit Reports

Masked account numbers are displayed on these reports when DIR_DEP_DISTRIB is encrypted:

- Payroll Advice Register (DDP004)
- Direct Deposit Prenotification report (DDP005)
- Direct Deposit Prenote Memo (DDP006)

Unmasked account numbers are displayed on the reports when DIR_DEP_DISTRIB is not encrypted.

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Electronic Files

Account numbers are always unmasked on these files, even when corresponding records are encrypted:

- Direct Deposit files (DDP001 & DDP001CN)
- Child Support – EFT file (PAY040)
- Qtrly Wage - Eugene report (TAX870EU)
- Treasury Interface Bulk File (FGPY041)

Vendor Listing Report

The bank account numbers that appear on the Vendor Listing report are masked when encryption is run on the VNDR_BANK_ACCT source record.

See Also PeopleSoft Payroll for North America: Maintaining Vendor Information

Vendor Sync

When using VENDOR_SYNC, the bank account numbers will not be masked in the inbound or outbound messages, even if encryption is run on the VNDR_BANK_ACCT source record.

Check Reconciliation Reports

The bank account numbers that appear on these Check Reconciliation reports, Error Listing (PAY015A) and Checks Reconciled From Unprocessed Manual (PAY015B), are masked when encryption is run on the SRC_BANK and PY_BNKACCT_XREF source records.

See PeopleSoft Payroll for North America: Check Reconciliation Page.

Check Reconciliation Bank Account Cross Reference Encryption Status

The system includes a data conversion process (AE program DC33195853) that automatically sets the encryption status for the PY_BNKACCT_XREF source record to *None* or *Encrypted*, depending on whether data exists in the PAY_CHECK_DUE table or not.

Scenario 1: No Data in PAY_CHECK_DUE

If there isn't any data in the PAY_CHECK_DUE table at the time the Data Conversion process is run, the process will always set the encryption status of the PY_BNKACCT_XREF source record to *None* on the Define Source Records Page.

Then during the first run of the Check Reconciliation process (PAY015A.SQR), it adds data in the PY_BNKACCT_XREF source record and updates the encryption status with the same value as the SRC_BANK source record.

If the encryption status of the PY_BNKACCT_XREF source record is not what you expected after the first run of the Check Reconciliation process, you can navigate to the Manage Encryption and Masking Page, select *Encrypt* (or *Decrypt*) in the **Action** field for the PY_BNKACCT_XREF source record to run the encryption process.

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Scenario 2: Data Exists in PAY_CHECK_DUE

If data exists in the PAY_CHECK_DUE table at the time the Data Conversion process is run, the process creates a new PY_PAYCHECK_DUE table and generates data in the PY_BNKACCT_XREF source record. The process will automatically default the encryption status for PY_BNKACCT_XFER based on status of SRC_BANK. For example, if SRC_BANK displays *Encrypted*, PY_BNKACCT_XFER will also display *Encrypted*.

If the PY_BNKACCT_XFER source record is decrypted (or encrypted again) in the future, the status is set based on the action defined for its row on the Manage Encryption and Masking Page.

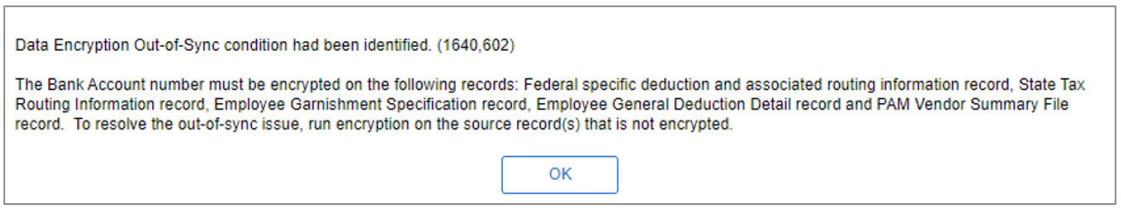
(USF) Treasury Interface Extract Process

The system includes two error messages to ensure that the required source records are encrypted when running the Treasury Interface Extract process (FGPY040.SQR).

This example illustrates the error message that appears online when the PeopleSoft Payroll for North America: Treasury Interface Extract Page is saved in any of these scenarios: 1) DIR_DEP_DISTRIB is encrypted and GVT_PAM_SAL_DTL is decrypted, or 2) GVT_PAM_SAL_DTL is encrypted and DIR_DEP_DISTRIB is decrypted.



This example illustrates the error message that appears online when the PeopleSoft Payroll for North America: Treasury Interface Extract Page is saved and one or more of the bank account numbers is not encrypted on these records: GENL_DEDUCTION, GVT_DED_DIST, GVT_GARN_SPEC, GVT_GARN_SPEC, GVT_PAM_VEN_SUM, and GVT_TAX_ROUTING.



If the Treasury Interface Extract run control page was saved in the database before encryption was run, the Out-of-Sync messages will not appear online when the page is saved. Instead, the Out-of-Sync messages will be added to the FGPY040 log file.

To ensure that the Treasury Interface Extract process runs successfully, you must first encrypt these source records:

- DIR_DEP_DISTRIB
- GENL_DEDUCTION
- GVT_DED_DIST

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- GVT_GARN_SPEC
- GVT_PAM_SAL_DTL
- GVT_PAM_VEN_SUM
- GVT_TAX_ROUTING

Decrypting Account Numbers

If the need arises, account numbers can be decrypted on the Manage Encryption and Masking Page.

Specify *Decrypt* as the action for the source record you want to decrypt. The available values are controlled based on the Action value for the source record. Here are the examples for Payroll for North America:

- DIR_DEP_DISTRIB options:

  For the *Decrypt* action, the Process Record Mask value can be *Do not Unmask* or *Unmask*.

- GARN_SPEC and SRC_BANK option:

  For the *Decrypt* action, the Process Record Mask value is *None* (default and display only).

Suppose that the DIR_DEP_DISTRIB source record is decrypted, after the process completes, the run control status is *Decrypted* and the action is *None* (default).

> **Note**
>
> When you run the decryption process on a source record, the process decrypts the encrypted data for *all* entries in that source record, even though the data selection for the encryption of the source record was country-specific.

Related Topics

- Understanding the Encryption Framework
  The Encryption Framework provides pages for identifying sensitive information in applications and an application engine (AE) process that encrypts and masks sensitive data that is stored in the database.
- Setting Up the Encryption Framework
  This topic discusses how to set up the Encryption Framework.

Understanding Data Encryption for Payroll Interface

This topic provides additional information about the implementation of the bank account number encryption that is specific to Payroll Interface.

> **Note**
>
> This topic applies to Payroll Interface customers who are subject to the Nacha requirements and are maintaining bank account information in the system in order to export that information to a third-party payroll system.

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The content is grouped into these sections:

> **Note**
>
> The HCM Encryption Framework is a shared data encryption tool that is used in products such as Payroll for North America and Payroll Interface. This list contains links to sections with common encryption information that is applicable to both products, as well as links to the sections that are specific to Payroll Interface only.

- Encryption Source Records
- Things to Consider Before Running Encryption
- Delivered Role For Viewing Unmasked Data
- Map Batch Process
- Direct Deposit Installation Options and Data Masking
- Audit Records
- Electronic Files
- Special Considerations After Applying the Payroll Interface Uptake
- Decrypting Account Numbers

Video: Image Highlights, PeopleSoft HCM Update Image 40: HCM Encryption Product Uptakes

Encryption Source Records

To comply with Nacha's data security requirements, Payroll Interface uses the Encryption Framework to encrypt and mask bank account numbers stored in the database for direct deposits.

When the DIR_DEP_DISTRIB source record is encrypted, bank account numbers are masked in the database and on these pages:

- (USA and CAN) PeopleSoft Payroll for North America: Request Direct Deposit Page (administrator page).
- PeopleSoft ePay: Direct Deposit Page (employee self-service page).

> **Note**
>
> Users can still view unmasked bank account numbers on these pages after the encryption based on their user role and the installation options for Direct Deposit pages. For more information, see Delivered Role For Viewing Unmasked Data and Direct Deposit Installation Options and Data Masking.

Refer to Encryption Source Records for a list of source records that are delivered for bank account number encryption using the HCM Encryption Framework.

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Things to Consider Before Running Encryption

The encryption (or decryption) process for the bank account numbers should only be run when users are not allowed to access or update the bank account numbers in the database.

In most cases, the encryption process needs to be run only once unless there is compelling reason to do so again later (for example, changing to a new encryption profile). While it is not practical to prevent users from accessing the system during the encryption run, there are certain pages, and processes from which users must be locked out in order to prevent inconsistent or unpredictable outcomes. The pages and processes are:

- Employee Self-Service Direct Deposit page.
- Administer Request Direct Deposit page.
- Export processes.

Delivered Role For Viewing Unmasked Data

Payroll Interface uses the *Bank Account Admin* role to allow the administrator(s) to view unmasked account numbers for direct deposits on the Request Direct Deposit (administrator page).

See Also Grant Unmasked Access Page.

Map Batch Process

The Batch Process mapping is used to identify application batch processes that are required to include the actual account numbers. Without this configuration, application batch processes will always output masked account numbers.

Payroll Interface has one process, PI_INRUN, defined for on the Map Batch Processes Page of the encryption setup.

Electronic Files

Account numbers are always unmasked on the export files even when DIR_DEP_DISTRIB is encrypted.

Special Considerations After Applying the Payroll Interface Uptake

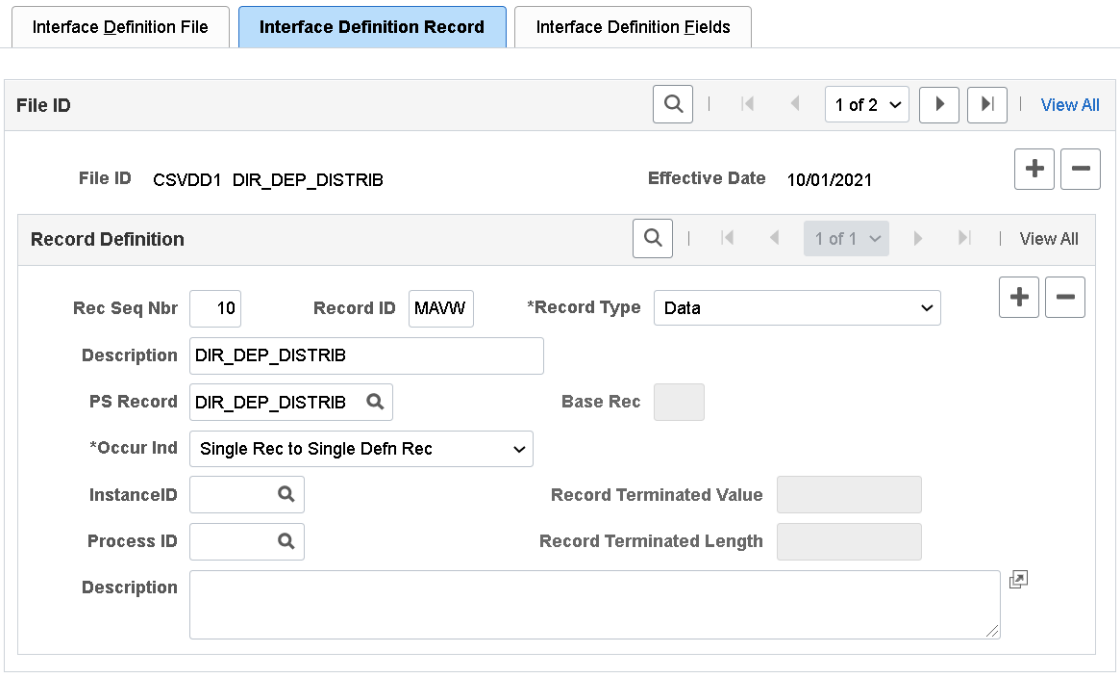
If you are using the delivered record view DIR_DEP_VW as the source of your bank account information, this uptake will handle this without additional changes. This record view is modified by this uptake and will only return rows when the Export process is running.

> **Note**
>
> The modified record view DIR_DEP_VW will retrieve data only when the Export process is running. If you want to query Direct Deposit data even though the account number is encrypted, use the new delivered view DIR_DEP_MASK_VW. This definition is a clone of the previous version of DIR_DEP_VW.

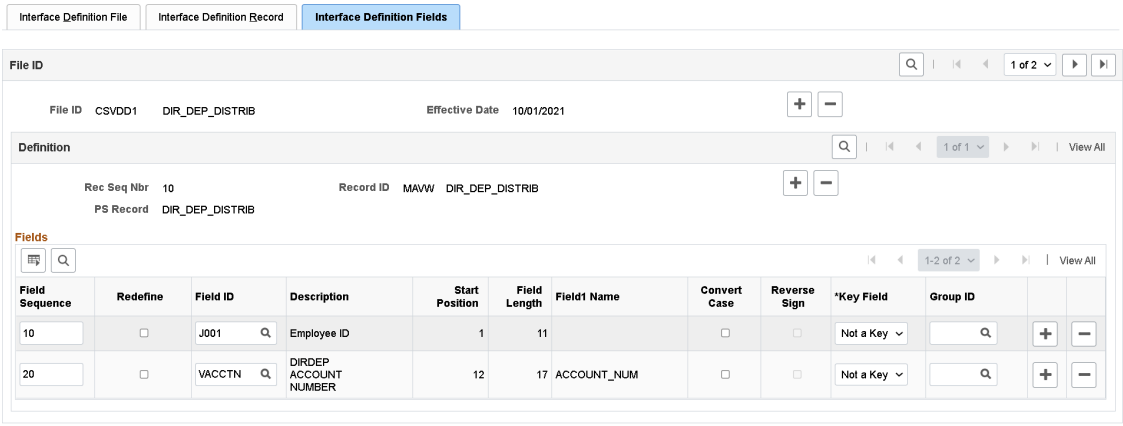
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If you encrypted DIR_DEP_DISTRIB, and you find that there are masked account numbers in your export files, you might be using a record definition other than DIR_DEP_VW as the source of your bank account information.

This is an example of an Interface Definition record that uses DIR_DEP_DISTRIB as the PS record on the Interface Definition Record page.



This is an example showing that the ACCOUNT_NUM field from DIR_DEP_DISTRIB is used as an Interface Definition field on the Interface Definition Fields page.

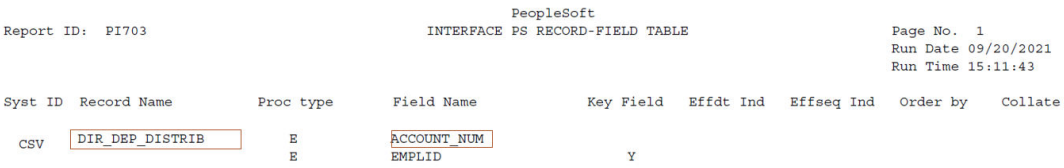


To identify the ACCOUNT_NUM field in your Payroll Interface environment, you can run the *Interface PS Record-Field Table* report.

Navigation: **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Interface Definition Reports**, and then **PS Record-Field Listing**

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This example displays the Interface PS Record-Field Table report, which shows that the ACCOUNT_NUM field is available from the DIR_DEP_DISTRIB record.



PeopleSoft
Report ID: PI703 INTERFACE PS RECORD-FIELD TABLE Page No. 1
Run Date 09/20/2021
Run Time 15:11:43

Syst ID	Record Name	Proc type	Field Name	Key Field	Effdt Ind	Effseq Ind	Order by	Collate
CSV	DIR_DEP_DISTRIB	E	ACCOUNT_NUM					
		E	EMPLID	Y				

If it is determined that the ACCOUNT_NUM field is drawn from a different record other than DIR_DEP_VW, you may have to create a new record view (or modify if using an existing record view) and JOIN the underlying tables to DIR_DEP_VW from where the bank account number will be drawn. You will need to configure this new record in your environment using these pages:

Set Up HCM, and then **Product Related**, and then **Payroll Interface**, and then **Interface Control**, and then **PS Tables**

Set Up HCM, and then **Product Related**, and then **Payroll Interface**, and then **Interface Control**, and then **Field Definition Table**

Set Up HCM, and then **Product Related**, and then **Payroll Interface**, and then **Interface Controls**, and then **Definition Table**

> **Important**
>
> If you create a new record view to retrieve bank account numbers, remember that the Build Sequence No (shown in Application Designer) of the new record view must be higher than that of DIR_DEP_VW.

After you have completed the review of your Payroll Interface definitions and made the corresponding changes, it is recommended to create a new baseline to serve as the new starting point to your next Export run.

> **Important**
>
> Do not run any Payroll Interface processes while you are making changes to your setup or creating the new baseline.

To create a new baseline, you need to remove the data from Payroll Interface tables. To do so, run the following SQL statements in your database.

> **Note**
>
> Back up the data for your Payroll Interface tables before running these SQL statements.

```
DELETE PS_PI_EMPLID_TBL;
```


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DELETE PS_AERUNCONTROL WHERE AE_APPLID = 'PI_INRUN';

DELETE PS_PI_EXTIO;

DELETE PS_PI_PARTIC_EXTBL;

DELETE PS_PI_PARTIC_EXPT;

DELETE PS_PI_PARTIC;

DELETE PS_PI_MESSAGE;

DELETE PS_PI_RUN_TBL;

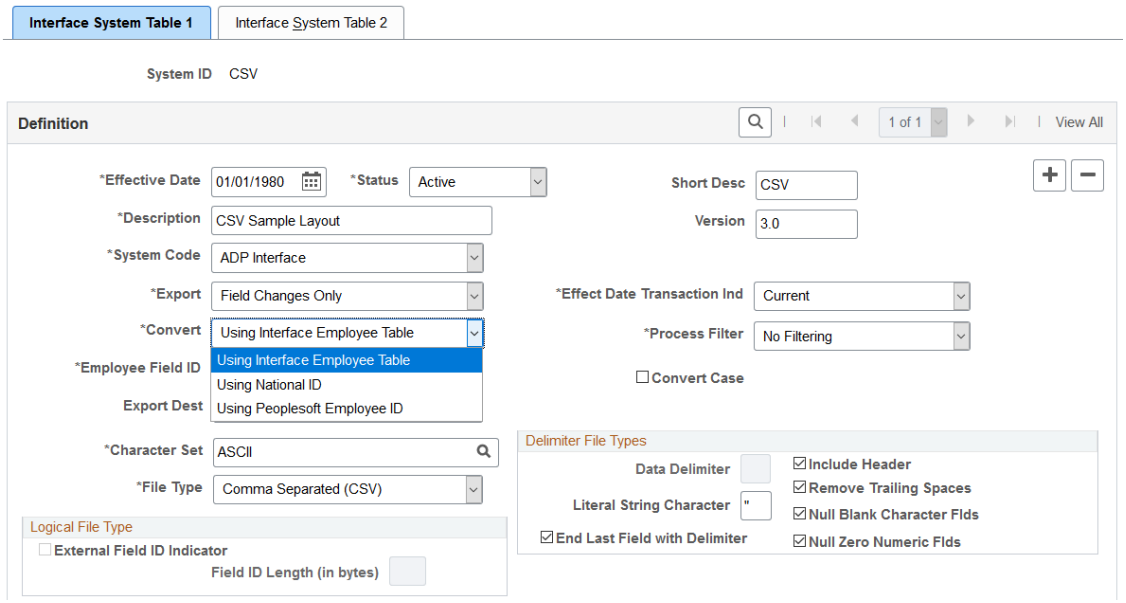
DELETE PS_PI_RUN_PYGRP;

DELETE PS_PI_RUNCTL;

Once you have backed up and removed the data from the Payroll Interface tables, review the configuration of your Payroll Interface system ID.

Navigation: **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Interface Control**, and then **System Table**

This example shows the three Convert field values on the Interface System Table 1 page.



If the **Convert** field is *Using Interface Employee Table*, populate the PI_EMPLID_TBL table before running the Export process.

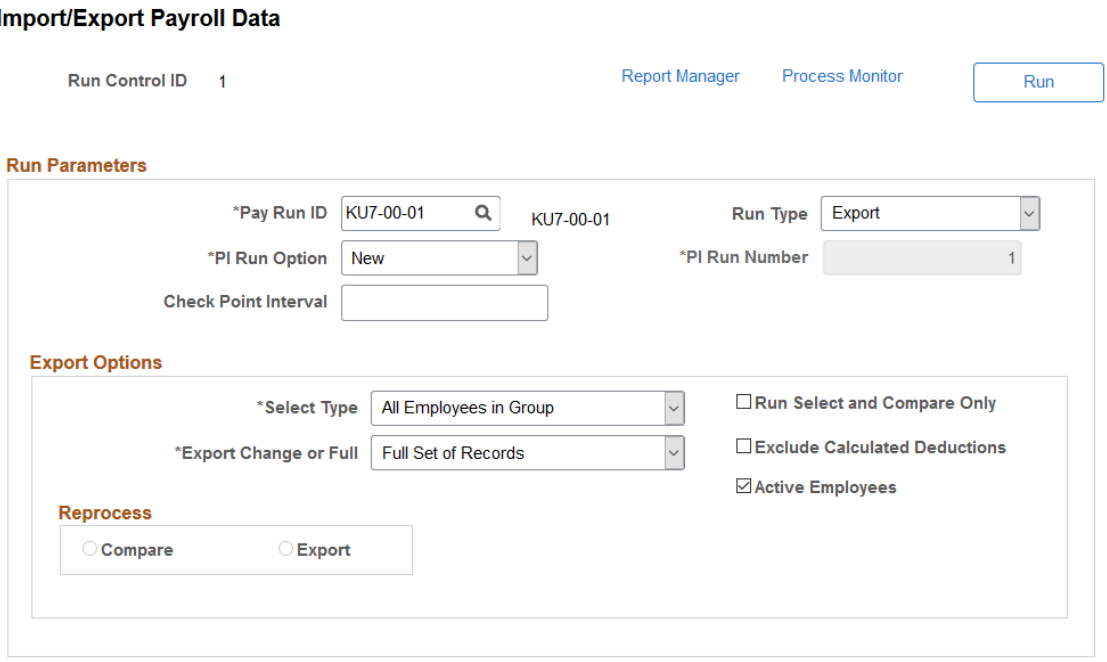
If the **Convert** field is *Using National ID* or *Using Peoplesoft Employee ID*, the Export process will populate the PI_EMPLID_TBL table automatically.

Once you have your data removed from the tables and reviewed your System Table configuration, you can perform a full Export to create the new baseline.

Navigation: **Payroll Interface**, and then **Payroll Data Exchanges**, and then **Import/Export Payroll Data**

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This example displays the Import/Export Payroll Data page, which shows the export parameters to perform a full export to create the new baseline.



Related Topics

- Understanding the Encryption Framework
  The Encryption Framework provides pages for identifying sensitive information in applications and an application engine (AE) process that encrypts and masks sensitive data that is stored in the database.
- Setting Up the Encryption Framework
  This topic discusses how to set up the Encryption Framework.

Setting Up the Encryption Framework

This topic discusses how to set up the Encryption Framework.

Pages Used to Set Up the Encryption Framework

Page Name	Definition Name	Usage
Define Country for Encryption Page	HSC_ENCCTRY	Add countries that need to encrypt and mask sensitive data.
Define Source Records Page	HSC_CRYPTRUN	Define encryption criteria.
Field Mapping Page	HSC_FLDSEL_SEC	View or change the field mapping of the data to be encrypted.
Grant Unmasked Access Page	HSC_ROLESEL_SEC	Specify roles for users to view unmasked data after data is encrypted.

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Page Name	Definition Name	Usage
Define Process Records Page	HSC_MASKREC	Define process records for batch processes that display unmasked data.
Manage Encryption and Masking Page	HSC_CRYPT_RCTL	Run the encryption process for specified source records.
Encryption Details Page	HSC_COUNTRY_SEC	View the list of countries whose data set from the source record is encrypted.
Map Batch Processes Page	HSC_PRCSSTG_MAP	Identify application batch processes that display unmasked data in output files.
Process Records Page	HSC_PRCSMSK_SEC	View the process record setup for the application batch process.
Maintain Process Page	HSC_PRCSCLEANUP_RC	Clean up residual data from the staging tables of the encryption process.

Encryption Administration Navigation Collection for Framework Setup

Use the Encryption Administration component to access the pages that are used to configure the Encryption Framework. Pages appear in the navigation collection for easy access.

Administrators must have the *Encryption Configuration Admin* role to access this setup component.

This example illustrates the Encryption Administration component, which lists pages that used to set up the Encryption Framework in HCM.



> **Note**
>
> In this topic, Payroll for North America is used as an example to demonstrate the setup of the Encryption Framework.

Video: Image Highlights, PeopleSoft HCM Update Image 39: HCM Encryption Configuration

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Encryption Framework Setup Steps

Here are the high-level steps for setting up the Encryption Framework:

1. Set up the administrator(s) with the new *Encryption Configuration Admin* role. This role allows the administrators to access the Encryption Administration component and configure the framework.

   Additionally, if you want the administrator(s) to be able to view unmasked data after encryption is run, create a role and assign it to the administrator(s). Add this role to the Grant Unmasked Access Page of the source records that store the data to be encrypted. Both Global Payroll for United States and Payroll for North America deliver user roles for this purpose.

2. Select the **Enable Encryption** check box on the HCM Options Page of the Installation Table.

3. Create Encryption and Decryption profile IDs to use in the framework. You may use existing profile IDs you have already created provided they are not based on 3DES algorithm, or create new profile IDs. Do not use any of the profiles provided as sample data.

   The 3DES encryption algorithm is now considered obsolete and is maintained for backward compatibility only. It is recommended that you create a new set of Encryption and Decryption profiles not based on 3DES and instead use another similar, but stronger algorithm (e.g., AES).

   For more information on Profiles, see the *Defining Encryption Profiles* topic in *PeopleTools: Security Administration*, “Securing Data with PeopleSoft Encryption Technology”.

   For more information on Encryption Algorithms, see the *Privacy Through Encryption* section of the *Understanding Data Security* topic in *PeopleTools: Security Administration*, "Securing Data with PeopleSoft Encryption Technology".

4. Review and update the Encryption Administration pages to set up the framework as needed.

   - Define Country for Encryption Page
   - Define Source Records Page
   - Define Process Records Page
   - Map Batch Processes Page

5. Run the Encryption process on the Manage Encryption and Masking Page.

Refer to these topics for additional information about the data encryption implementation that is specific to applications:

Understanding Data Encryption for Global Payroll for United States

Understanding Data Encryption for Payroll for North America

Define Country for Encryption Page

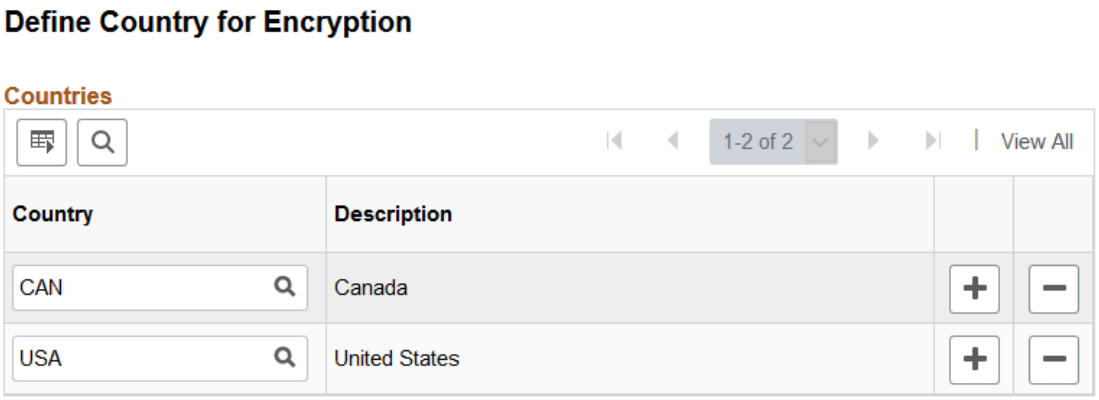
Use the Define Country for Encryption page (HSC_ENCCTRY) to add countries that need to encrypt and mask sensitive data.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Define Country for Encryption**

This example illustrates the fields and controls on the Define Country for Encryption page.



Field or Control	Description
Country	Add one or more countries that use the Encryption Framework to encrypt and mask data. This page is delivered without any values. In the Payroll for North America example, data (bank account numbers) will be encrypted for USA (which is required to satisfy Nacha requirements) and Canada to illustrate that the new functionality is also available to other countries.

Related Topics

- Special Considerations When Encrypting Data for an Additional Country
  This section describes what needs to be done when you want to encrypt data for a new country, using Payroll for North America as an example.

Define Source Records Page

Use the Define Source Records page (HSC_CRYPTRUN) to define encryption criteria.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Define Source Records**

This example illustrates the fields and controls on the Define Source Records page before the encryption process is run. Fields in the Encryption Criteria section are read-only.

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Define Source Records

Encryption Profile Details

Encryption Profile ID
Decryption Profile ID
Profile Status Pending
Validate Profiles

Encryption Criteria

1-15 of 15 View 4

Source Record	Data Selection Criteria	Country Field	Status				
DIR_DEP_DISTRIB	Country	COUNTRY_CD	None	Edit Fields	Grant Unmasked Access	+	−
GARN_SPEC	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GENL_DEDUCTION	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GP_RCP_PYE_DTL	Country	COUNTRY_CD	None	Edit Fields	Grant Unmasked Access	+	−
GVT_DED_DIST	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GVT_GARN_PAYEE	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GVT_GARN_SPEC	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GVT_PAM_SAL_DTL	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GVT_PAM_VEN_SUM	All Data		None	Edit Fields	Grant Unmasked Access	+	−

This example illustrates the fields and controls on the Define Source Records page after the encryption process is run, in which the fields in the Encryption Criteria section become editable.

Define Source Records

Encryption Profile Details

Encryption Profile ID PY_AES256_BANKACC_ENC
Decryption Profile ID PY_AES256_BANKACC_DEC
Profile Status Valid
Validate Profiles

Encryption Criteria

1-15 of 15 View 4

Source Record	Data Selection Criteria	Country Field	Status				
SRC_BANK	Country	COUNTRY_CD	Encrypted	Edit Fields	Grant Unmasked Access	+	−
DIR_DEP_DISTRIB	Country	COUNTRY_CD	Encrypted	Edit Fields	Grant Unmasked Access	+	−
GARN_SPEC	All Data		Encrypted	Edit Fields	Grant Unmasked Access	+	−
GVT_DED_DIST	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GENL_DEDUCTION	All Data		None	Edit Fields	Grant Unmasked Access	+	−
GP_RCP_PYE_DTL	Country	COUNTRY_CD	None	Edit Fields	Grant Unmasked Access	+	−

This screenshot shows the system-delivered data for Payroll for North America, which includes the DIR_DEP_DISTRIB (direct deposits), GARN_SPEC (garnishment), and SRC_BANK (source bank) source records. To comply with Nacha requirements, do *not* change the delivered data.

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Encryption Profile Details

Field or Control	Description
Encryption Profile ID, **Decryption Profile ID**, and **Validate**	Specify a profile that will be used by the framework to encrypt and decrypt data (bank account numbers in this example) respectively. You may use existing profile IDs you have already created provided they are not based on 3DES algorithm, or create new profile IDs. **Important:** The IDs in this screenshot are for illustration purposes only. Use your own set of profile IDs; do not use any of the profiles provided as sample data. Click the **Validate** button to verify the profiles specified. The system updates the profile status to *Valid* after the profiles are validated successfully. For more information about encryption profiles, see *PeopleTools: Security Administration*, "Securing Data with PeopleSoft Encryption Technology", Defining Encryption Details.

Encryption Criteria

Field or Control	Description
Source Record	Specify the "source-of-truth" record(s) that store and maintain the data to be encrypted and masked. For Payroll for North America, the source records for storing the data are DIR_DEP_DISTRIB, GARN_SPEC, and SRC_BANK. **Note:** The framework allows customers to add new source records with a corresponding source record field to store the encrypted data. Since the field name can be determined by the user, there is no validation to ensure the selections are correct when using the prompts.
Data Selection Criteria	Select the scope of data encryption. Values are: *All Data*: Selects all data in the record for encryption. *Country*: Selects data that belongs to the countries specified on the Define Country for Encryption Page for encryption.

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Field or Control	Description
Country Field	Enter the field in the source record that is used to identify the country to which a row of data belongs. This field becomes available for selection if the data selection criteria is set to *Country*. The lookup prompt shows the fields of the source record. For Payroll for North America, the framework uses the COUNTRY_CD field in DIR_DEP_DISTRIB and SRC_BANK records to identify country-specific data rows that are subject to encryption. Data (account numbers) that belongs to the countries (specified on the Define Country for Encryption page) from the corresponding source record will be encrypted.
Status	Displays the current encryption status of the source record. Values are: *None* (no action has been performed on the data in the source record – delivered value). *Encrypted* (data in the source record is encrypted). *Decrypted* (data in the source record is decrypted).
Edit Fields	Select to change the field mapping of the data to be encrypted on the Field Mapping Page, if needed. This page is editable when the source record is in the *Decrypted* status.
Grant Unmasked Access	Select to specify roles for users who can view unmasked data on the Grant Unmasked Access Page.

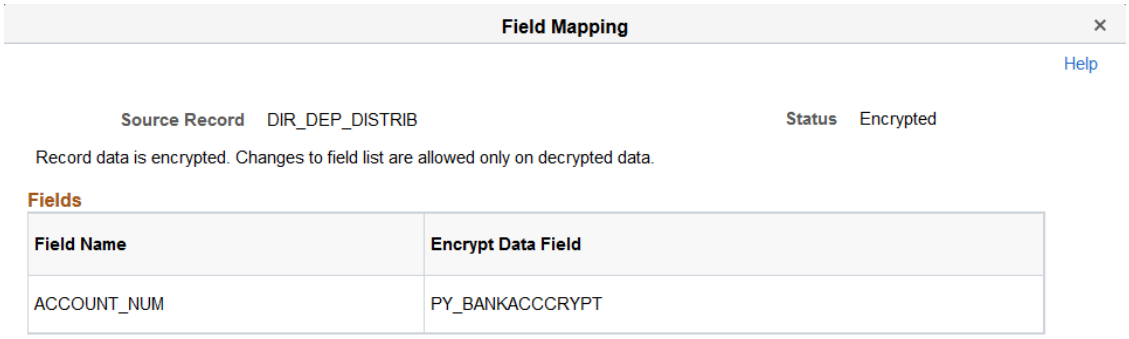
Field Mapping Page

Use the Field Mapping page (HSC_FLDSEL_SEC) to view or change the field mapping of the data to be encrypted.

Navigation:

Click the **Edit Fields** button on the Define Source Records page.

This example illustrates the fields and controls on the Field Mapping Page, which is displayed in read-only mode when the source record is encrypted.



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This screenshot shows the Payroll for North America setup example, where the ACCOUNT_NUM field stores the sensitive data (bank account numbers) in the DIR_DEP_DISTRIB source record, and the PY_BANKACCCRYPT field, a new field added to the same source record to store the encrypted data of the account numbers after the encryption process is run.

This page becomes editable when the source record is decrypted.

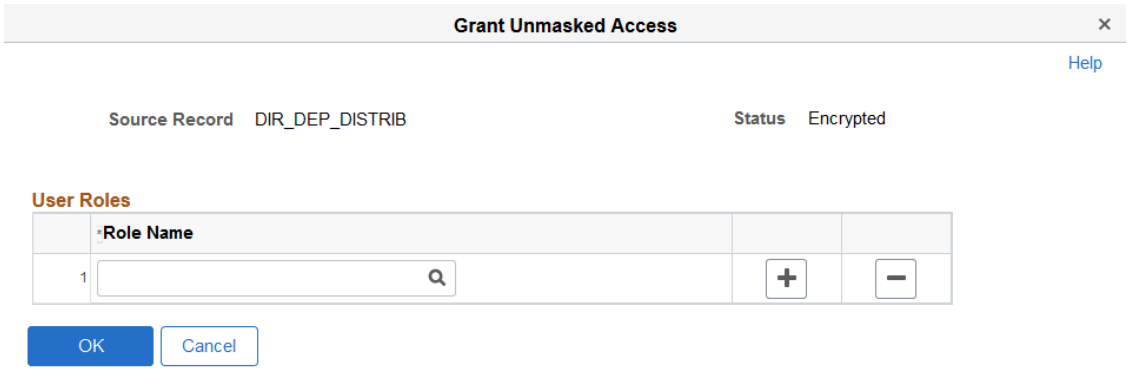
Grant Unmasked Access Page

Use the Grant Unmasked Access page (HSC_ROLESEL_SEC) to specify roles for users to view unmasked data after data is encrypted.

Navigation:

Select the **Grant Unmasked Access** button on the Define Source Records page.

This example illustrates the fields and controls on the Grant Unmasked Access page.



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Field or Control	Description
Role Name	Specify the role(s) that allow users (for example, administrators) to view the unmasked data when the data is masked for the rest of the users. If no one should be able to view masked data in its original form, do not enter any roles in this field. Both Global Payroll for United States, Payroll for North America, and Payroll Interface deliver user roles to grant users access to unmasked data. For more information about these roles, see the Delivered Roles For Viewing Unmasked Data (Global Payroll for United States), Delivered Roles For Viewing Unmasked Data (Payroll for North America), and Delivered Role For Viewing Unmasked Data (Payroll Interface) topics. For example, an employee added a direct deposit account in Self Service and the number is 12345678. Encryption is run for the DIR_DEP_DISTRIB source record, and the account number is masked and displayed as XXXX5678 on the direct deposit pages. However, when the *Bank Account Admin* role is specified in the Roles Name field, an administrator with this role will see the unmasked account number of 12345678 on the online pages even though the account number is encrypted and masked in the database.

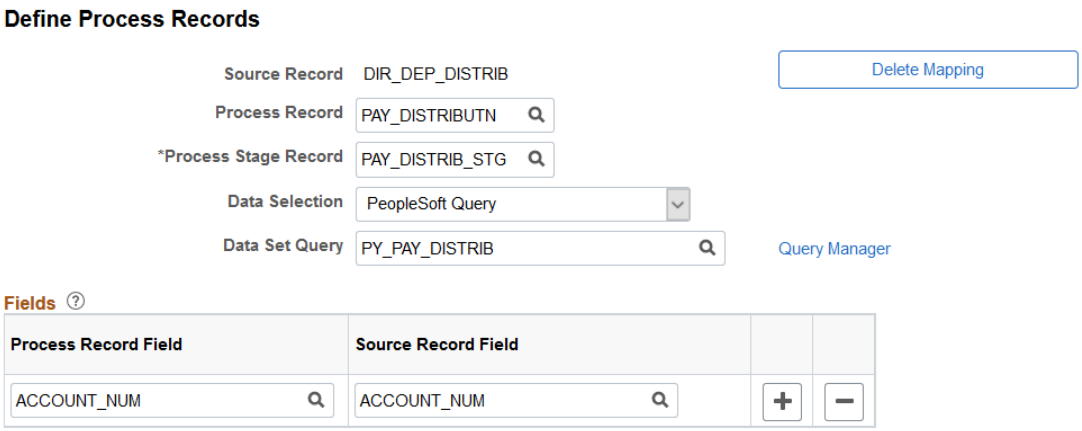
Define Process Records Page

Use the Define Process Records page (HSC_MASKREC) to define process records for batch processes that display unmasked data.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Define Process Records**

This example illustrates the fields and controls on the Define Process Records page.



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This screenshot shows the system-delivered data for Payroll for North America, which is the DIR_DEP_DISTRIB source record. To comply with Nacha requirements, do *not* change the delivered-system data for the **Process Record** and **Process Stage Record** fields.

Some applications have batch processes that display the sensitive data in its actual, unmasked form in the output files. For example, the account numbers that appear in direct deposit transmit files created by the DDP001 process need to be unmasked. For the unmasked data to display in its outputs after the encryption is run, the batch process (DDP001) copies the required data from the process record (defined on this page) to perform data unmasking in the stage record. The stage record structure must match the process record + one additional key field PROCESS_INSTANCE as the first key field.

Use this page to define an association between a process record (where the masked data is stored) and a source record (from where the application batch process retrieves the encrypted data to unmask the data coming from the process record).

> **Note**
>
> The framework allows the customers to define a process record with a corresponding process stage record to decrypt data. Since the field name can be determined by the user, there is no validation to ensure the selections are correct when using the **Process Record Field** and **Process Stage Record** field prompts.

Field or Control	Description
Process Record	Specify the record that contains the sensitive data that needs to be unmasked. The sensitive data is masked in the process record after the encryption process is run.
Process Stage Record	Specify the temporary record that will be used by the application batch process to unmask data, using the required data copied from the process record. The stage record structure must match the process record, plus one additional key field PROCESS_INSTANCE as the first key field.
Data Selection	Select the data selection option. Values are: *PeopleSoft Query*: Use this option if it is not possible to define a join between the source and process records. This usually requires additional tables to be used to build the join to define a 1:1 relationship for the data in the 2 records. For Payroll for North America, PeopleSoft Query SELECT should have all columns of the process record plus the account number field(s) from the source record. No other columns should be part of the SELECT. *Join Source Record*: Use this option of the key structure if source and process record can be mapped to define a 1:1 relationship for the data in the 2 records.

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Field or Control	Description
Data Set Query	This field is available if the Data Selection field is set to *PeopleSoft Query*. Use the **Query Manager** link to identify the PS Query to be used to define the data mapping between the process and source records. **Note:** PS Query will display the masked account numbers stored in ACCOUNT_NUM once encryption is run. At this time, we don't deliver a process to display the unmasked account numbers. **Note:** The framework allows the customers to define the query. Since the field name can be determined by the user, there is no validation to ensure the selections are correct when selecting the query name in the prompt.
Map Keys	This link is available if the Data Selection field is set to *Join Source Record*. Click to open a modal page to map the key fields between the process and the source record.

Fields

Field or Control	Description
Process Record Field and **Source Record Field**	Use **Process Record Field** to identify one or more fields from the specified process record that should be masked, and **Source Process Field** to specify their corresponding fields from the specified source record to get the actual values during the unmask process.

Manage Encryption and Masking Page

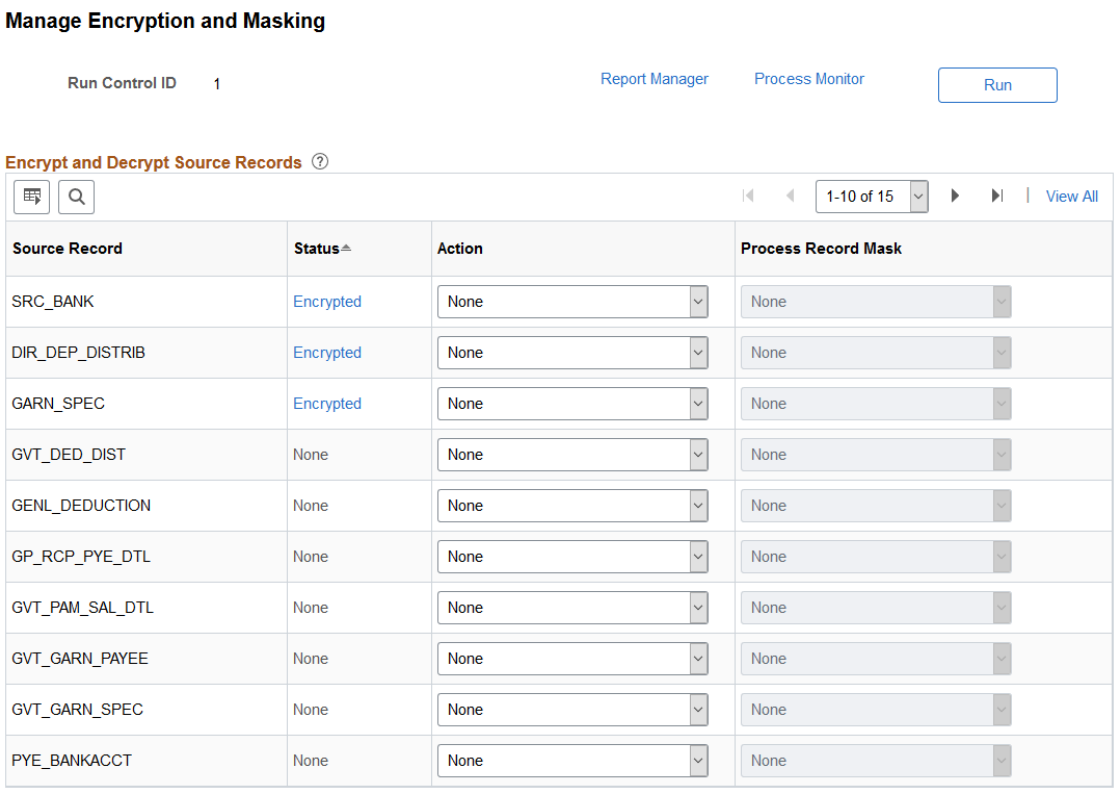
Use the Manage Encryption and Masking page (HSC_CRYPT_RCTL) to run the encryption process for specified source records.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Manage Encryption and Masking**

This example illustrates the fields and controls on the Manage Encryption and Masking page.

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Field or Control	Description
Run	Click to run the encryption and masking process (HCCRYPTAE) to encrypt (or decrypt) and mask (or unmask) data for the source records using the specified parameters. Encrypted data can only be viewed with a query; it's not available on any delivered online page.

Encrypt and Decrypt Source Records

Use this section to specify the parameters used to run the encryption process.

Field or Control	Description
Source Record	Displays the "source-of-truth" records that are defined on the Define Source Records Page.
Status	Displays the current encryption status of the source record. Values are: *Decrypted* *Encrypted*: Click the link to view the list of countries with encrypted data from the source record on the Encryption Details Page. *None*

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Field or Control	Description
Action	Select an action to be performed on the source record. Available values are based on the current encryption status: *None*: available to all statuses. *Decrypt*: available when the status is *Encrypted*. *Encrypt*: available when the status is *None* or *Decrypted*.
Process Record Mask	Select a masking action to be performed on the process record. Available values are: *Always Mask* *Do Not Unmask* *None* (this is the only available mask action if the source record is not associated with any process record) *Unmask* The availability of these mask values are controlled based on the current action value for the source record. For example, for Payroll for North America, the following values are available for the DIR_DEP_DISTRIB source record: *Always Mask*: available when the action is *Encrypt*. *Do Not Unmask*: available when the action is *Decrypt*. *None*: available when the action is *None*. *Unmask*: available when the action is *Decrypt*. For the GARN_SPEC and SRC_BANK source records, the only available mask action is *None*.

Encryption Details Page

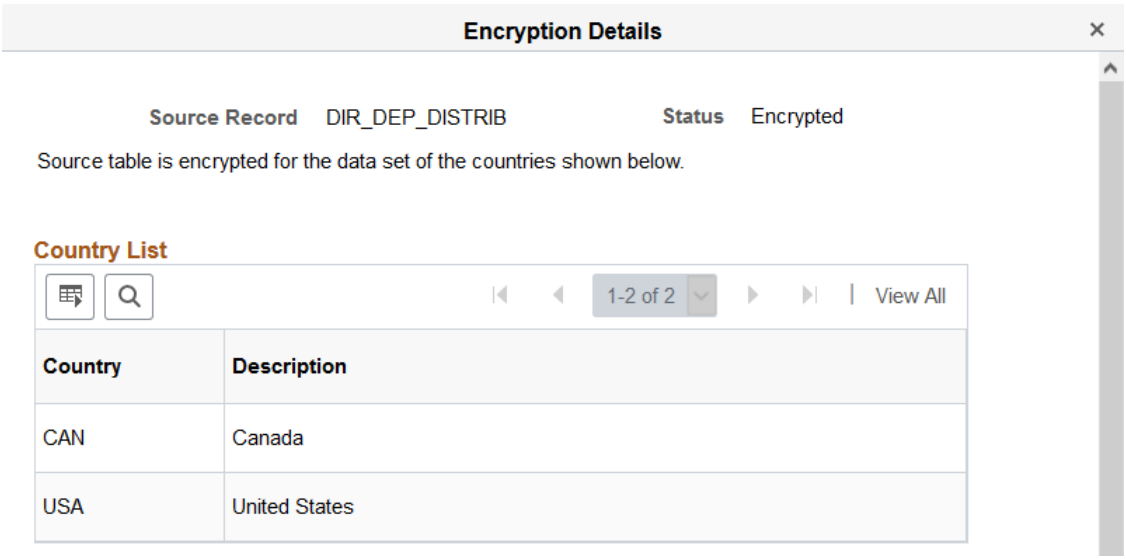
Use the Encryption Details page (HSC_COUNTRY_SEC) to view the list of countries whose data set from the source record is encrypted.

Navigation:

Select the **Encrypted** link on the Manage Encryption and Masking page.

This example illustrates the fields and controls on the Encryption Details page.

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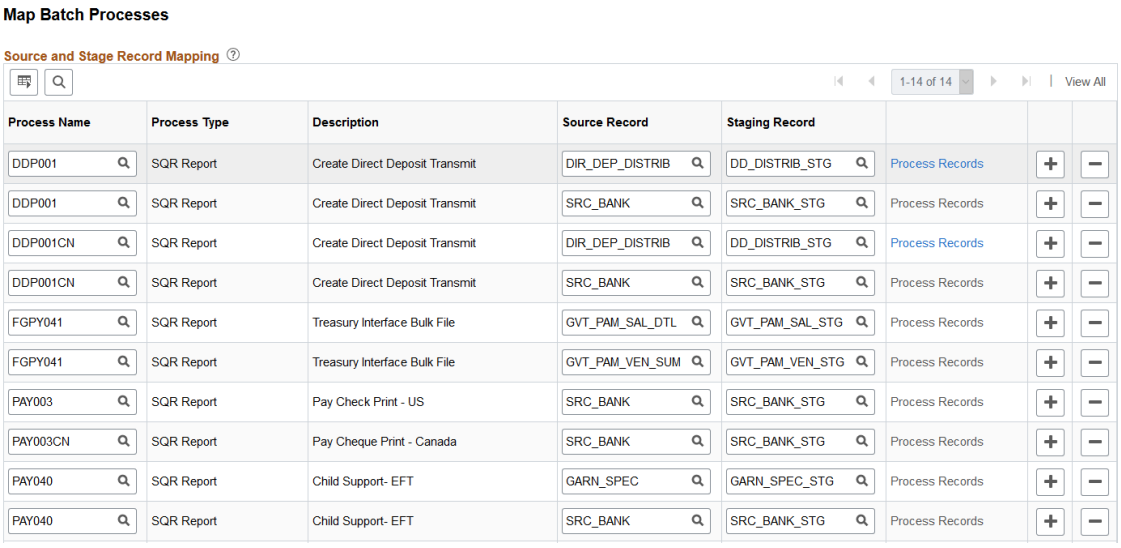
Map Batch Processes Page

Use the Map Batch Processes page (HSC_PRCSSTG_MAP) to identify application batch processes that display unmasked data in output files.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Map Batch Processes**

This example illustrates the fields and controls on the Map Batch Processes page.



This batch process mapping is used to identify application batch processes that are required to output the actual data. Without this configuration, application batch processes will always show masked data in the output.

This screenshot shows the system-delivered data for Payroll for North America. To comply with Nacha requirements, do not change the delivered data.

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This setup step is not required for Global Payroll for United States.

Field or Control	Description
Process Name	Specify an application batch process that is required to include the actual data in its output.
Source Record	Specify the source-of-truth record to retrieve the encrypted data.
Staging Record	Specify the source staging record, which is a clone of source record with PROCESS_INSTANCE as the additional key field. During the batch process run-time, the framework process will copy the required data from source record over to the stage record for decryption.
Process Records	Click the link to view the process record setup (available on the Define Process Records Page) for the application batch process.

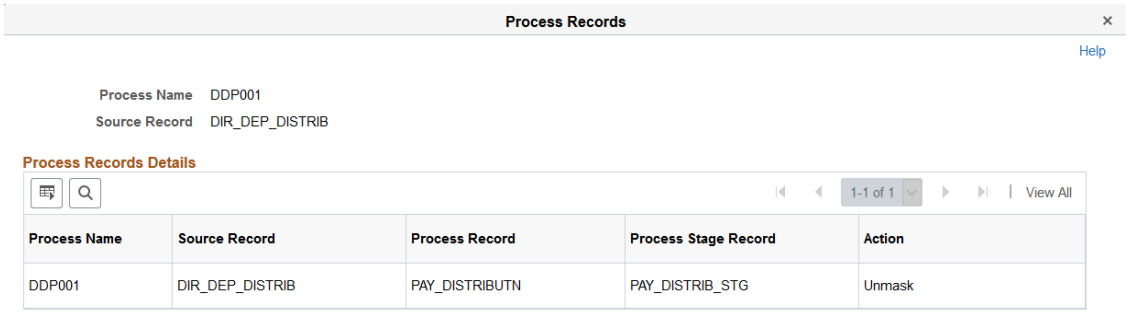
Process Records Page

Use the Process Records page (HSC_PRCSMSK_SEC) to view the process record setup for the application batch process.

Navigation:

Select the **Process Records** link on the Map Batch Processes page.

This example illustrates the fields and controls on the Process Records page.



The source record, process record, and process stage record setup is defined on the Define Process Records Page.

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Field or Control	Description
Process Stage Record	The process stage record is a clone of the process record plus PROCESS_INSTANCE as the additional key field. During the application batch process run-time, the framework process will copy the required data from the process record over to the process stage record. After copying the data, the framework process unmasks the data in the process stage record using the decrypted data in the source stage record. The application batch process can then retrieve the actual data (bank numbers in Payroll for North America).
Action	Displays the *Unmask* value, which means that the data in the process stage record will be unmasked during the application process run-time.

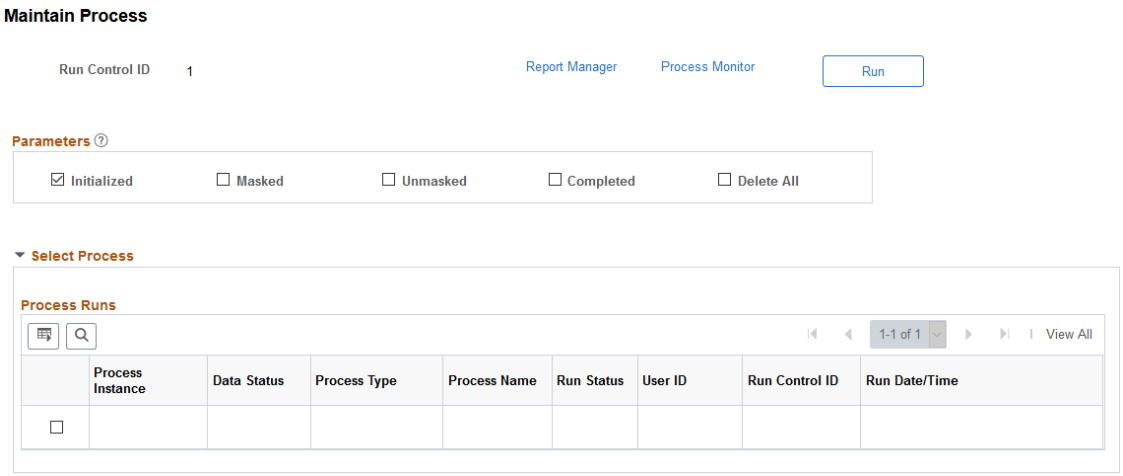
Maintain Process Page

Use the Maintain Process page (HSC_PRCSCLEANUP_RC) to clean up residual data from the staging tables of the encryption process.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Encryption Configuration**, and then **Encryption Administration**, and then **Maintain Process**

This example illustrates the fields and controls on the Maintain Process page.



Parameters

Select a parameter to search for residual data of the corresponding status in the staging tables that may contain unmasked or decrypted data. Residual data may be caused by incorrect or unsuccessful runs in the staging tables.

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Field or Control	Description
Delete All	Select to mark all process runs for deletion. This option can be used to remove the staging table data for all process instances.

Process Runs

The system populates the Process Runs grid with process instances of the selected status, if applicable. You can select specific process instances to clear residual data. This grid does not apply to the **Delete All** option.

Special Considerations When Encrypting Data for an Additional Country

This section describes what needs to be done when you want to encrypt data for a new country, using Payroll for North America as an example.

Suppose that you ran the encryption process to encrypt direct deposit account numbers for USA to comply with Nacha requirements. Now, you have decided to run it for Canada as well to enhance data security. You need to decrypt all encrypted data from the source record, add the new country, and encrypt data for all selected countries.

Follow these steps:

1. Run the decryption process on the Manage Encryption and Masking Page to decrypt all direct deposit account numbers previously encrypted for USA.

   Select the *Decrypt* action for the DIR_DEP_DISTRIB source record. Run the process. After the process completes, all account numbers for USA will be unmasked in the database.

2. Add CAN to the country list on the Define Country for Encryption Page. The page now shows both USA and CAN.

3. Run the encryption process on the Manage Encryption and Masking Page to encrypt direct deposit account numbers for both countries.

   Select the *Encrypt* action for the DIR_DEP_DISTRIB source record. Run the process. After the process completes, all account numbers for USA and CAN will be masked in the database.

4. Run the *Mask Direct Deposit Audit Rcd* process. This process masks the direct deposit account numbers for Canadian employees. Previously masked account numbers remain unchanged.

   Note that the *Mask Direct Deposit Audit Rcd* process can be run to mask account numbers in the audit records for direct deposits and general deductions. For more information, see Audit Records.

This procedure applies to other scenarios involving different source records and countries.

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7

Setting Up and Installing PeopleSoft HCM

Setting Up Implementation Defaults

To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

These topics provide an overview and discuss implementation defaults.

> **Note**
>
> In addition to the defaults that you define here on the Installation Table component, additional product-specific installation tables may exist that enable you to view or set system-wide defaults specific to the product. To identify product-specific installation tables, navigate to **Set Up HCM**, and then **Install**, and then **Product Specific**, and then consult the respective product documentation for more information.

Pages Used to Set Up and Report on Implementation Defaults

Page Name	Definition Name	Usage
Products Page	INSTALLATION_TBL1	Specify the PeopleSoft applications for your installation.
Global Payroll Country Extensions Page	INSTALL_GP_SEC	Select the PeopleSoft Global Payroll country extensions you are implementing.
Installed Integration Products Page	INSTALL_PIP_SEC	Select the payroll integration pack you are using, if applicable.
HCM Options Page	INSTALLATION_TBL1B	Specify how to drive your system: by person, by position, or both. Enter the PeopleSoft HCM defaults that are related to your organizational policies.
Product Specific Page	INSTALLATION_TBL1A	Enter product- and industry-specific installation information.
Country Specific Page	INSTALLATION_TBL3	Enter country-specific installation information.
Installed HR Countries Page	INSTALLATION_SEC	Specify which local country functionality to activate for users in PeopleSoft Human Resources.

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Page Name	Definition Name	Usage
Last ID Assigned Page	INSTALLATION_TBL2	Specify the number that the system uses to start assigning numbers.
Third Party/System Page	INSTALLATION_TBL4	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HCM. Define parameters for using third-party applications such as Visio.
Alternate Character Page	ALT_CHAR_TBL	Specify the language code and alternate character type.
Installation Table Report - Run Control Page	PRCSRUNCNTL	Run the Installation Table report (PER702). This report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Understanding Implementation Defaults

For each site where you implement PeopleSoft HCM, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is *required.*

> **Warning**
>
> You must complete the information on the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) for each primary permission list. Most of the defaults in PeopleSoft HCM come from the Org Defaults by Permission Lst component and not the Installation Table pages. Other PeopleSoft HCM applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Human Resources, all defaults are based on the settings that you make on the Org Defaults by Permission Lst component. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

See Setting Up Primary Permission List Preferences.

When you access the Installation Table pages for the first time, you'll see that PeopleSoft has already entered information for a sample company that you can use as a guide. After you enter your installation information, log off to save your changes.

Products Page

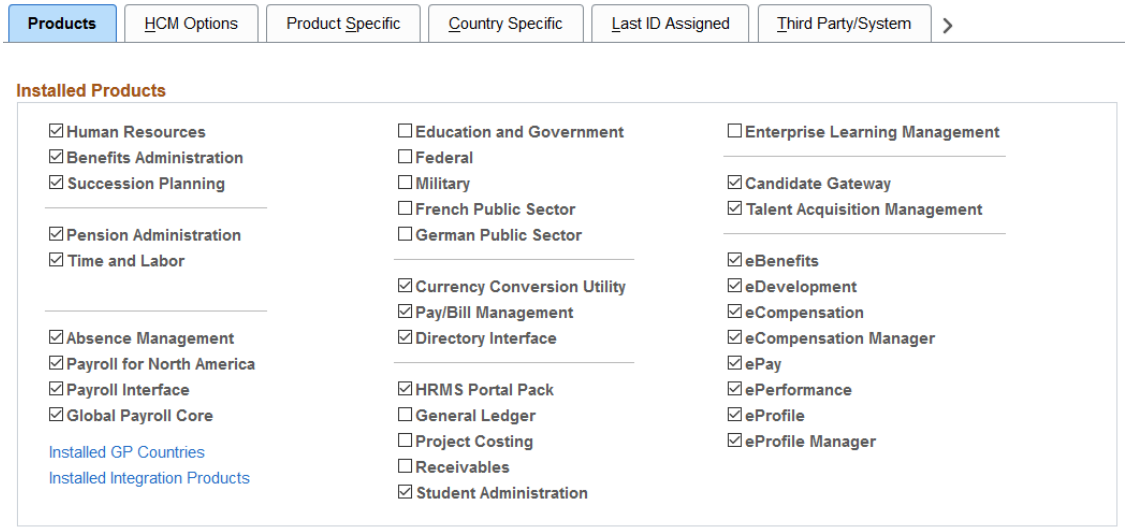
Use the Products page (INSTALLATION_TBL1) to specify the PeopleSoft applications for your installation.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Products**

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



Select the applications you are installing. To access that application's functionality, you must select it on this page.

If you are implementing PeopleSoft Global Payroll, select the **Installed GP Countries** link to select the Global Payroll country extensions you are implementing.

If you are implementing an integration product, select the **Installed Integration Products** link to select the integration product.

(USF) Setting Up PeopleSoft HCM for Federal Functionality

To set up your database for U.S. federal government functionality, select **Federal** on the Installation Table - Products page and update the Org Defaults by Permission Lst component to point to the U.S. federal government industry and sector.

To set up your database for military functionality, select **Military**on the Installation Table - Products page.

Make your primary permission list preference changes on the Settings page of the Org Defaults by Permission Lst component. To set up a federal database, select an Industry of Government and an Industry Sector of *US Federal.*

Installed Integration Products Page

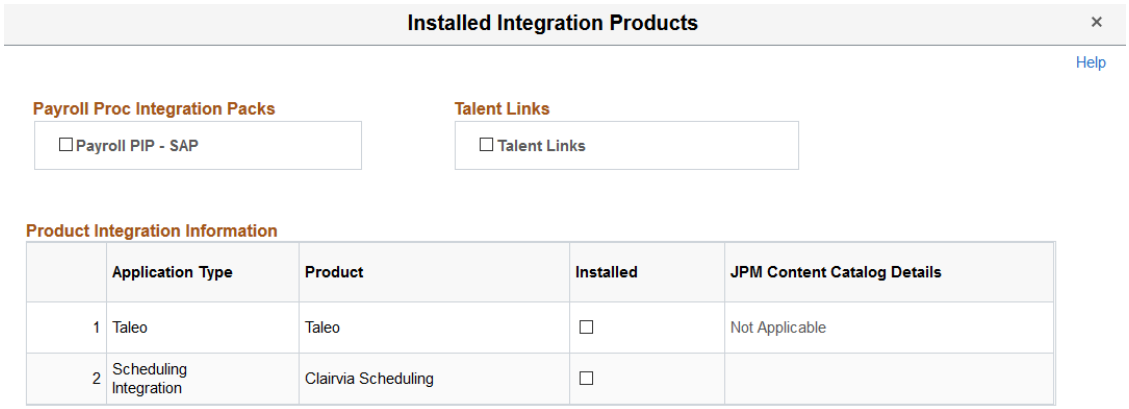
Use the Installed Integration Products page (INSTALL_PIP_SEC) to select the integration products you are using, if applicable.

Navigation:

Click the **Installed Integration Products** link on the Products page.

This example illustrates the fields and controls on the Installed Integration Products page.

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Payroll Proc Integration Packs

Field or Control	Description
Payroll PIP - SAP	Select this option if you license and implement the payroll process integration pack for SAP.

Talent Links

Field or Control	Description
Talent Links	Select this option if you license and implement the Talent Integration Management solution. The Talent Integration Management solution enables you to integrate between two instances of HCM on different releases, and utilize new functionality delivered in the newer system without having to perform a full upgrade. For example, as you run your core HR products on an older HCM instance, you can integrate with another HCM instance running on the current release using Talent Integration Management, and be able to take advantage of all the new Talent Management features offered on that release.

Product Integration Information

Select any integrated products listed in this section that are installed in your HCM system.

HCM Options Page

Use the HCM Options page (INSTALLATION_TBL1B) to specify how to drive your system: by person, by position, or both.

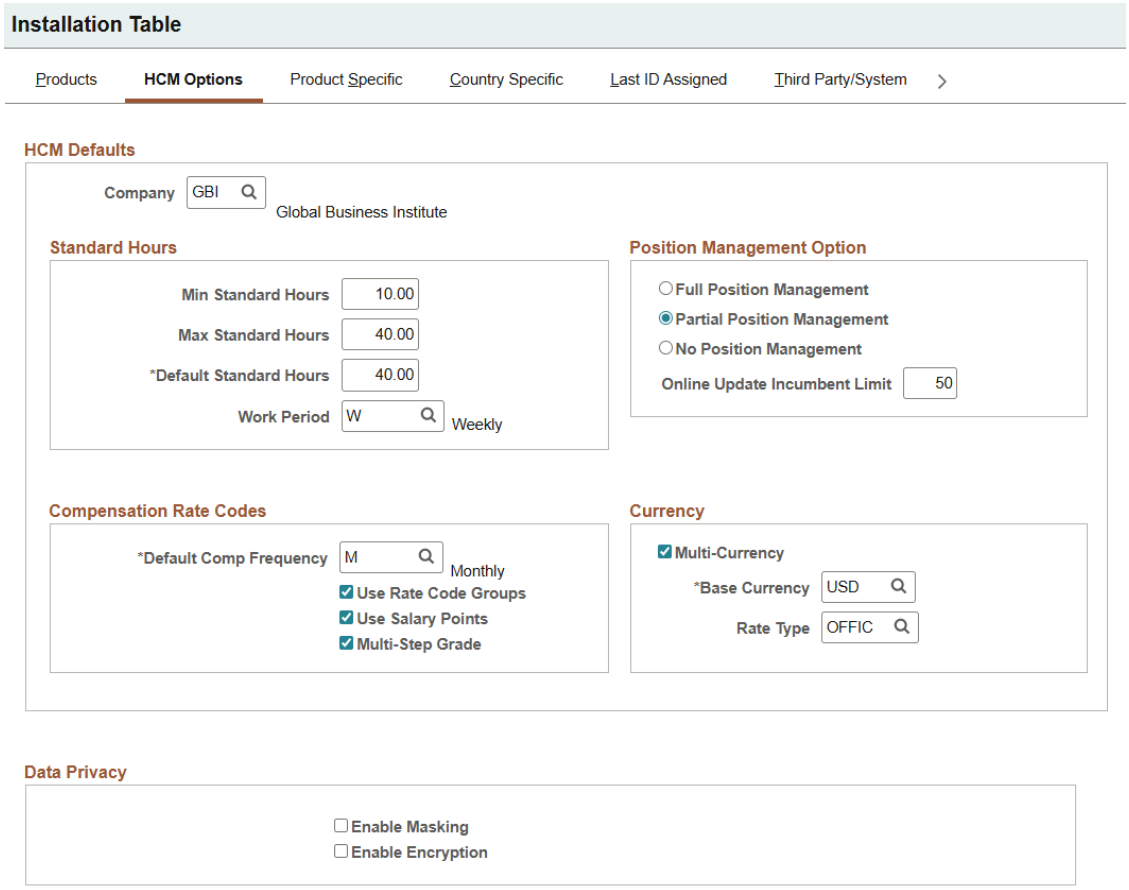
Enter the PeopleSoft HCM defaults that are related to your organizational policies.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **HCM Options**

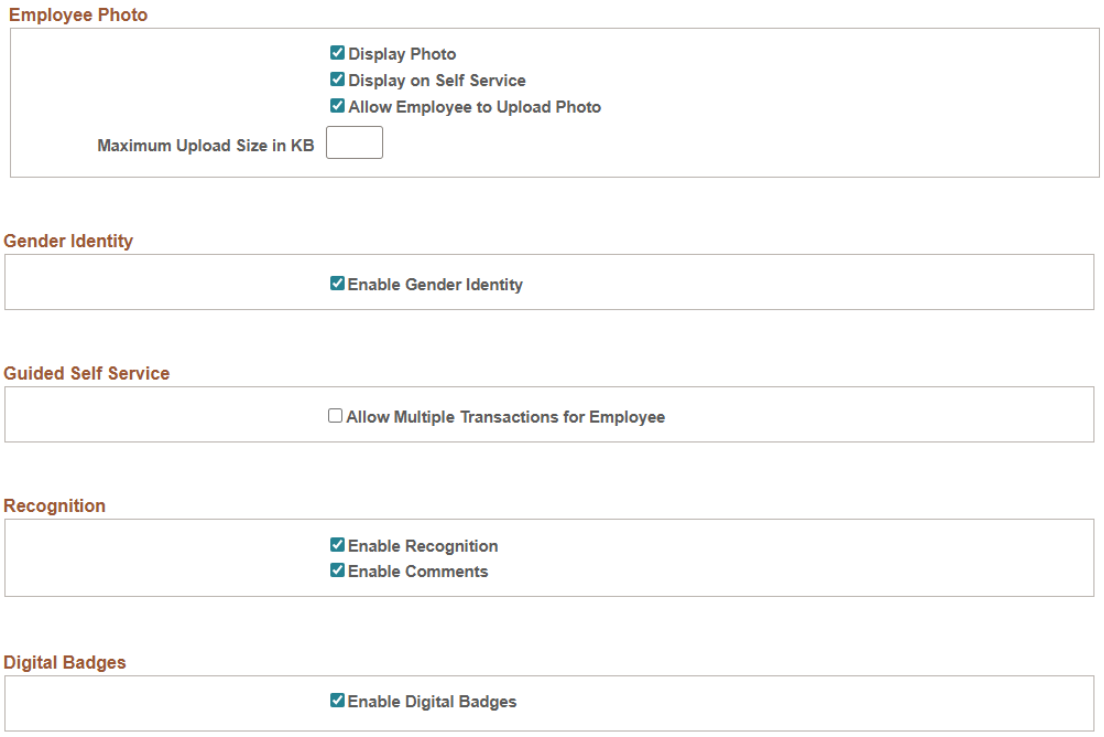
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This example illustrates the fields and controls on the HCM Options page (1 of 3). You can find definitions for the fields and controls later on this page.

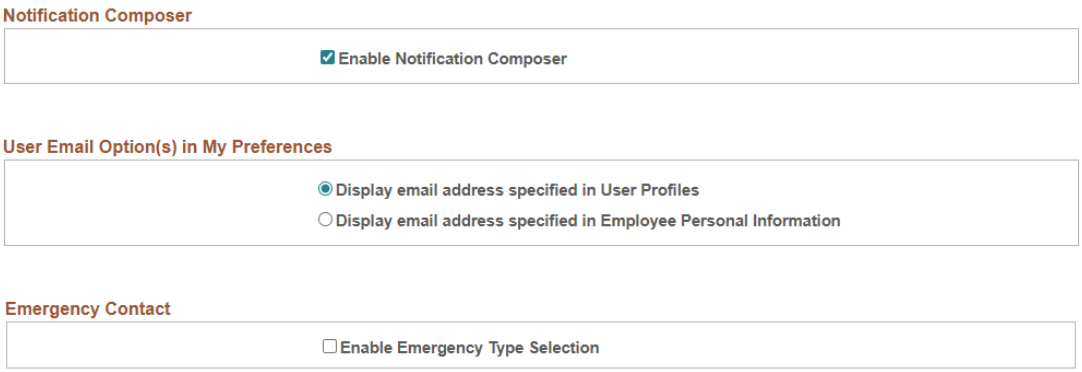


This example illustrates the fields and controls on the HCM Options page (2 of 3). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the HCM Options page (3 of 3). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Company	Select the default company code. The system uses this default in several tables in PeopleSoft Human Resources. For a single-company organization, enter the code for that company; for multicompany environments, determine which company is most appropriate.

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Standard Hours

To use this functionality to control payroll input in PeopleSoft Global Payroll, review your payroll and make sure that the elements reference the appropriate PeopleSoft Human Resources items. The system does not use them automatically.

Field or Control	Description
Min Standard Hours (minimum standard hours) and **Max Standard Hours** (maximum standard hours)	Enter the minimum and maximum standard hours that workers are expected to work in the standard work period. The system enters this information as default values but you can override the values on either the Job Code component (JOB_CODE_TBL) or Position Data component (POSITION_DATA).
Default Standard Hours	Enter the number of hours in a standard work period at the company. This is a required field. When you define preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table component and the default standard hours value in the Salary Plan Table component (SALARY_PLAN_TABLE). PeopleSoft Human Resources uses standard hours to compute a full-time equivalency (FTE) value to prorate holiday hours and pay for part-time and hourly workers.
Work Period	Select a standard work period (the time period in which workers must complete the standard hours). Values are stored on the Frequency table. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE.

See Classifying Jobs.

Position Management Option

To drive part or all of the system by position, change the setting in this group box.

If you use PeopleSoft Pension Administration, don't use position management for your retiree organization. If you use position management for your workers, select **Partial** to exclude retiree departments.

> **Note**
>
> Using position management substantially alters the way that the system processes your data, and requires you to maintain data differently.

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Field or Control	Description
Full Position Management	The system expects that you track position data for all people in your organization and that you drive your human resource system by position, not by person.
Partial Position Management	The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Select to use the business process on a trial basis or for selected departments.
No Position Management	You drive your system by person. You can still assign position numbers to people, but the system doesn't use position data for job records, such as work phone or mail drop ID. This is helpful for tracking only certain positions, such as those above a particular management level.
Online Update Incumbent Limit	The system uses this number to capture the maximum number of incumbents in a position that will be updated online. The system default is 50, but you can adjust this amount based on your organization's server capabilities. If the number of incumbents for the position does not exceed the limit set here, the incumbent data is updated online. When saving data in the Position Data component, and the number of incumbents for the position exceeds the limit set here, the system will display a message that the update of incumbent data will be done through a batch process. The process is scheduled and another message with the process instance number of the job displays. The application engine program calls the Position Data CI so that the UpdateIncumbents function is invoked to perform the incumbent updates.

Compensation Rate Codes

Field or Control	Description
Default Comp Frequency (default compensation frequency)	Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.

See Classifying Jobs.

Field or Control	Description
Use Rate Code Groups	Select if your organization bundles rate codes to apply percentages when calculating compensation.
Use Salary Points	Select if your organization uses rate codes that have the rate code type points.

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Field or Control	Description
Multi-Step Grade	Select if your organization uses a multistep/ grade salary plan. This causes the system to use the Salary Step Components page (SALARY_PLAN_T3GBL) to determine compensation rates.

Currency

Field or Control	Description
Multi-Currency	Select if you use different types of currency to pay people. This option affects only PeopleSoft Payroll for North America. PeopleSoft Global Payroll uses a separate multicurrency in the payroll system. **Note:** Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS).
Base Currency	Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE). The code you select is the default currency that the system uses to calculate compa-ratios (percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft Payroll for North America, regardless of the currency that is used for individual line items. For example, if the U.S. dollar is your base currency, but your global salespeople submit expense reports in French francs, the system calculates the expense total in U.S. dollars by internally converting all line item amounts to U.S. dollars and displaying the total in U.S. dollars. **Note:** All currency defaults in PeopleSoft Human Resources are based on the base currency that you indicate on the Installation Table page, not the Org Defaults by Permission Lst component. The Org Defaults by Permission Lst component doesn't affect the currency defaults on the local country pages.

See Enterprise Components: Understanding Currencies and Market Rates.

Field or Control	Description
Rate Type	Identify the default rate type on which your currency conversion is based. Do this only if you haven't specified a default rate type for a primary permission list on the Org Defaults by Permission Lst component. The system checks the Org Defaults by Permission Lst component for a default rate type first; if none is specified, it looks at this value.

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Data Privacy

Field or Control	Description
Enable Masking	Select to enable the settings for sensitive data masking. See Implementing Sensitive Data Masking.
Enable Encryption	Select to enable data encryption using the Encryption Framework. The **Enable Masking** option is not part of the Encryption Framework and is not required to implement data encryption. However, Oracle recommends that you select the option as a general practice to protect your sensitive data. See Understanding the Encryption Framework.

Employee Photo

Field or Control	Description
Display Photo	Select to display a photo of the employee on application pages throughout the HCM system. Many application pages display employee photos using the Mouse Over Popup feature. For more information on employee photos and how to set up these popup pages displaying the employee photo, see Understanding Employee Photos and the Mouse Over Popup Page and Setting Up Mouse Over Popups. Deselect to turn off the employee photo display across the HCM application. When this option is deselected, the **Display on Self Service** and **Allow Employee to Upload Photo** check boxes on this page become unavailable for selection.
Display on Self Service	Select to display a photo of the employee on the self service and PeopleSoft Fluid User Interface pages, this includes the pages on ePerformance and the Org Chart Viewer, such as the Company Directory.

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Field or Control	Description
Allow Employee to Upload Photo	Select to enable employees to upload their own photo. By selecting this option, the **Update Photo** link or icon will appear beneath the employee photo on the self-service Personal Information Summary page, the PeopleSoft Human Resources Administer Workforce: Profile Page of the Org Chart Viewer or fluid Company Directory (see PeopleSoft Human Resources Administer Workforce: Company Directory Profile Page Layout), and the Personal Details page of the PeopleSoft Fluid User Interface (see PeopleSoft eProfile: (Fluid) Reviewing and Updating Personal Information). When this option is enabled, the employee can select the **Update Photo** link or icon to select a photo display option. The employee can chose to display: • No photo (this option displays a default photo image). • The official HR photo that is stored in the system. • A personal photo he or she has uploaded. When deselected, the **Update Photo** link or icon will not be available on the self-service pages. However, administrators still have the ability to upload the official HR system photo on the Identification Data - PeopleSoft Human Resources Administer Workforce: Employee Photo Page.
Maximum Upload Size in KB	Enter the maximum image file size that a user is allowed to upload for their photo. The maximum size can be set to 9999 kilobytes, however, Oracle recommends a maximum size of 3000 KB for better uploading. When you identify a maximum size, users cannot upload images larger than this set size. If this value is blank, the system does not enforce an upload limit.

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Gender Identity

Field or Control	Description
Enable Gender Identity	Select to track gender information such as gender (current sex), birth sex, pronouns, sexual orientation, and gender identity for your employees. Doing this does the following: • Allows you to rename the **Gender** field label across the HCM system using the Gender Configuration Page. For example, you can use **Current Sex** as the label instead. • The PeopleSoft Human Resources Administer Workforce: Biographical Details Page of Personal Data provides new fields for HR administrators to insert gender identification details for a person. • The Fluid PeopleSoft eProfile: Personal Details Dashboard allows employees to access the Gender Identity tile and pages to view and, if configured to allow self identification, submit updated gender details. • Provides the *Gender Identity Changes* approval transaction type so managers can access the PeopleSoft eProfile Manager Desktop: Pending Approvals - Gender Identity Change Page to approve gender identify information. Upon approval, this information will update Personal Data. • Allows you to configure the Fluid Company Directory to display a person's pronouns (see the PeopleSoft Human Resources Administer Workforce: Company Directory Profile Page Layout). 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 For more information on recording gender identity information for your employees, see Understanding Gender Identity Tracking.

Guided Self Service

As delivered, PeopleSoft HCM allows a manager to initiate one job transaction request at a time per employee. When a transaction is in progress, such as a job promotion that is pending approval, the manager cannot submit another request for that employee until the promotion request is resolved.

Use this section to grant managers the ability to create and submit multiple Job Data transaction requests for an employee.

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Field or Control	Description
Allow Multiple Transactions for Employee	Select this check box to allow a manager to initiate multiple job transaction requests for an employee. Selecting this option will enable it globally for all guided self-service transactions. It will also do the following on the PeopleSoft eProfile Manager Desktop: <Transaction Name> - Find Team Member Page for Selecting Employees: • Display a message above the **Team Members** grid stating that you cannot proceed with a new transaction request when one is in progress for an employee. • Display the **Pending Transaction** field that indicates what transaction is pending for a person, if any. • Issue a warning when the manager selects an employee or group with an employee that has an in progress transaction. Deselect to prevent the manager from initiating a new job request when an employee already has a job data transaction in progress. This is the setting delivered by default. **Note:** When multiple transactions for an employee is disabled in the Installation Table, organizations can still permit it for individual transactions on the PeopleSoft eProfile Manager Desktop: Transaction Configuration - Configuration Page. This allows you to enable the functionality for specific transactions while restricting others. **Important:** When you enable this option globally at the Installation Table level, you *cannot* turn the functionality off at the individual transaction level. Multiple transactions will be allowed for *all* transactions and effective dates. Oracle recommends that you do *NOT* enable multiple transactions at the global (Installation Table) level.

For more detailed information on enabling multiple transaction for an employee, see the "**Allowing Multiple Guided Self Service Transactions for an Employee**" subtopic under the PeopleSoft eProfile Manager Desktop: Understanding Guided Self-Service Transactions discussion.

Recognition

Field or Control	Description
Enable Recognition	Select to provide managers and employees the ability to give kudos to (and receive kudos from) individuals in the organization for their accomplishments. See Understanding Recognition.

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Field or Control	Description
Enable Comments	Select to allow recognition users to decide if their posts support comments. This check box becomes editable if the **Enable Recognition** option is selected. When selected, the system displays the **Allow comments on the post** option on the New Recognition Page. When cleared, the **Allow comments on the post** option is not shown; comment is not supported.

Digital Badges

Field or Control	Description
Enable Digital Badges	Select to allow managers and administrators to award employees with digital badges in recognition of their achievements. See Understanding Digital Badges.

Notification Composer

> **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 Enterprise Components: Understanding Notification Composer.

Field or Control	Description
Enable Notification Composer	Select to enable the notification composer which allows you to create new notifications and manage your existing notifications.

User Email Options(s) in My Preferences

Use this section to specify how emails should appear in My Preferences: as listed in PeopleTools User Profiles or as indicated in Personal Details.

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Emergency Contact

Field or Control	Description
Enable Emergency Type Selection	Select to allow the employee to designate emergency contacts for critical situations. See Emergency Contact Detail-page for more information.

Related Topics

- Setting Up Primary Permission List Preferences
  To set up primary permission list preferences, use the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).
- PeopleSoft Human Resources Manage Positions: Creating Positions
- Person or Position Structure
  PeopleSoft HCM enables you to structure or drive your PeopleSoft Human Resources system by person or by position. Before you set up information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.
- Understanding Currency
  If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.
- PeopleSoft Human Resources Manage Base Compensation and Budgeting

Product Specific Page

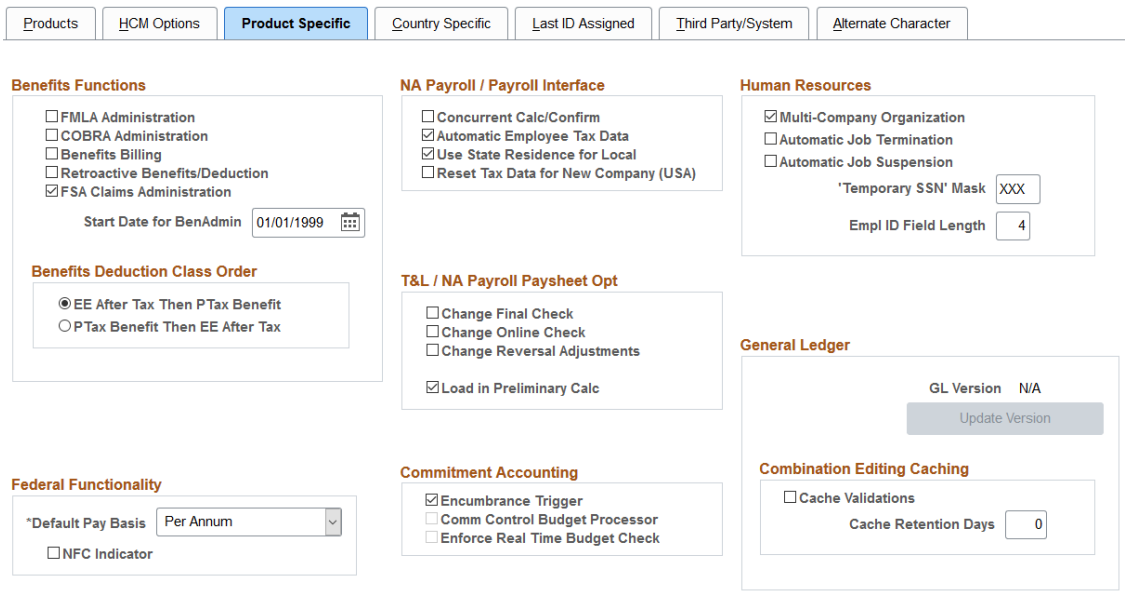
Use the Product Specific page (INSTALLATION_TBL1A) to enter product- and industry-specific installation information.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Product Specific**

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

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Benefits Functions

Field or Control	Description
FMLA Administration (Family Medical Leave Act), **COBRA Administration** (Consolidated Omnibus Budget Reconciliation Act administration), **Benefits Billing**, **Retroactive Benefits** / **Deductions,** and **FSA Claims Administration**	Select to activate these different types of benefits functionality.
Start Date for BenAdmin (start date for Benefits Administration)	Enter the start date in PeopleSoft date format: MM/DD/YYYY.

Benefits Deductions Class Order

When the 415(c) limit is met, the deduction classes are limited in the following order: Employee Before-tax contribution, Employee After-tax contribution, Ptax Benefit (Employer Before tax Match), & then the Nontaxable Benefit (After Tax Employer Match). The user can change the deduction class order when the limit is met by selecting PTax Benefit then EE After Tax — Employer Before Tax Contribution is limited first then the Employee After Tax Contribution. The deduction class order will then be Employee Before-tax contribution, Ptax Benefit (Employer Before tax Match), Employee After-tax contribution & then the Nontaxable Benefit (After Tax Employer Match).

(USF) Federal Functionality

Field or Control	Description
Default Pay Basis	For the **Default Pay Basis,** select the value to use for quoting and reporting salaries. This field is required if you selected Federal on the Products page.
NFC Indicator	Select this check box to expose National Finance Center (NFC) fields on impacted components and run the associated PeopleCode logic.

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NA Payroll / Payroll Interface (North American Payroll and Payroll Interface)

Field or Control	Description
Concurrent Calc/Confirm (concurrent calculation and confirmation)	Select to enable the system to run a calculation and confirmation at the same time. It is possible for a person to be in two concurrent runs; this could cause a deadlock situation where the process ends abnormally.
Automatic Employee Tax Data	Select to enable the system to create employee federal, state, and provincial tax records automatically when one of the following criteria is met: • You hire an employee. • An employee has a job change requiring a new work tax location. • You add a concurrent job that requires a new work tax location for an employee. • You hire an employee from the Applicant Tracking System. • A person transfers to a new company.
(USA) **Use State Residence for Local**	This field is automatically selected when you select the **Automatic Employee Tax Data** option. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, clear this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck. See PeopleSoft Payroll for North America: Understanding Resident Locality in Local Tax Data.
Reset Tax Data for New Company (USA)	Select to enable the system to reset employee federal, state, and local tax records to default values in new companies when employees are transferred to or rehired in different companies. Clear this field for the system to copy employee federal, state, and local tax records from current to new companies when employees are transferred to or rehired in different companies. This option is not available if the product modifications for user-configurable Automatic Employee Tax Data options are not applied. See PeopleSoft Payroll for North America: Understanding Employee Tax Data Reset.

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T&L/NA Payroll Paysheet Opt (Time and Labor and Payroll for North America paysheet options)

Field or Control	Description
Change Final Check, Change Online Check, and **Change Reversal Adjustments**	Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.
Load in Preliminary Calc (load in preliminary calculation)	The Pay Calculation process uses the value of the Load in Preliminary Calc field to determine whether to load new available time (additional time that was worked before the job change but not previously loaded on paysheets): • If you select this check box, the system loads all valid available time to the new paysheets, including new available time. • If you deselect this check box, the process does not load any new available time to paysheets, except as noted below. **Note:** If an employee had a Job data change that caused paysheets to be rebuilt, the Pay Calculation process attempts to reload all valid time and rejects time that is no longer valid as a result of the Job data change. This is true regardless of the setting of the Load in Preliminary Calc field. In this case, the process first rejects all previously loaded time, then it reloads the available time. If **Load in Preliminary Calc** is not selected, some new time might be loaded, but only for the employee being processed due to the Job data change.

AP Invoice Prefix (accounts payable invoice prefix)

Field or Control	Description
AP Inv. Prefix (accounts payable invoice prefix)	(Optional) Enter a prefix to be used for accounts payable invoices that are generated through HCM.

Commitment Accounting

Field or Control	Description
Encumbrance Trigger	Select to enable pre-encumbrance and encumbrance triggers to be processed from various online events. Each event causes the system write a record to the Encumbrance Trigger table (ENCUMB_TRIGGER), which is then used as input for the Batch Encumbrance Calculation process (ENC_CALC).

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Field or Control	Description
Comm Control Budget Processor (commitment control budget processor)	Select to enable real-time budget checking using the Commitment Control Budget Processor in PeopleSoft Financials. Real-time budget checking verifies available funding for job data changes or position data changes that generate encumbrances and pre-encumbrances. The Commitment Control Budget Processor is a PeopleSoft Financials Application Engine program that checks your budget for available funds This check box is available if you have configured the necessary integration with PeopleSoft Financials 9.0 or higher, but you must separately confirm that the necessary ledgers have been set up. If the ledgers have not been set up, the Commitment Control Budget Processor response to all budget checks is that the charges are invalid. **Note:** Real-time budget checking must be additionally activated at the department level. See Comm. Acctg. and EG Page.
Enforce Real Time Budget Check	This setting is applicable only to departments with real time budget checking configured in department table setup. Select to prevent users from saving certain critical job data and position data changes when real-time budget checking shows that there are not sufficient budgeted funds for the change. Critical changes in the Job Data component include hiring, rehiring, and adding a concurrent job. Critical changes in the Position Data component include creating a position, increasing the head count for a position, changing a position from inactive to active, and changing the Pre-Encumbrance Indicator for a position from *None* or *Requisition* to *Immediate*. Any other changes that affect encumbrance and pre-encumbrance calculations are considered non-critical. If you select this check box, users must address the budget errors before the system will allow the critical job data or position data changes to be saved. If you do not select this check box, users can choose to ignore the budget errors for critical changes. **Note:** Users can always ignore budget check errors related to non-critical job data and position data changes.

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Human Resources

Field or Control	Description
Multi-Company Organization	Select if your organization comprises more than one company. Select if you use PeopleSoft Pension Administration, because you set up companies specifically to house your pension payees.
Automatic Job Termination	Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.
Automatic Job Suspension	Select to activate substantive job suspension for workers working in temporary assignments where the substantive job requires suspension for the duration of the assignments.
'Temporary SSN' Mask (temporary Social Security number mask)	Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.
Empl ID Field Length	Enter the number of characters to be used for employee IDs.

General Ledger

Field or Control	Description
GL Version	Displays the version of PeopleSoft General Ledger that is interfacing with PeopleSoft HCM. Click the Update Version button if you change versions. The system will automatically update the GL Version. **Note:** Full ChartField functionality is available only when you use PeopleSoft General Ledger 8.4 or higher. Real-time budget checking is available only when you use PeopleSoft Financials 9.0 or higher with Commitment Control.
Update Version	Click to test the integration with PeopleSoft Financials and display the latest version of Financials.
Cache Validations	Select to cache the results of your validations. This improves performance by enabling you to cached validations.
Cache Retention Days	Enter the number of days to store validation results. The system will delete anything in the cache older than this.

Related Topics

- PeopleSoft Benefits Administration: Benefit Information Automation

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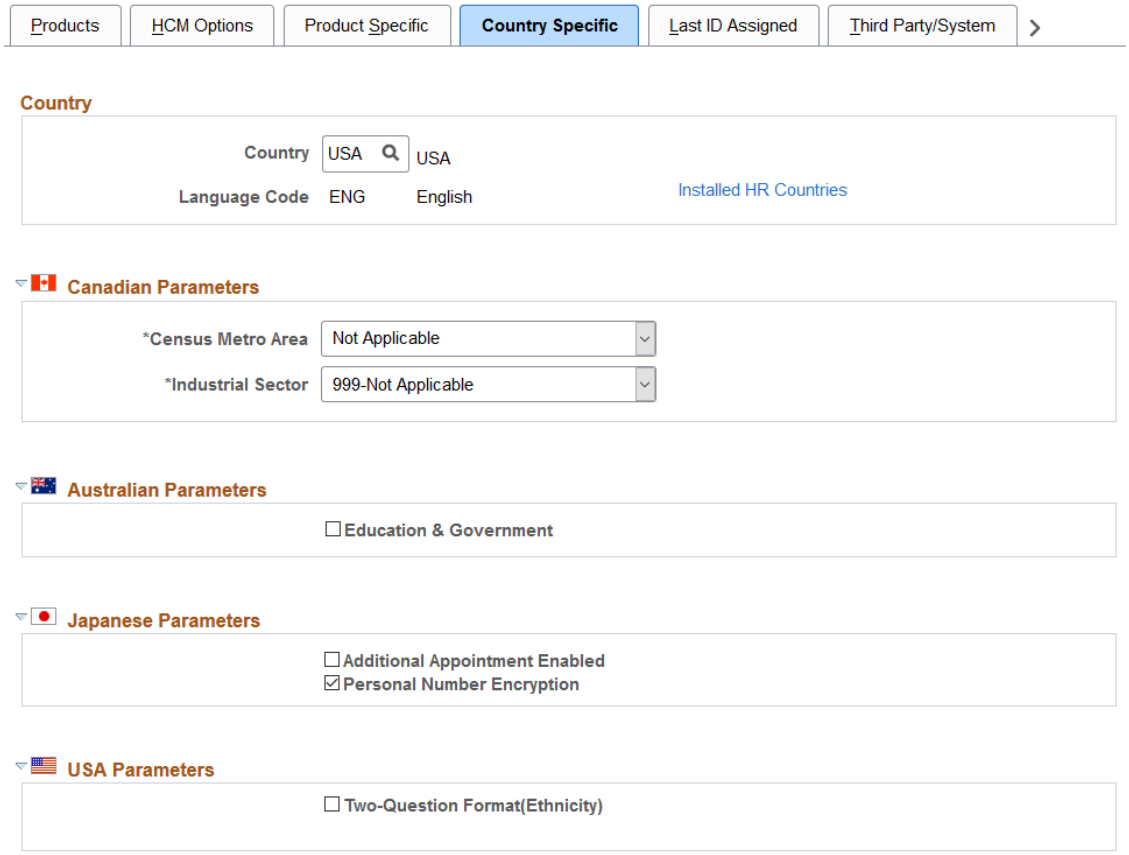
Country Specific Page

Use the Country Specific page (INSTALLATION_TBL3) to enter country-specific installation information.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Country Specific**

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



Country

Field or Control	Description
Country	Select a country for the system to enter as a default value.
Language Code	The system displays the default base language for the database.
Installed HR Countries	Select this link to go to the Installed HR Countries page, where you can select which local country functionality is installed in the system.

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(CAN) Canadian Parameters

Field or Control	Description
Census Metro Area (census metropolitan area)	Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Org Defaults by Permission Lst component. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

See Setting Up Primary Permission List Preferences.

Field or Control	Description
Industrial Sector	Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Org Defaults by Permission Lst component. This value is used as the default for the Canadian Industrial Sector field in the Department component; and it identifies the industrial sector with which people in a given department are associated. This field is required.

See Setting Up Primary Permission List Preferences.

See Maintaining Departments.

(AUS) Australian Parameters

Field or Control	Description
Education & Government	Select this check box for Australian public service organizations.

(JPN) Japanese Parameters

Field or Control	Description
Additional Appointment Enabled	Select if you will be implementing Additional Appointment tracking *(Kenmu).* Selecting this check box activates functionality to create a dummy additional appointment job code when you create a new business unit. See PeopleSoft Human Resources Administer Workforce: Understanding Additional Appointments.

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(USA) USA Parameters

Field or Control	Description
Two-Question Format (Ethnicity)	Select this check box if you want to collect U.S. employee ethnicity data using the two-question format defined in the U.S. Office of Management and Budget's (OMB) 1997 Standards for Maintaining, Collecting and Presenting Federal Data on Race and Ethnicity. When this check box is selected, U.S. employees who access the self-service Ethnic Groups page see a version of the page that uses the two-question format. When this check box is deselected, U.S. employees see the same version of the self-service Ethnic Groups page that non-U.S. employees see. This general-purpose version of the page does not include any questions. Instead, employees specify one or more ethnicities in an Ethnic Groups grid.

Installed HR Countries Page

Use the Installed HR Countries page (INSTALLATION_SEC) to specify which local country functionality to activate for users in PeopleSoft Human Resources.

Navigation:

Click the **Installed HR Countries** link on the Installation Table - Country Specific page.

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



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The system displays a flag for each country that has special local functionality in PeopleSoft Human Resources:

- Select a check box to activate local functionality for that country. Users who have security access can see and work with that country's local functionality.
- Deselect a check box to hide that local functionality from your users.

If the check box for a country is selected on this page, but you don't grant country access to the users' primary permission list on the Setup Global Security page (SCRTY_TBL_GBL), users will not see local country functionality.

See Setting Up Security for Local Functionality.

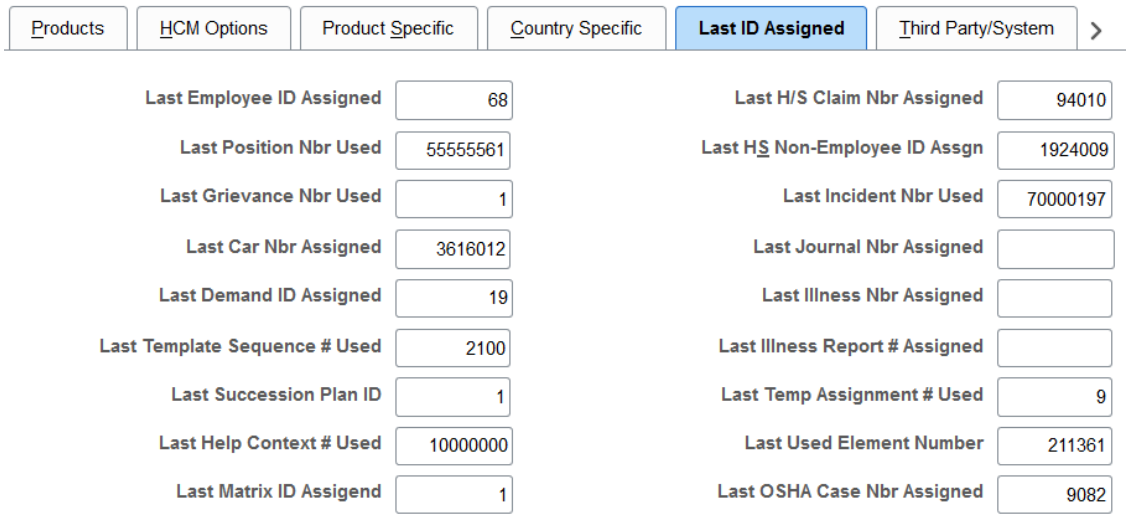
Last ID Assigned Page

Use the Last ID Assigned page (INSTALLATION_TBL2) to specify the number that the system uses to start assigning numbers.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Last ID Assigned**

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



In PeopleSoft HCM, there are several fields where you can either enter numbers manually or let the system assign them.

The following table lists auto-numbering fields.

Field	Application	Business Process
Last Employee ID Assigned	PeopleSoft Human Resources	Administer Workforce Recruiting Workforce
Last Position Nbr Used	PeopleSoft Human Resources	Manage Positions Plan Successions
Last Grievance Nbr Used	PeopleSoft Human Resources	Manage Labor Administration

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Field	Application	Business Process
Last Car Nbr Assigned	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training
Last Template Sequence # Used	PeopleSoft Human Resources	Administer Workforce
Last Succession Plan ID	PeopleSoft Human Resources	Plan Successions
Last Help Context # Used	PeopleSoft HCM	Customizing Windows Online Help
Last H/S Claim Nbr Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last H/S Non—Employee ID Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last Incident Nbr Used	PeopleSoft Human Resources	Monitor Health and Safety
Last Journal Nbr Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Illness Nbr Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness Report # Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Profiles
Last OSHA Case Nbr Assigned	PeopleSoft Human Resources	Monitor Health and Safety Meet Regulatory Requirements

To let the system assign numbers for the fields on this page, enter the last number that you used in the field. The system increases that number by one when it assigns a new number. The system updates the Installation Table every time it assigns a number. You can override this value as necessary.

> **Note**
>
> To avoid maintaining two different sets of numbers, either always assign numbers manually or always let the system do it.

In addition to the last IDs that you set here, additional product-specific installation tables might enable you to view or set last IDs specific to that product. Navigate to **Set Up HCM,**, and then **Install**, and then **Product Specific** to access product-specific installation tables.

ID Considerations

When you convert ID data to PeopleSoft Human Resources from another system, enter the highest number that was used in your previous system so that you don't duplicate IDs. If the last ID you assigned in your previous system was 1000, enter *1000* in the **Last Employee ID Assigned** field. When you add a person in PeopleSoft Human Resources, the system assigns an ID of *1001* and updates the Last Employee ID Assigned field accordingly.

To always enter IDs manually, enter *9999999999* (ten 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

If you use Social Security or insurance numbers as IDs, change the formatting for the employee ID field using PeopleSoft Application Designer.

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Zero-filled Numbers

To make data entry faster and more accurate on several pages when you enter a number that the system has assigned, the system enters zeros before the number. For example, when you enter *4,* you see *00000004,* a total of 8 characters per number. This occurs in the following fields:

- Job Opening
- Requirements Search
- Grievance
- Incident
- Claim
- Position

> **Note**
>
> If you have already assigned numbers that aren't zero-filled, change their numbering so that the system can accurately track them when you convert the data to PeopleSoft Human Resources.
>
> For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

See *PeopleTools: Application Designer Developer's Guide*

Third Party/System Page

Use the Third Party/System page (INSTALLATION_TBL4) to set the criteria for gathering statistics and activate the SQR security for PeopleSoft HCM.

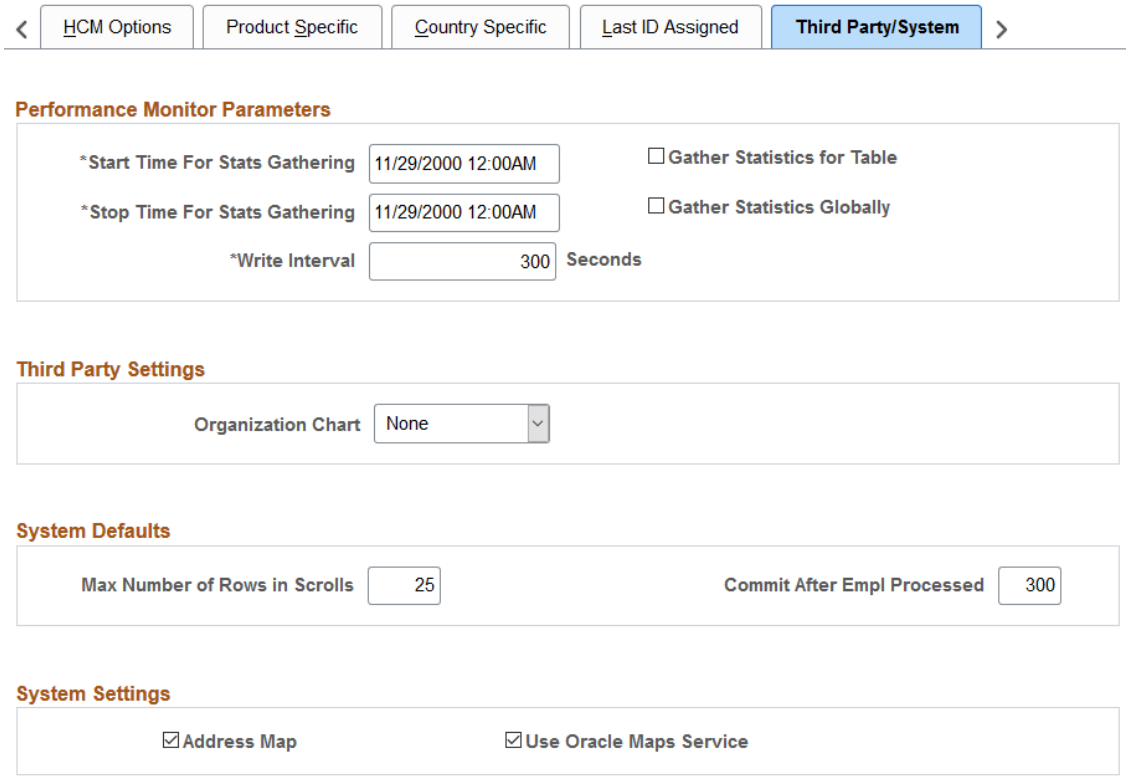
Define parameters for using third-party applications such as Visio.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Third Party/System**

This example illustrates the fields and controls on the Third Party/System page. You can find definitions for the fields and controls later on this page.

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Performance Monitor Parameters

Field or Control	Description
Start Time For Stats Gathering (start time for statistics gathering) and **Stop Time For Stats Gathering** (stop time for statistics gathering)	Enter the date and time of the start and stop.
Gather Statistics for Table	Select to gather statistics locally.
Gather Statistics Globally	Select to gather statistics globally.
Write Interval	Enter the number of seconds for gathering the statistics.

Third Party Settings

Field or Control	Description
Organization Chart	Enter the type of third-party program you use to create organizational charts with your human resources data.

System Defaults

Field or Control	Description
Max Number of Rows in Scrolls (maximum number of rows in scrolls)	Enter the maximum number of rows in a scroll-controlled data box for third-party systems.

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Field or Control	Description
Commit After Empl Processed (commit after employee processed)	Enter the maximum number of people for the system to process before committing. This setting is used only for PeopleSoft Payroll for North America processing.

System Settings

Field or Control	Description
Address Map	Select to include a map of an address.
Use Oracle Maps Service	Select this check box when you have licensed the Oracle Maps Cloud Service for PeopleSoft to enable applications to use eLocation services. **Note:** The map display functionality shown in the HCM features requires a separate license to Oracle Maps Cloud Service for PeopleSoft. For details see the Licensing Information User Manual (LIUM).

Related Topics

- Understanding Organization Charts
  PeopleSoft Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. To build organization charts, you decide whether to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees, then run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Formatting options in the Visio Organization Charting Wizard enable you to easily create detailed charts of only one department or your entire organization.

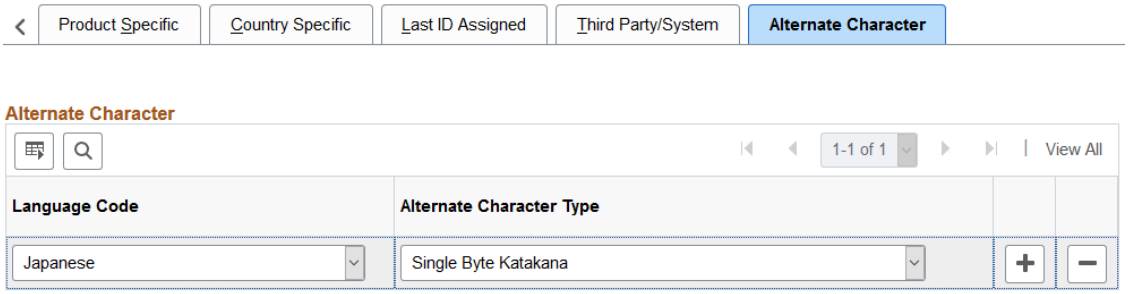
Alternate Character Page

Use the Alternate Character page (ALT_CHAR_TBL) to specify the language code and alternate character type.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Alternate Character**

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



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> **Note**
>
> Because you are setting the alternate character code on the Installation Table, the setting affects your entire HCM application configuration. Make sure that you account for all language codes for your installation.

If you don't specify an alternate character type for a language code that a user is working with, and the user tries to enter characters in an **Alternate Character** field, a warning message appears.

If you specify an alternate character type for a language code, and a user enters any other character type in an **Alternate Character** field, a warning message appears.

> **Note**
>
> You can ignore the warning message and enter the data in another character set, but problems can occur when data is sorted in multiple alternate character sets.

Setting Up HCM Options on the PeopleTools Options Page

To set up HCM options on the PeopleTools Options page, use the PeopleTools Options component (PSOPTIONS).

This topic discusses how to set up HCM options on the PeopleTools Options page.

You use the PeopleTools Options page to set a variety of values that are related to:

- Multi-company organizations.
- Organizations that conduct business using more than one currency.
- Multiple jobs functionality.

Access the PeopleTools Options page on the **PeopleTools**, and then **Utilities**, and then **Administration** menu.

See *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities", Using Administration Utilities.

Select the following check boxes, as applicable, to activate these kinds of functionality:

Field or Control	Description
Multi-Company Organization	Select if your organization comprises more than one company or if you use PeopleSoft Pension Administration to set up companies specifically to house your pension payees.

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Field or Control	Description
Multi-Currency	Select to enter data in more than one currency. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and Euros. If you select *Multi-Currency*, the system displays a Currency Code field on pages where amount fields appear. **Note:** *Multi-Currency* doesn't affect PeopleSoft Global Payroll, which has its own multiple currency functionality.
Multiple Jobs Allowed	PeopleSoft HCM requires that you leave this option selected. Multiple job functionality must be active so that PeopleSoft Human Resources can manage data for people with whom you have different types of organizational relationships (employee, contingent worker, and person of interest).

See *PeopleTools: Security Administration*.

Administering Country Codes

To administer country codes, use the Country Table (COUNTRY_TABLE), Country Address Format Table (ADDRESS_TABLE), the Country Table – HR (HR_COUNTRY_TABLE), and the State/Province (STATE_DEFN) components.

These topics provide an overview of country codes and discuss administering country codes.

This video provides an overview of configuring addresses and the global dynamic address:

Video: Image Highlights, PeopleSoft HCM Update Image 39: Enhanced Address Configuration

Pages Used to Administer Country Codes

Page Name	Definition Name	Usage
Country Table Page	COUNTRY_DEFN	View or update country descriptions.
Entry and Validation Page	ADDR_FORMAT_TABLE	Identify address fields and validation for a country.
Display and Print Page	ADDR_FORMAT_DISP	Specify the address format for the country that is selected from the Country Table.
Search Values Page	EO_ADDR_VALIDAT	Make corrections, deletions, or incremental additions to specify the valid address values for the country.
Country Table for HR Page	HR_COUNTRY_DEFN	Specify additional information about a country for HCM reporting purposes.

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Page Name	Definition Name	Usage
State/Province Page	STATE_DEFN	Add a state, province or equivalent entity for the country that is selected from the Country Table.
Country Table Report - Run Control Page	PRCSRUNCNTL	Run the Country Table report (PER708) that prints a list all country character codes.

Understanding Country Codes

On many pages in PeopleSoft Human Resources, a country appears as part of the address for a person, a company, or an office. Countries are represented as codes, such as CAN for Canada, and they are listed in the Country Table component. In the Country field on any page, the system displays a default country code, which you can change. The Org Defaults by Permission Lst component and the Business Unit Options Defaults component (BUS_UNIT_OPT_HR) can affect this default code. You can define the information that users should capture for addresses in specific countries using the Country Address Format Table component (ADDRESS_TABLE).

You need codes for all the countries where your organization does business and where the people in your system live. The Country Table page (COUNTRY_DEFN) includes an extensive list of predefined countries and codes, and the Address Format Table component (ADDRESS_TABLE) maintains the address field layout for each country. These pages are updated with each version of PeopleSoft Human Resources according to the countries that are recognized by the International Standards Organization (ISO).

Formatting Addresses for a Country

In some cases, you may need to add a new country code or modify an existing country address format. For these instances, PeopleSoft HCM delivers the global dynamic *EO_ADDR_GBL_SEC* address page to support global address formatting. This functionality enables you take control over how addresses should display on a user page by enabling the administrator to:

- Configure the address fields, and their display order, as they should appear on the data-entry pages.
- Add or remove an address field from the address.
- Configure an address field, as needed.
- Apply cross validation logic, if additional validation is required.

Country Table Page

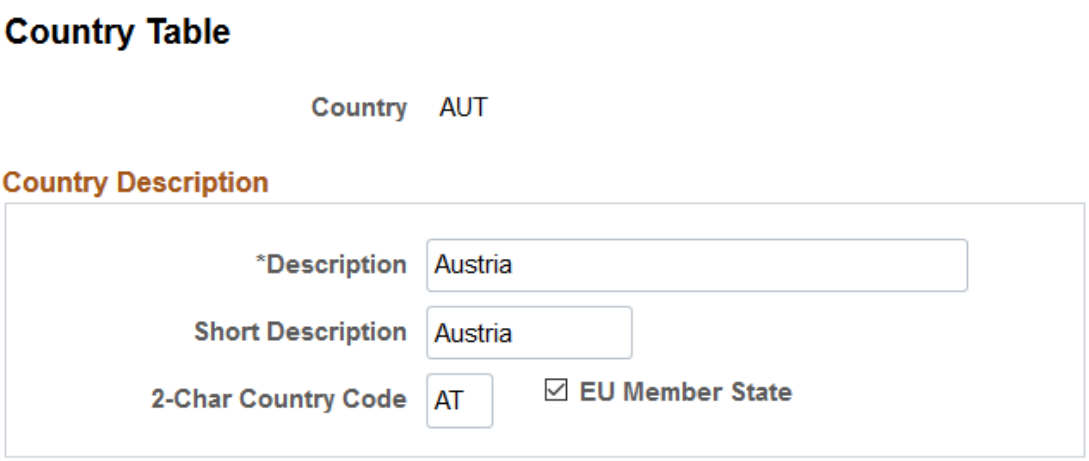
Use the Country Table page (COUNTRY_DEFN) to view or update country descriptions.

Navigation:

Set Up HCM, and then **Install**, and then **Country Table**, and then **Country Table**

This example illustrates the fields and controls on the Country Table page.

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Field or Control	Description
2-Char Country Code (two-character country code)	Enter the code that the U.S. government assigned to the country, if applicable.
EU Member State (European Union member state)	Select if this is an EU member state. This field is for your reference only and doesn't impact system processing or reporting.

Entry and Validation Page

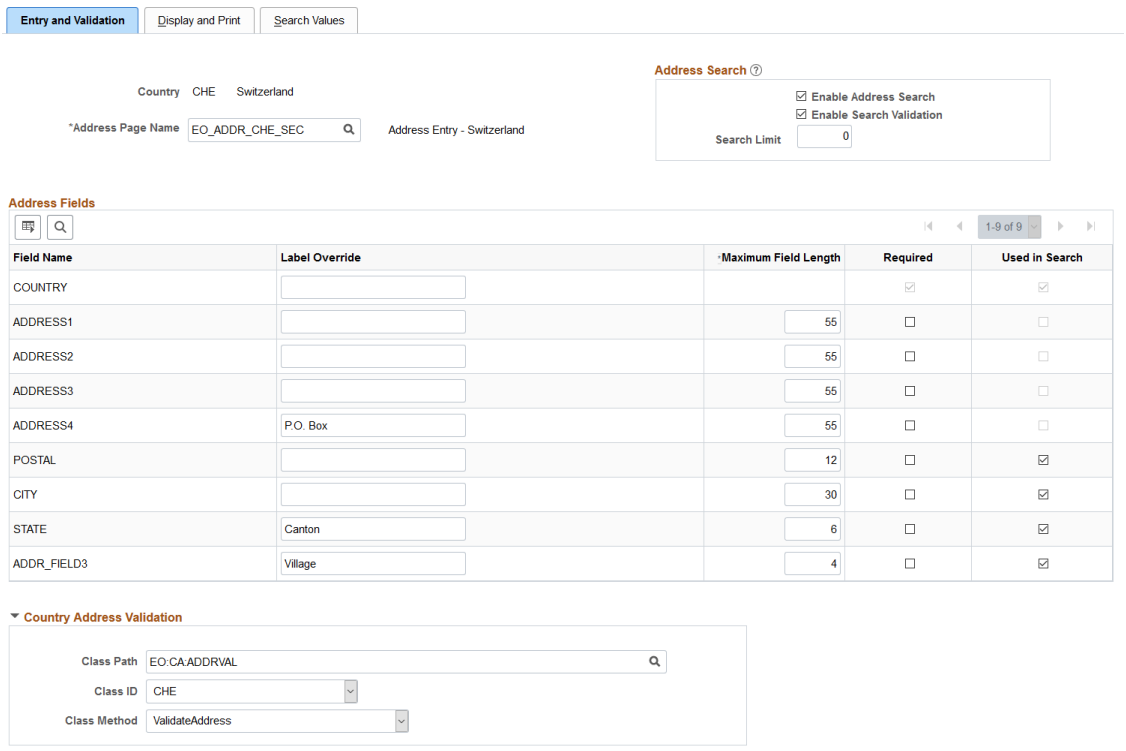
Use the Entry and Validation page (ADDR_FORMAT_TABLE) to set address fields and validation for a country.

Navigation:

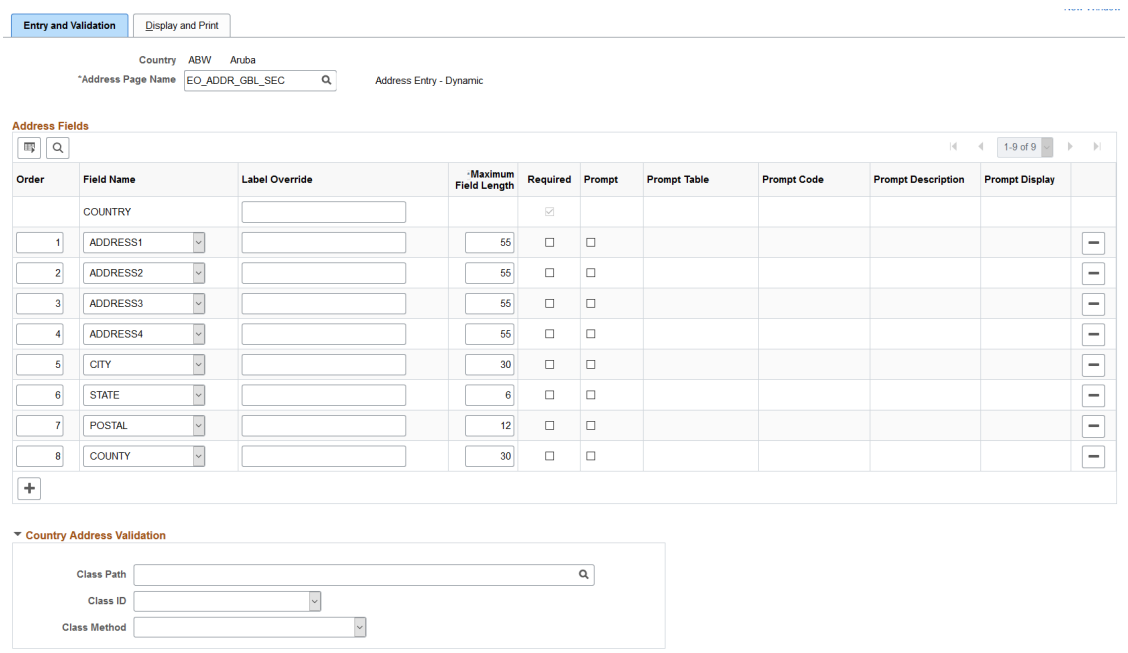
Set Up HCM, and then **Install**, and then **Country Address Format Table**, and then **Entry and Validation**

This example illustrates the fields and controls on the Entry and Validation page when using the standard delivered address page for a country.

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This example illustrates the fields and controls on the Entry and Validation page when using the dynamic global address page EO_ADDR_GBL_SEC.



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Field or Control	Description
Address Page Name	Select an address page from the list of available options. The system will display the list of fields on that page in the Address Fields group box. To use the global address formatting feature, enter the *EO_ADDR_GBL_SEC* (Address Entry - Dynamic) page to enable additional field options and add or delete fields from the address display. **Note:** When using a country specific page (for example, *EO_ADDR_ARG_SEC*) or the Address Entry - Default page name (i.e.- *EO_ADDR_DFT_SEC*), you cannot add or remove the fields on this page.

Address Search

This group box is available when the country is configured to use address searching. As delivered, the page displays this group box for four country address pages: Japan, Switzerland, Italy and Netherlands.

> **Note**
>
> To enable the use of address search and validation for other countries, you need to load values into the EO_ADDR_VALIDAT table for the country through a batch utility or with SQL.

Field or Control	Description
Enable Address Search	Select to enable users to search for a valid value. Select this check box to enable the **Used in Search** column and the Search Values Page. The system provides this check box deselected by default.
Enable Search Validation	This check box is available when **Enable Address Search** is selected. Select to have addresses entered by users checked against the address values on the Search Values Page. When no match is found, the system will display a warning to the user.
Search Limit	Enter a numeric value to limit the number of search results.

Address Fields

These fields are available for all address page types, unless otherwise indicated.

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Field or Control	Description
Field Name	Displays the address fields available in the PeopleSoft HCM based on the **Address Page Name** value you selected. **Note:** When you add a new country, the address fields default to those of the *EO_ADDR_DFT_SEC* page, even though the Address Page Name defaults to *EO_ADDR_GBL_SEC*.
Label Override	Enter a different label to override the displayed **Field Name**, if required for this country. For example, you some countries may use the term Province instead of State.
Maximum Field Length	(Fluid) Enter a number to identify a field length on the Fluid pages. The field length is provided by default from the database level, which you can override and limit the visible length at runtime by styling. **Note:** Updating the maximum field length here does not update the field length for the classic pages. If the user enters more characters than the specified number, an error message is triggered, both in fluid and classic.
Required	Select if a field is required before a user can save the entry.
Used in Search	This option is available when the **Enable Address Search** check box is selected. Select to have the system to use this field as a prompt when searching for a valid address.

Address Fields (Dynamic Address Page for Editing)

These additional fields are available when you use the *EO_ADDR_GBL_SEC* (Address Entry - Dynamic) address page.

Field or Control	Description
Order	Enter the default order, lowest to highest, the address fields should appear on the data entry pages. **Note:** The position of the Country field is fixed, since you need to select the country first to determined the other address fields.
Prompt	Select the Prompt check box to enable the prompt fields on this page. This will allow you to re-purpose the field by defining a prompt table.
Prompt Table, **Prompt Code**, and **Prompt Description**	Select the prompt keys which match the address field.
Prompt Display	Select if the field should be a *Drop Down* or a *Prompt Table*.

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Country Address Validation

Use this collapsible section to enable country-specific address validation. PeopleSoft HCM delivers validation for 23 countries: Argentina, Australia, Belgium, Brazil, Canada, China, Czech Republic, France, Germany, Greece, Italy, Japan, Mexico, Netherlands, New Zealand, Poland, Portugal, Thailand, South Korea, Spain, Switzerland, United Kingdom and United States.

> **Note**
>
> You should only need to modify this information if the existing validation is not sufficient.

Field or Control	Description
Class Path	Select a path that uses a specific class within the root package. The system delivers the classes in the *EO:CA:ADDRVAL* application package, but you can add formatting or validation by writing extensions of the new classes for specific address formats.
Class ID	Enter the name of the application class that contains the method to be invoked.
Class Method	Enter the name of the method to be invoked. The framework uses the *ValidateAddress* method for the delivered classes.

Display and Print Page

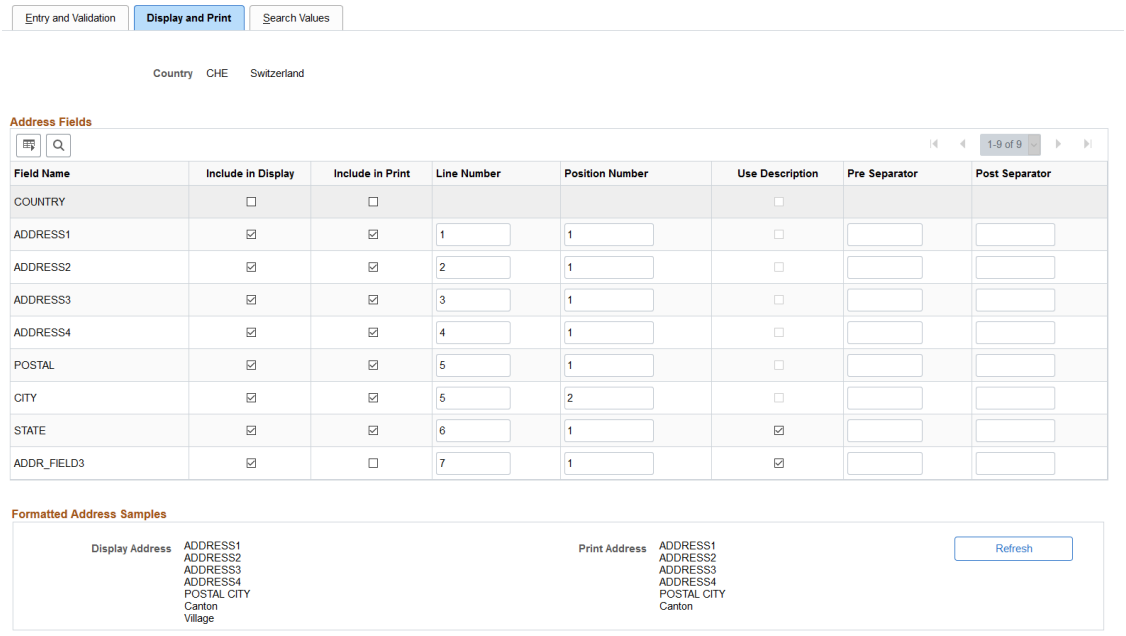
Use the Display and Print page (ADDR_FORMAT_DISP) to specify the address format for the country that is selected from the Country Table.

Navigation:

Set Up HCM, and then **Install**, and then **Country Address Format Table**, and then **Display and Print**

This example illustrates the fields and controls on the Display and Print page.

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Address Fields

Field or Control	Description
Field Name	Displays the address fields available in the PeopleSoft HCM.
Include in Display	Select to have the system include this field when an address appears in read-only mode. Deselect this check box for specific fields if your organization wants to display addresses in a format that is different from how addresses appear during data entry.
Include in Print	Select to have the system print this field whenever an address in this country will be printed.
Line Number	Enter the line on the page on which this field should appear.
Position Number	Indicate this field's position in the selected line.
Use Description	Select to have the system display a full description for this field instead of the code, where applicable.
Pre Separator and **Post Separator**	Enter separator characters for the address elements if applicable (for example and em dash).

Formatted Address Samples

This section shows how the address will be displayed online and in print format with the current settings.

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Field or Control	Description
Refresh button	Click to update the samples to the current configuration. **Note:** The samples use the field's description (e.g. *State*) if the **Use Description** check box is selected. Otherwise, it uses the field name (e.g. *STATE*).

Search Values Page

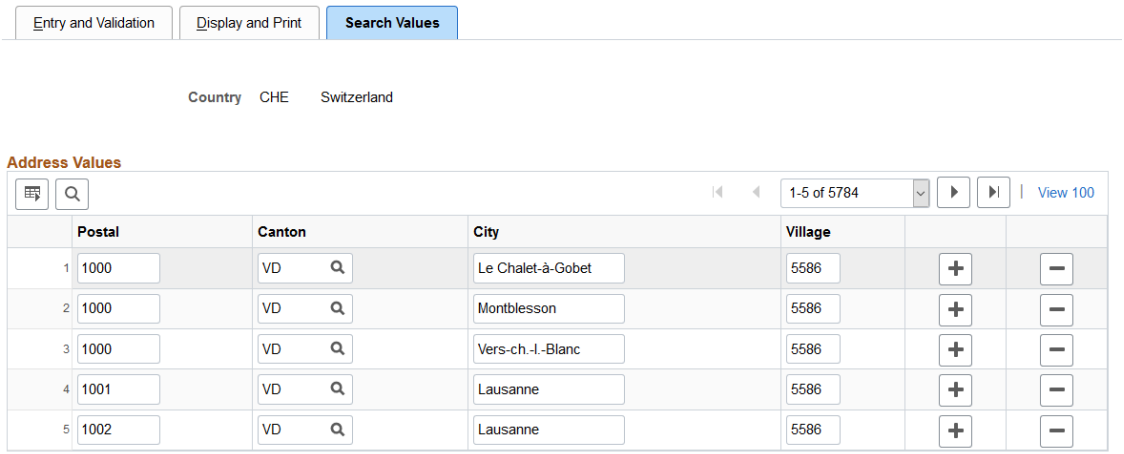
Use the Search Values page (EO_ADDR_VALIDAT) to make corrections, deletions, or incremental additions to specify the valid address values for the country.

> **Note**
>
> This page is available for those countries that are enabled for search validation. As delivered, this page is populated for four countries: Japan, Switzerland, Italy and Netherlands.

Navigation:

Set Up HCM, and then **Install**, and then **Country Address Format Table**, and then **Search Values**

This example illustrates the fields and controls on the Search Values page.



Addresses Values

This page stores state/province codes with corresponding cities, as entered on the State/Province page. When you select **Enable Search Validation** on the Entry and Validation Page, the system checks address entries against the values stored on this page to verify that the search address fields match. You can also use it to add valid combinations of address fields.

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> **Note**
>
> (JPN) Japanese postal data is stored in both the Postal Code Table and this table (EO_ADDR_VALIDAT). To keep this table in sync with the Postal Code Table, you must enter new postal data in the Postal Code Table page. The system will not update the Postal Code Table with values you enter on this page.

Related Topics

- (ITA) Setting Up Italian City Codes
  To set up Italian city codes, use the Load Cities ITA component (RUNCTL_CITYUPDATE).
- Define Postal Codes JPN Page
  Use the Define Postal Codes JPN page (POSTAL_TBL_JPN) to enter information to maintain Japanese postal codes or add data that did not import as expected.

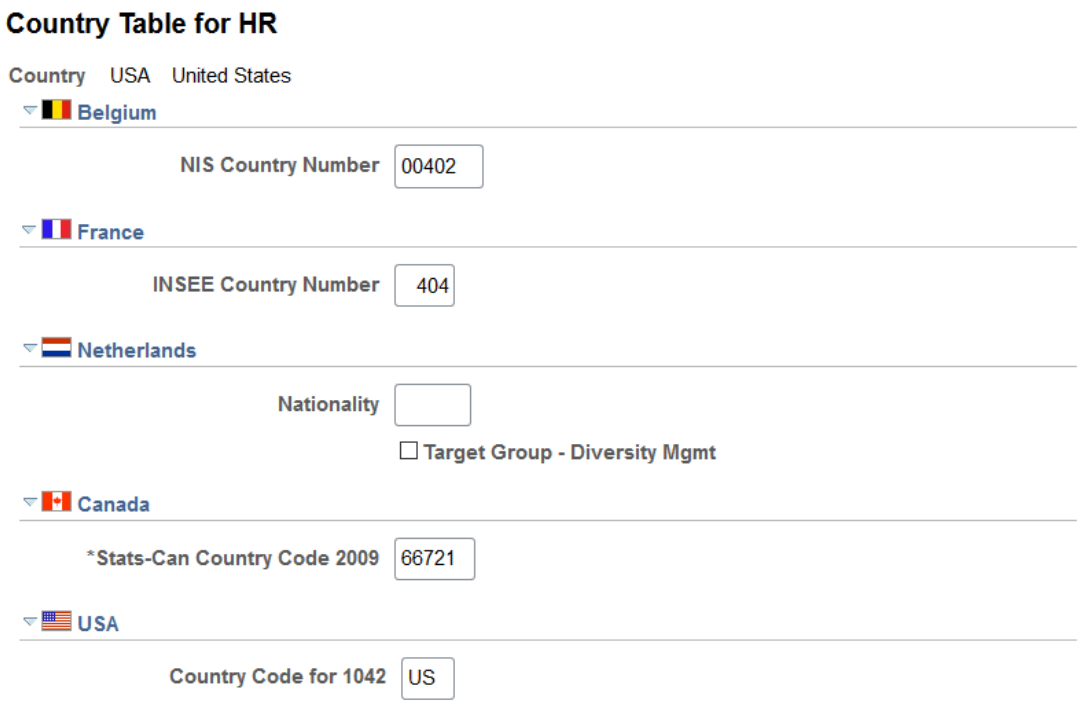
Country Table for HR Page

Use the Country Table for HR page (HR_COUNTRY_DEFN) to specify additional information about a country for HCM reporting purposes.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **Country Table for HR**, and then **Country Table for HR**

This example illustrates the fields and controls on the Country Table for HR page.



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(BEL) Belgium

Field or Control	Description
NIS Country Number (National Institute for Statistics country number)	Enter the NIS Country Number for reporting hires and terminations to the Social Insurance.

(FRA) France

Field or Control	Description
INSEE Country Number (National Institute for Statistical and Economic Studies country number)	INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(NLD) Netherlands

Field or Control	Description
Nationality	Enter the four-digit nationality code for the country. Nationality codes are defined by the Netherlands coding standard (NEN) and are used in wage declarations for the Netherlands. The system uses the Country code specified for an employee on the Citizenship/Passport page to determine which nationality code applies to the employee.
Target Group - Diversity Mgmt (target group - diversity management	Select this check box to identify this country as a target group for diversity reporting purposes in the Netherlands. If you're administering a Dutch workforce, may want to track information on the national origin of an employee. Employee national origin is based on either their birthplace or their parent's birthplace. **Note:** From December 31, 2003 the SAMEN law is no longer a legislative requirement. However, we continue to provide the ability to track employees' national origin to enable you to monitor workforce diversity.

(CAN) Canada

Field or Control	Description
Stats-Can Country Code pre2009	This field stores the Statistics Canada code that was associated with the country before codes were updated in 2009.
Stats-Can Country Code 2009	Enter the Statistics Canada code that is associated with the country as of 2009.

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(USA) USA

Field or Control	Description
Country Code for 1042	(USA) Enter the country code used when reporting wage and tax data to federal and state government agencies in the EFW2 format. (E&G) Enter the country code for nonresident alien processing

State/Province Page

Use the State/Province page (STATE_DEFN) to add a state, province or equivalent entity for the country that is selected from the Country Table.

Navigation:

Set Up HCM, and then **Install**, and then **State/Province**, and then **State/Province**

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



PeopleSoft delivers the State/Province table with all states, provinces, and equivalent geographical entities (such as Dutch communities and French departments) for all supported countries. The codes are based on standard postal codes. PeopleSoft updates this table with each version.

You need these state or province codes for all countries where your organization does business. You use this information in many address fields in the system.

Field or Control	Description
Postal Abbreviation	The state or province code is automatically displayed.
Numeric Code	Enter the numeric code, if applicable. The U.S. federal government assigns a numeric code to each state for reporting purposes. You don't need to enter numeric codes for new Canadian provinces.

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Setting Up Regulatory Regions

To set up regulatory regions, use the Regulatory Region component (REG_REGION).

These topics provide an overview of integration points and discuss how to define regulatory regions.

Page Used to Set Up Regulatory Regions

Page Name	Definition Name	Usage
Regulatory Region Page	REG_REGION	Set up a regulatory region.

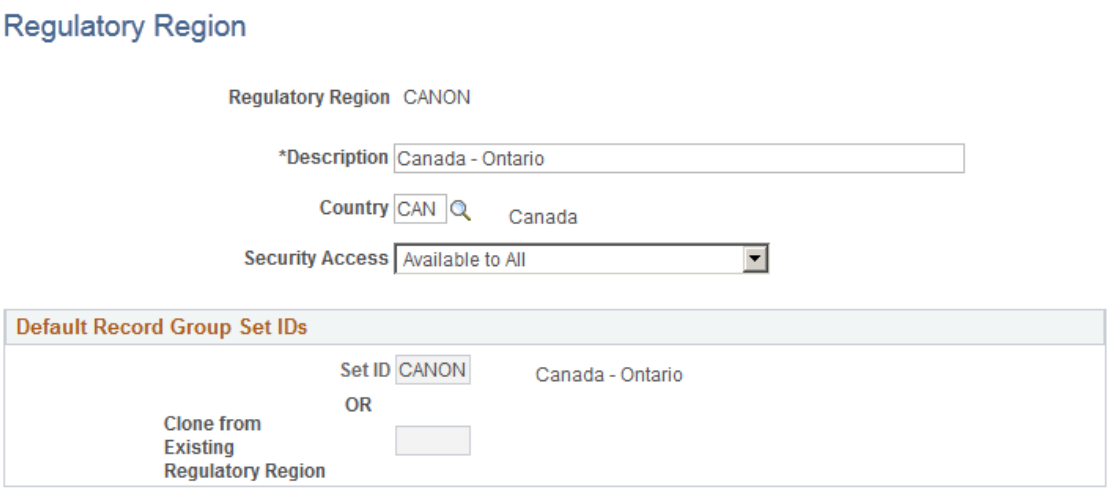
Regulatory Region Page

Use the Regulatory Region page (REG_REGION) to set up a regulatory region.

Navigation:

Set Up HCM, and then **Install**, and then **Regulatory Region**, and then **Regulatory Region**

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



Field or Control	Description
Country	Select a country from the list. When you create a regulatory region, you must specify the country to which the region belongs. This enables country-specific edits even when a state-level or provincial-level region is used in a system transaction. If the country you want to add isn't in the list of values, add that country to the system using the Country Table.

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Field or Control	Description
Security Access	Select a security access level from the list. Because many companies have users working with only one, limited set of regulatory regions, this feature enables you to hide the other regulatory regions from the user. The values are stored on the Translate table. The Regulatory Region prompt edit views use these values to limit the user's Regulatory Region choices to the regions to which the user has access. Values are as follows: • *Available To All:* Users can select this region. • *Not Available To Anyone:* No users can select this region. • *With Global Security Only:* Only users who have access to that region's country functionality assigned to their primary permission list can select that region. See Setting Up Security for Local Functionality. **Note:** If you choose not to maintain the country-level data security, then select *Available to All* or *Not Available to Anyone* to provide universal access to regulatory regions. To simplify maintenance, availability is established only once for each regulatory region and is used for all transactions.

Default Record Group Set IDs

Use this group box to specify the set IDs that make up this regulatory region. Since regulatory region is used to drive set processing in some applications, such as Health and safety, regulatory region is a set control value. The default record group set IDs establish an initial set processing relationship for this new regulatory region.

Field or Control	Description
Set ID	When you add a regulatory region, the **Set ID** field is available for entry, and the **Clone From Existing Regulatory Region** field is unavailable for entry. The system places a default set ID in the set ID field that bears the same name as the Regulatory Region Code that you just defined. If you haven't defined a set ID that matches this code, select another applicable set ID for your regulatory region from the list of valid values. The set IDs in the list were set up using the TableSetID table. You can select only from those set IDs. **Note:** Before you can specify set IDs, you must define set IDs, record groups, set control values, and TableSet record group controls, using the components on the **PeopleTools**, and then **Utilities**, and then **System Administration** menu. See Understanding PeopleSoft HCM System Data Regulation.

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Field or Control	Description
Clone from Existing Regulatory Region	You can clone the set IDs attached to this new regulatory region from an existing regulatory region. Use this option if the new regulatory region that you're defining requires the same default record group set IDs as those that you've already created for another region. Enter the regulatory region that you want to clone.

For more information, see the product documentation for *PeopleTools: Data Management*.

Related Topics

- Understanding PeopleSoft Security
  PeopleSoft security is based on permission lists and roles.
- Understanding Data Permission Security for HCM
  Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

Establishing Regulatory Transaction Types

To establish regulatory transaction types, use the Regional Transactions component (REG_TRX_REGION).

These topics provide an overview of regulatory transactions and discuss how to add regulatory regions to a transaction.

Pages Used to Update or Add Regulatory Transactions

Page Name	Definition Name	Usage
Regional Transactions - Transaction Page	REG_TRX	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction Page	REG_TRX_REGION	Define the regulatory regions that make up a regulatory transaction type.

Understanding Regulatory Transactions

Two sets of regulatory transactions are already defined in the system as shown in the following table:

Regulatory Transaction	Countries or Regions Included	Reason
STANDARD	All countries that are supported in the system.	Most applications apply regulatory and legislative edits at the country level.

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Regulatory Transaction	Countries or Regions Included	Reason
HANDS (Health and Safety)	All countries that are included in the system, plus the Canadian provinces.	Most applications apply regulatory and legislative edits at the country level, but Canada has specific provincial laws governing their Health and Safety reporting.

Use the two pages in the Regional Transactions component (REG_TRX_REGION) to assign new regulatory regions to these transaction types (if you have added countries or regulatory regions to the system) and to establish new regulatory transactions.

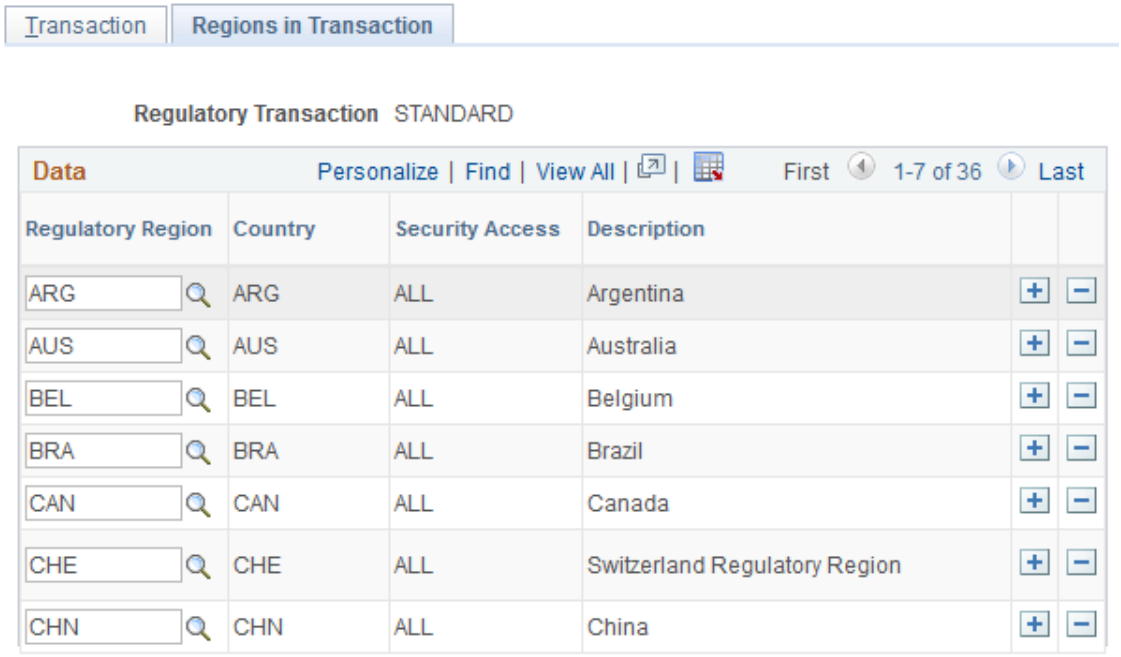
Regions in Transaction Page

Use the Regional Transactions - Regions in Transaction page (REG_TRX_REGION) to define the regulatory regions that make up a regulatory transaction type.

Navigation:

Set Up HCM, and then **Install**, and then **Regional Transactions**, and then **Regions in Transaction**

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



Field or Control	Description
Regulatory Region	Select the regulatory regions that belong to this transaction.

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Installing Person Objects

To install person objects, use the Person Object Installation component (INSTALL_PERSON).

This topic discusses how to install person objects.

Page Used to Install Person Objects

Page Name	Definition Name	Usage
Person Object Installation Page	INSTALL_PERSON	Select installation settings for the Add a Person component (PERSONAL_DATA).

Person Object Installation Page

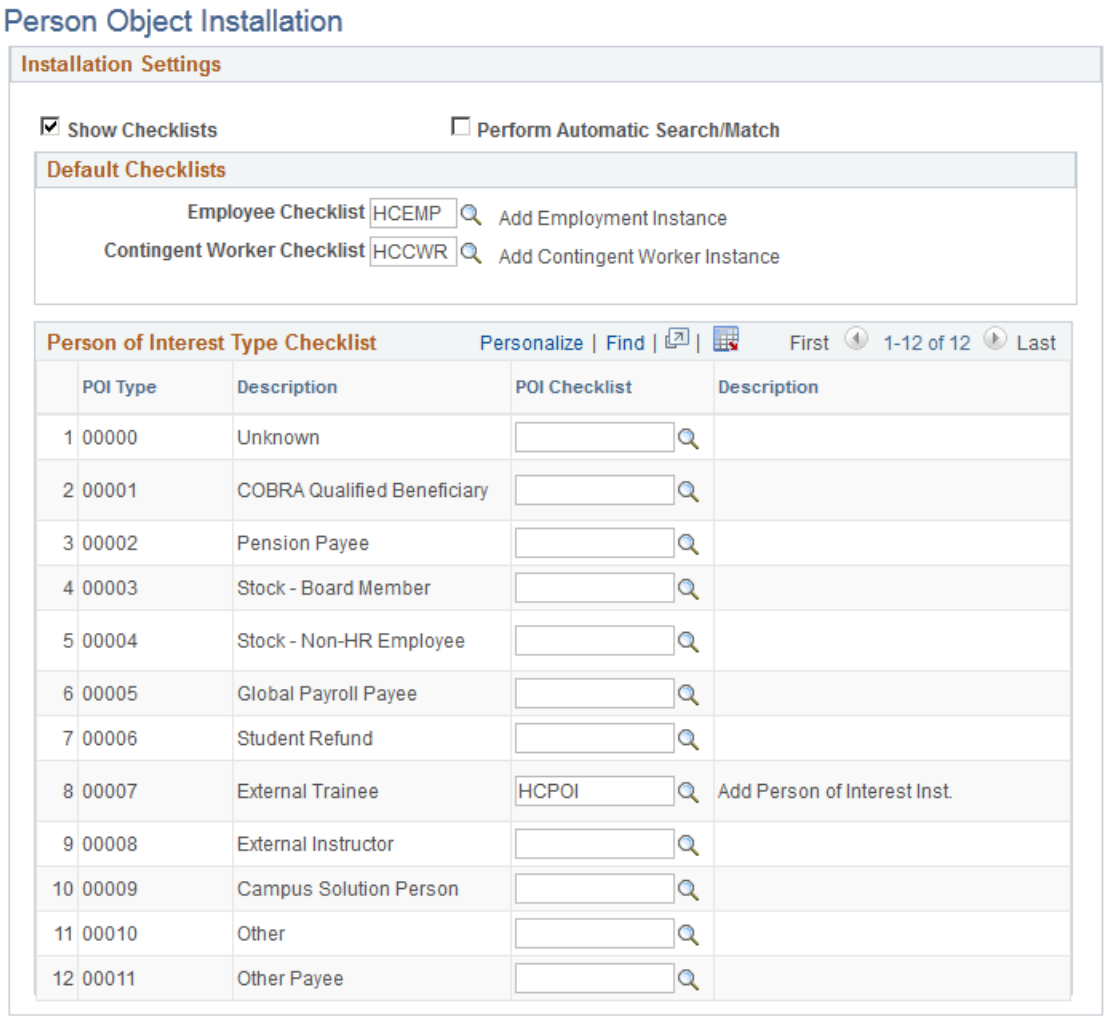
Use the Person Object Installation page (INSTALL_PERSON) to select installation settings for the Add a Person component (PERSONAL_DATA).

Navigation:

Set Up HCM, and then **Install**, and then **Person Object Installation**, and then **Person Object Installation**

This example illustrates the fields and controls on the Person Object Installation Page. You can find definitions for the fields and controls later on this page.

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Installation Settings

Field or Control	Description
Show Checklists	Select to show the Checklists Code field on the Organizational Relationships page (PERSON_DATA4), enabling users to select a checklist for the person they are adding and create a record in the Person Checklist component (PERSON_CHECKLIST).
Perform Automatic Search/Match	Select to perform an automatic search and match when you add a person to the PERSONAL_DATA component. The system will search the database to determine that you are not entering a duplicate record.

Default Checklists

Select the default checklists that the system will display in the **Checklist Code** field on the Organizational Relationship page when you add to add one of the following relationships for the new person:

- Employee.

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  - In the **Employee Checklist** field, select the default checklist for commercial employees.
  - In the **French Public Sector Emp** field, select the default checklist for French public sector employees.

- Contingent Worker.

  In the **Contingent Worker Checklist** field, select the default checklist for contingent workers.

- Person of Interest

  For each POI type listed in the **Person of Interest Type Checklist** grid for which you want a default checklist, select the checklist.

The system will create a record in the Person Checklist component by identifying this checklist code on the Organizational Relationship page when you first create the person.

Set up checklists on the Checklist component (CHECKLIST_TABLE).

See PeopleSoft Human Resources Administer Workforce: Creating Checklists.

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8

Setting Up and Working with Search/Match

Understanding Search/Match

To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data into your system, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

- Person (Empl ID)
- Applicant (HRS_PERSON_ID within PeopleSoft Talent Acquisition Manager)

> **Note**
>
> PeopleSoft delivers these ID types as translate values inside the SM_TYPE field. They are delivered as *Active,* but you can inactivate them depending on the applications that you license. Do not, however, add or delete ID type values.

For each of these ID types, departments or business areas can, based on user security roles, define their own search criteria to perform a search. The criteria can include defining search rules and placing them in the desired order within a search parameter. Each department or business area can also set what data to display in the results to identify a possible matching ID. Departments and business areas can set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security to perform ad hoc searches without the constraints of predefined criteria.

Data returned in a search result can contain sensitive information. You can control whether to entirely or partially mask a field or display the entire field. The masking configuration can be controlled with user security access. With search results and display controls defined, users can perform Search/Match to determine if a record already exists before adding one.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID by transferring the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and reenter the data to determine whether the ID exists.

You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

Also, if you use multiple search rules, you should order the rules from the most restrictive to the least restrictive. For example, rule 1 could return matching IDs when first name, last name, phone number and national ID exactly match. Rule 4 could return matching IDs when only the first and last name match. In this example, rule 4 could return more potential matching IDs than

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rule 1. The search rule used by Search/Match could therefore be used as an indicator to users of how significant the returned results are.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.

Use search result codes to specify 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. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.

Some search rules, search parameters, and search results are delivered with your system. You can use these as they are, modify them, or add as many as you need.

> **Warning**
>
> Adding new search fields require significant programming effort and is not recommended.

Related Topics

- Automatic Search
  Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

Automatic Search

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

If the component name is associated with a search parameter code and a search result code, Search/Match displays the search results inside a grid on the Search Results page. This enables users to review the potential duplicate IDs without having to manually navigate to the Search/Match page. After reviewing the results on the Search Results page, the user clicks

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Return and is instructed to either click **OK** to continue saving the new ID or to click **Cancel** to avoid saving the transaction and investigate further.

> **Note**
>
> This setup is valid only when creating person IDs from HRS_PREP_FOR_HIRE component.

> **Warning**
>
> To display the Search Results page at save time, you must have a security role with access to the component interface HCR_SM_SEARCH.

See Search Results Page.

See *PeopleTools: Security Administration*

> **Note**
>
> This setup is valid only when creating person IDs from the Personal Data (PERSONAL_DATA) component for commercial HCM and the Employee Hire (EE_HIRE) component for Federal HCM.

Enabling the Auto Search/Match Feature

You enable Automatic Search/Match processing in HCM by selecting the Perform Automatic Search/Match check box on the Person Object Installation page (INSTALL_PERSON).

When you select the check box, the system checks to see if a Search Parameter and a Search Result code have been associated with the PERSONAL_DATA component (or the EE_HIRE component for Federal). If it finds codes, it displays these rule names. If not, the system generates a warning informing you that Automatic Search/Match processing will not occur until you associate Search Parameter and a Search Result code with the PERSONAL_DATA or EE_HIRE components.

See Setting Up Person of Interest Types.

Understanding Automatic Search Conditions

Search/Match uses phone and email values to perform the search only when a phone or email value is marked as preferred. Therefore, to use PhoneRule and EmailAddressRule inside a search rule triggered automatically when you save a new ID, the ID must have a preferred phone number and preferred email address.

When Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule are inside a search rule triggered when you save a new person ID, Search/Match uses the address fields for only the home address type to perform the search. That is, if any address type other than *HOME* is entered, Search/Match does not use the address fields as search criteria.

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Setting Up Search/Match

To set up Search/Match use the Search Match Rules (HCR_SM_RULE), Search/Match Parameters (HCR_SM_PARM), Search/Match Result Fields (HCR_SM_RSLT_FLDS), Search/Match Results (HCR_SM_RESULT), and Search/Match (HCR_SM_SEARCH) components.

These topics discuss how to set up Search/Match.

Pages Used to Set Up Search/Match

Page Name	Definition Name	Usage
Search/Match Rules Page	HCR_SM_RULE	Define sets of fields to search for and identify how to search for them.
Search Parameters Page	HCR_SM_PARM	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Permissions Page	HCR_SM_PERM	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Search/Match Result Fields Page	HCR_SM_RSLT_FLDS	View or add fields that are available to define the search results.
Search/Match Results - Search Results Page	HCR_SM_RESULT	Specify which result fields to include in the search results and control how to display their values. Be careful not to confuse this page with the page also called *Search Results* with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.
Search/Match Results - Search Results Detail Page	HCR_SM_RDTL_PG	Define the page to use to view more information about a specific ID returned by Search/Match.
Search/Match Results - Search Results Exceptions Page	HCR_SM_RESULT_EXCP	Define field-level security exceptions to the data display control that is set on the Search Results Permissions page.

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Page Name	Definition Name	Usage
Search Result Permissions Page	HCR_SM_RSLT_PERM	Identify who should have access to this search result code. Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

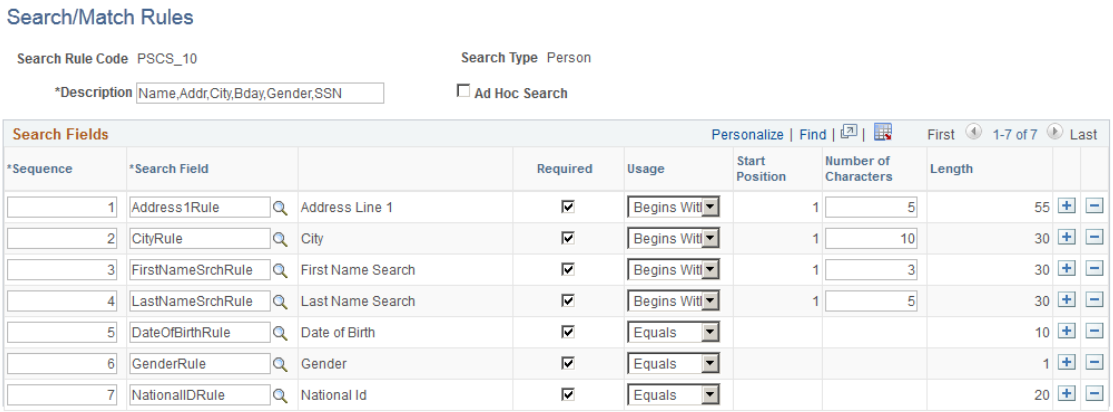
Search/Match Rules Page

Use the Search/Match Rules page (HCR_SM_RULE) to define sets of fields to search for and identify how to search for them.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Rules**, and then **Search/Match Rules**

This example illustrates the fields and controls on the Search/Match Rules page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Ad Hoc Search	Select to permit ad hoc searches from this search rule. An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Search Fields

Search fields are delivered with your system.

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> **Warning**
>
> Adding new search fields require significant programming effort and is not recommended.

Field or Control	Description
Sequence	Enter the order in which you want the search fields to appear when used inside a search parameter.
Search Field and **Field Description**	Select each search field that you want to assign to this search rule code. When you exit the field, the system displays the associated description. Search fields are the fields on which users are permitted to search. Search fields are delivered with your system. Adding or modifying a search field value requires a significant programming effort. Do not attempt to delete a search field. **Note:** When you include name, national ID, phone, email, or address fields in the rule without the types (Name Type, National ID Type, phone type, email type or address type), the system searches on all national IDs, phones, emails or addresses in the system for that individual.
Required	Select this check box to require a value in the search field to find a potential match on this search rule. Selecting this check box is useful for making the rule more restrictive. If the check box is not selected, the system accepts blank or nonexistent for this field inside this search rule. For example, if all the fields inside a search rule are marked as required, the user must provide data for each of those search fields to find a match on this rule. However, if the **Required** check box is not selected, for example, for Date of Birth, the user can still search on that search rule without specifying a date of birth.

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Field or Control	Description
Usage	Identify how you want the search to evaluate the field value: *Begins With:* The value must begin with this data. When you select this value, the **Start Position** field appears with a default value of *1*, and the **Number of Characters** fields are available for you to define. You cannot modify the start position default value. *Contains:* The value must contain this data but can be preceded or followed by other data. When you select this value, the **Start Position** field appears with a default value of *1*, and the **Number of Characters** fields are available for to you define. *Equals:* The value must be exactly equal to this data. *Not Used:* Do not use this field value in this search.
Start Position and **Number of Characters**	Enter the character position where you want the compare to start, and enter the number of characters from that start position to include in the compare. For example, if the usage selected for National ID is *Contains*, and you enter a start position of 3 and the number or characters of 5, the system compares against the 3rd, 4th, 5th, 6th, and 7th characters in the field value. It will return matching IDs for which the National ID contains these 5 characters. If the usage selected was *Begins With*, the start position is has a default value of *1* and you need to specify how many characters from the first character that Search/Match should use to perform the search.
Length	Indicates the number of characters in the search field. When you exit a particular field in the **Search Field** column, the system displays the total number of characters in the associated field.

See Understanding Search/Match.

Search Parameters Page

Use the Search Parameters page (HCR_SM_PARM) to combine and order search rules.

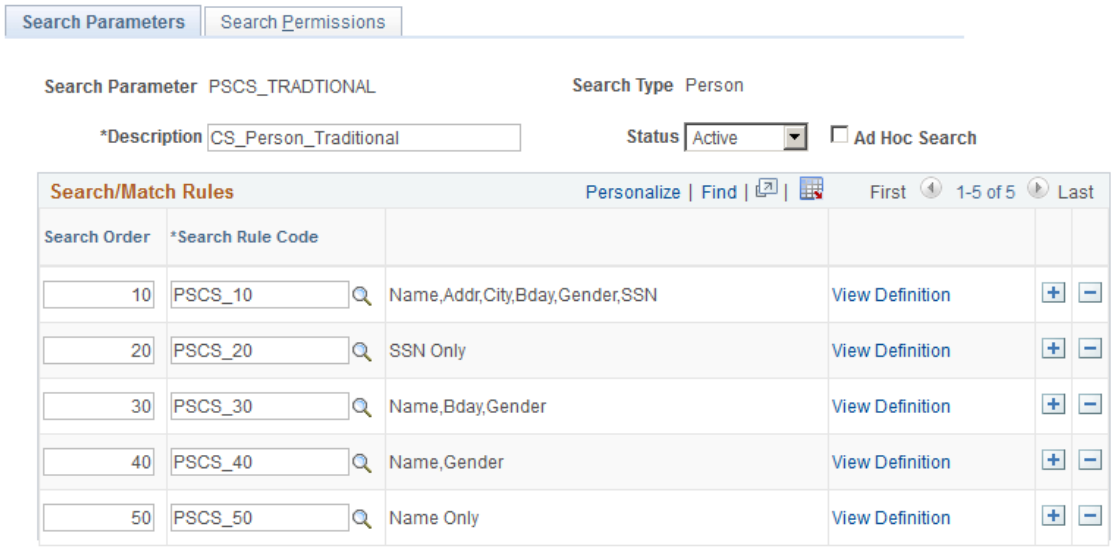
The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Parameters**, and then **Search Parameters**

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



Field or Control	Description
Ad Hoc Search	Select to permit only ad hoc searches from this search parameter. An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *John*). **Note:** Automatic search cannot be performed from a search parameter set to permit ad hoc searches.

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Search/Match Rules

Field or Control	Description
Search Order	Enter the order in which to apply the search rule codes of this search parameter. Enter the most restrictive search rule in the lowest order number and the least restrictive search rule in the highest order number. You can reorder the search rules at any time. When you reorder the rules and save the page, the system displays the rules in the most recent numerical order that you entered. Search/Match processes the lowest order search rule first; if it finds one or more possible matches, it stops the search and returns the results. If it finds no results, it continues to the next search rule, and so on. In the search results, the system displays the search order number that corresponds to the search rule where potential matching IDs are found. You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when the**Ad Hoc Search** check box is selected.
Search Rule Code and **Rule Code Description**	Enter the search rule code to use. When you exit the field, the system displays the search rule description. You must enter at least one search rule to create a valid search parameter.
View Definition	Click this link to access the Search/Match Rules page on which you can view or edit the rule definition.

Search Permissions Page

Use the Search Permissions page (HCR_SM_PERM) to identify who can use the search parameter to perform the search.

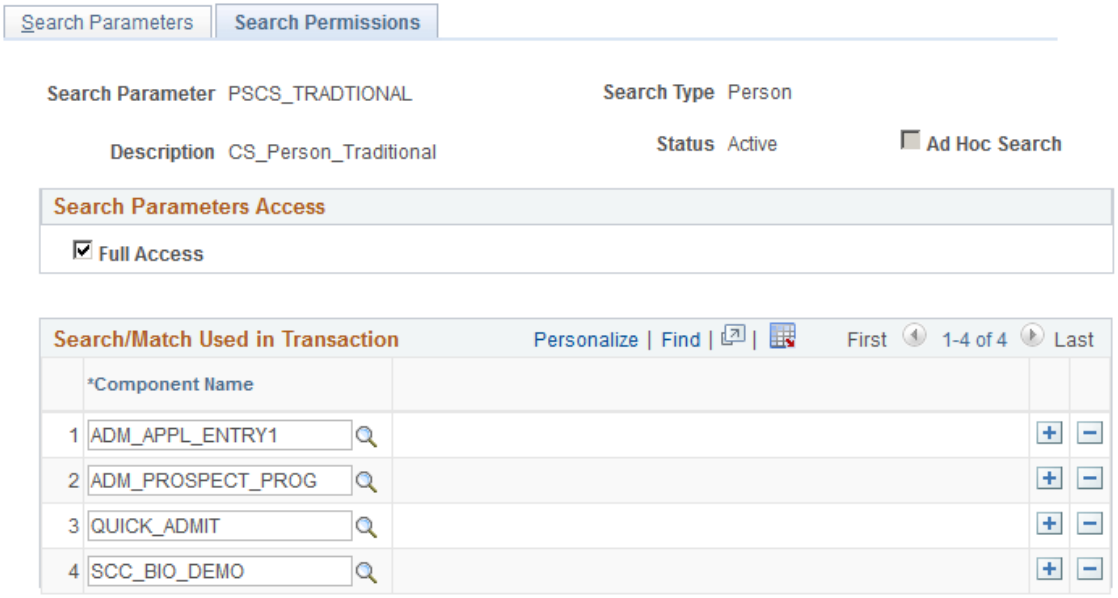
Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Parameters**, and then **Search Permissions**

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

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Search Parameters Access

Field or Control	Description
Full Access	Select to enable all users to use the search parameter code.

Restricted Security Access

This area appears only when the **Full Access** check box is not selected.

Field or Control	Description
Role Name and **Role Description**	Restrict the use of this search parameter code to users that have specific roles inside their security profile.

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Search/Match Used in Transaction

Field or Control	Description
Component Name and **Component Description**	If you want to enforce the use of Search/Match when adding a new ID, select the component name where adding a new ID occurs. The system will then initiate Search/Match when a user enters the data to create a new ID and saves the transaction. You can restrict the search to specific components whether you give permissions to all roles or only to specific roles. **Note:** A component name can be associated with only one search parameter. However, the same search parameter can be used inside several component names. Select all components where the search parameter should be used. **Note:** This field is available only when the Search Type is *Person* or *Organization.* See Understanding Search/Match.

Search/Match Result Fields Page

Use the Search/Match Result Fields page (HCR_SM_RSLT_FLDS) to view or add fields that are available to define the search results.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Result Fields**, and then **Search/Match Result Fields**

This example illustrates the fields and controls on the Search/Match Result Fields page. You can find definitions for the fields and controls later on this page.



Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the

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predefined search fields. You can, however, select additional fields to make available for your search result codes.

When you select *Add a New Value* and enter a name for the results field, the Search/Match Result Fields page appears with enterable fields for you to select the record and field to make available within the search results. To control how the values for a field appear in the results, use the Search/Match Results setup page.

> **Note**
>
> When search result fields are created based on records that are either effective-dated or type-related (such as address type, email type, phone type, and so on), Search/Match returns a row for each of the dates (historical, current and future dates) and types. For example, the field **Gender** is included in the PERS_DATA_EFFDT record. If you use **Gender** as a search result field, then a person with multiple rows on PERS_DATA_EFFDT will display multiple rows with the same gender in the search results grid. This is to make sure the evaluation of potential duplicate IDs is done across all dates and types applicable to each ID. If your organization prefers to see a limited number of rows, you can create the search result fields based on a view that could include logic to limit the effective date to display only current information or logic to return only a specific type (for example select address information where **Address Type** is *Home*).

Search/Match Results - Search Results Page

Use the Search Results page (HCR_SM_RESULT) to specify which result fields to include in the search results and control how to display their values.

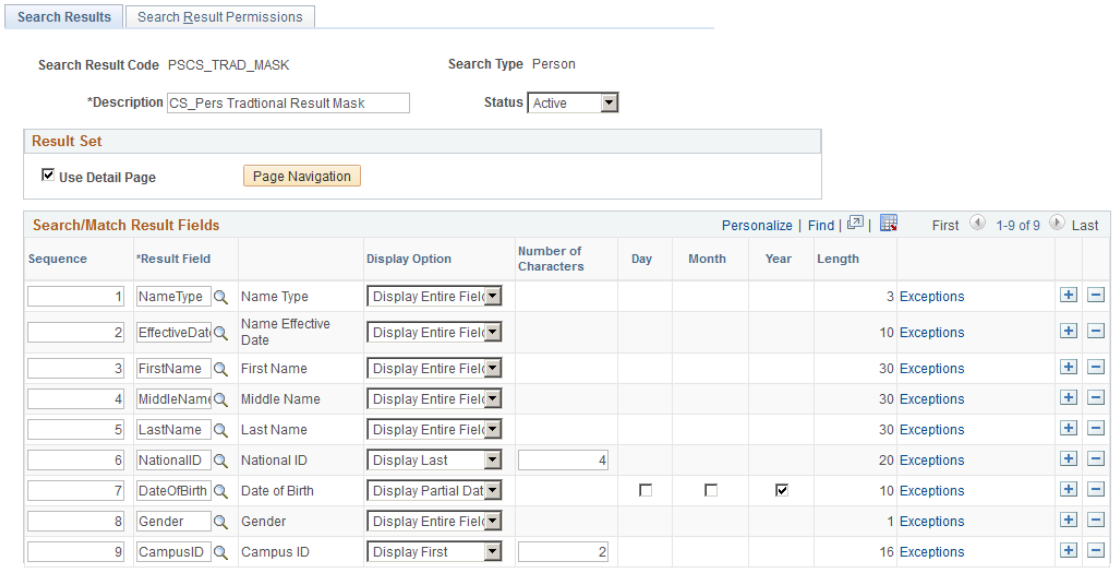
Be careful not to confuse this page with the page also called *Search Results* with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Results**, and then **Search Results**

This example illustrates the fields and controls on the Search/Match Results - Search Results page. You can find definitions for the fields and controls later on this page.

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Result Set

Field or Control	Description
Use Detail Page	Select this check box to display a **Detail** link beside each ID returned from a search. When you select **Use Detail Page**, the **Page Navigation** button appears.
Page Navigation	This button appears only when the **Use Detail Page** check box is selected. Click to access the Search Results Detail page, on which you can define the page to which you want users to be directed to see more details about a specific ID. **Note:** To be transferred to the page that you define here, the user must have security access to the page.

Search/Match Result Fields

Field or Control	Description
Sequence	Enter the order by which the system displays results in the in the Search/Match results grid. You can reorder the result fields at any time. When you reorder the fields and save the page, the system displays the result fields in the most recent numerical sequence that you entered.
Result Field and **Field Description**	Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields). The result fields are defined in the Search/ Match Result Fields page.

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Field or Control	Description
Display Option	Displays the default display control for that field. You can override this. Select *Display Entire Field* or *Mask Entire Field* to display or hide the entire field value respectively . The other options are: *Display First:* Displays the first specified number of characters of the field value. When you select this, the **Number of Characters** field appears. You must enter the number of characters to display from the beginning of the field value. *Display Last:* Displays the last specified number of characters of the field value. When you select this, the **Number of Characters** field appears. You must enter the number of characters to display from the end of the field value. *Display Partial Date:* Displays the specified parts of a date field value. When you select this, the **Day, Month, Year** check boxes appear. You must select which parts of the date to display. For example if you select *Year*, only the year will appear.
Number of Characters	Enter the number of first or last characters of a field value to display.
Day, Month, Year	Select the parts of the date to display for a date value.
Length	Displays the number of characters possible for the field value.
Exceptions	Click this link to access the Exceptions page, on which you can define field-level exceptions to these results. **Note:** Search/Match returns all potential matching IDs regardless of data permission security. You must use field-level security to mask or partially mask sensitive data. See Understanding PeopleSoft Security and Understanding Data Permission Security for HCM.

Search/Match Results - Search Results Detail Page

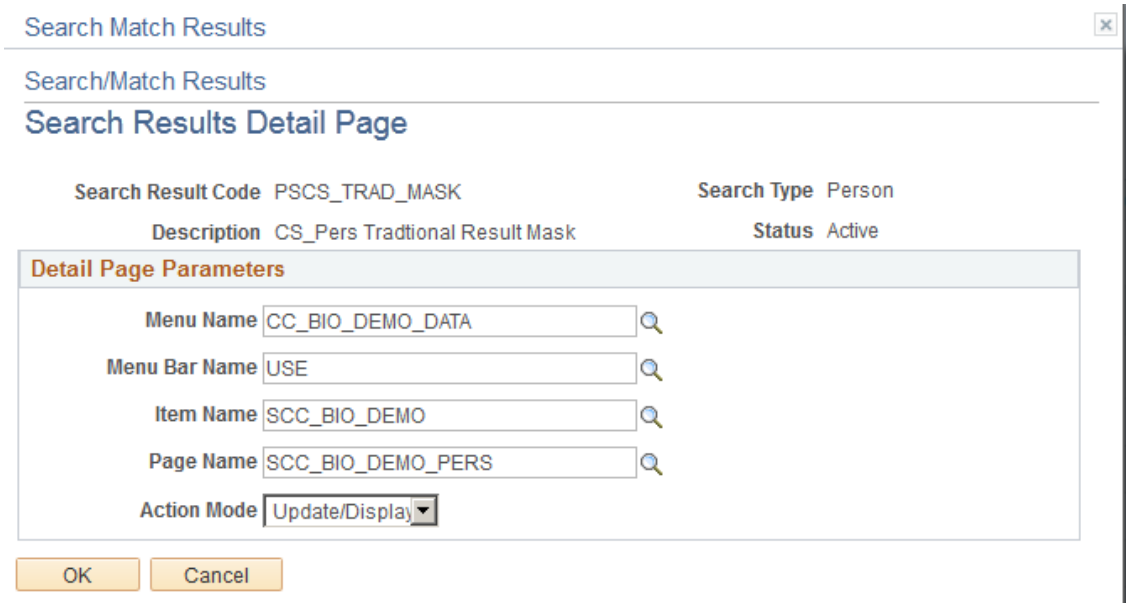
Use the Search/Match Results - Search Results Detail Page page (HCR_SM_RDTL_PG) to define the page to use to view more information about a specific ID returned by Search/Match.

Navigation:

Click the **Page Navigation** button that appears on the Search Results page when you select the **Use Detail Page** option.

This example illustrates the fields and controls on the Search/Match Results - Search Results Detail Page page. You can find definitions for the fields and controls later on this page.

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Detail Page Parameters

Field or Control	Description
Menu Name, Menu Bar Name, Item Name, and **Page Name**	Select each item that corresponds to the page that you want to use to provide more details about a specific ID.
Action Mode	Select the action mode to define in which mode you want your users to access the detail page. Options are: *Add* *Correction* *Data Entry* *Upd/Dsplay* (update/display) *Update*

Search/Match Results - Search Results Exceptions Page

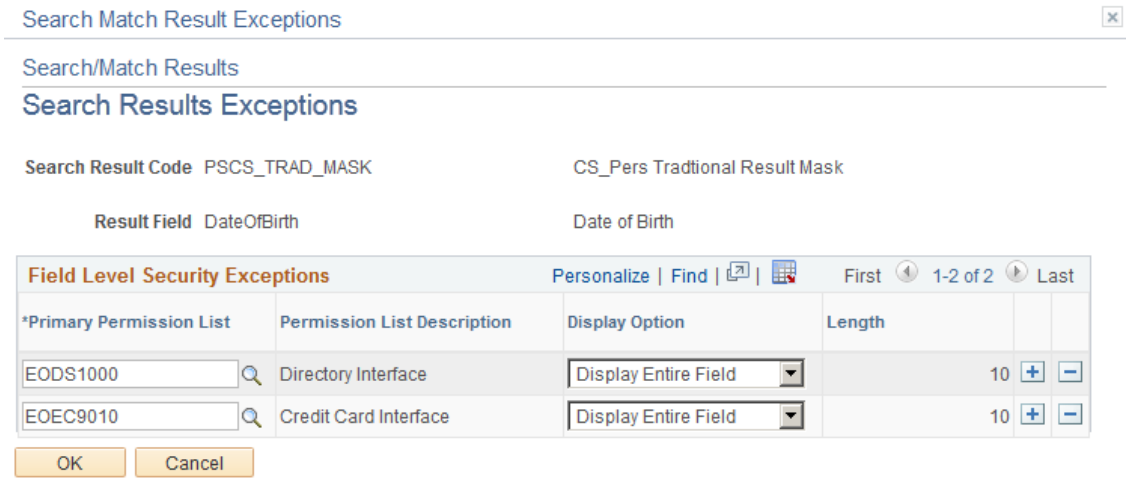
Use the Search/Match Results - Search Results Exceptions page (HCR_SM_RESULT_EXCP) to define field-level security exceptions to the data display control that is set on the Search Results Permissions page.

Navigation:

Click the **Exceptions** link on the Search Results page.

This example illustrates the fields and controls on the Search/Match Results - Search Results Exceptions page. You can find definitions for the fields and controls later on this page.

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You can define exceptions to the search results that you set up on the Search Results page. For example, you might have partially masked the birth date field in your search results, but you want the entire field to appear for those who have a need to know. Using primary permission lists, you can set those exceptions here.

See Understanding PeopleSoft Security and Understanding Data Permission Security for HCM.

See *PeopleTools: Security Administration*

Field Level Security Exceptions

Field or Control	Description
Primary Permission List and **Permission List Description**	Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.
Display Option	Select the display option to use as the exception to the display option selected on the Search Rules page.

Search Result Permissions Page

Use the Search Result Permissions page (HCR_SM_RSLT_PERM) to identify who should have access to this search result code.

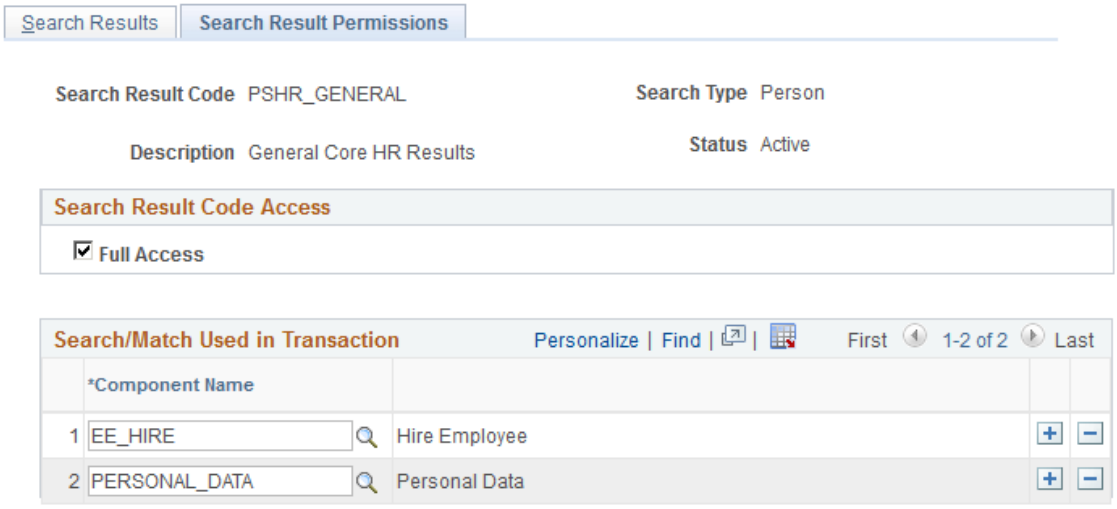
Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match Results**, and then **Search Result Permissions**

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

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Field or Control	Description
Full Access	Select this check box to enable all users to use the search result code
Role Name and **Role Description**	Enter roles to restrict the use of this search result code to users that have this role inside their security profile. These fields appears when the **Full Access** check box is not selected.
Component Name	This field is available only when the Search Type is *Person.* If you use automatic search and want to display a warning message to alert users when potential duplicate IDs exist and you want to display the results of the automatic search, select the same component name or names that you selected on the Search Permissions page for the search parameter. You can restrict the search to specific components whether you give permissions to all roles or to only specific roles. **Note:** A component name can be associated with only one search result code. However, the same search result code can be used inside several component names. Select all components where the search result code should be used. If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a Search Results page showing the matching IDs that were found. See Automatic Search.

Related Topics

- Search Results Page
  Use the Search Results page (HCR_SM_RESULTS) to view Search/Match results of a manual search and investigate potential duplicate IDs.

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Working with Search/Match

These topics provide an overview of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discuss selecting and viewing searches.

Pages Used for Search/Match

Page Name	Definition Name	Usage
Search Criteria Page	HCR_SM_SEARCH	Enter criteria to search for duplicate or multiple records.
Default Search Result Page	HCR_SM_USERDFLT	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results Page	HCR_SM_RESULTS	View Search/Match results of a manual search and investigate potential duplicate IDs. Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft Talent Acquisition Management) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

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Related Topics

- Automatic Search
  Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

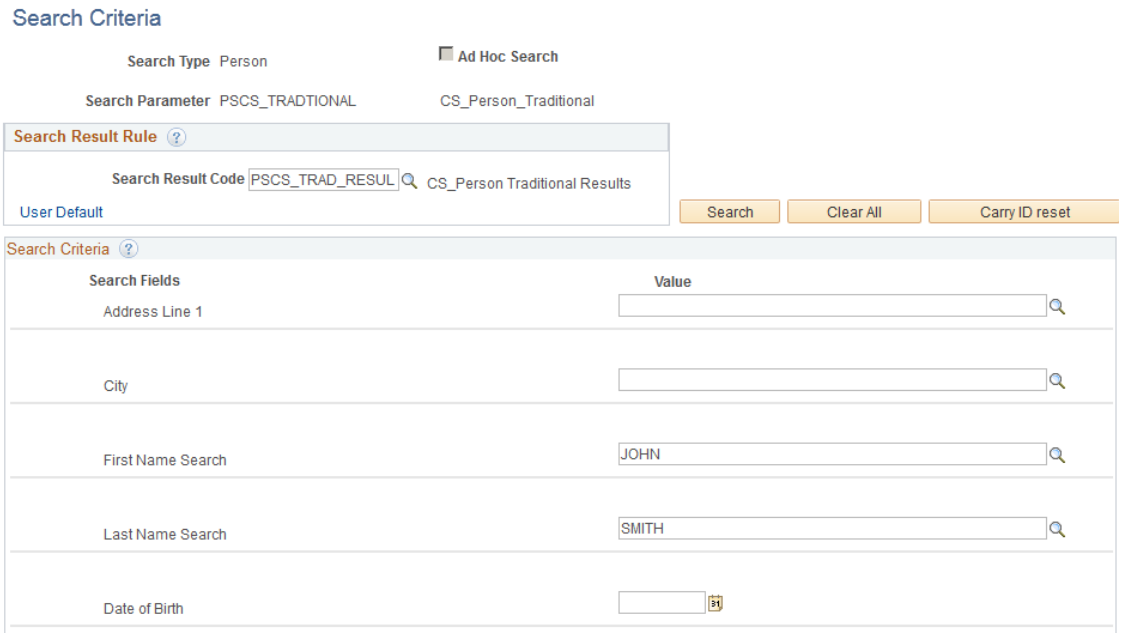
Search Criteria Page

Use the Search Criteria page (HCR_SM_SEARCH) to enter criteria to search for duplicate or multiple records.

Navigation:

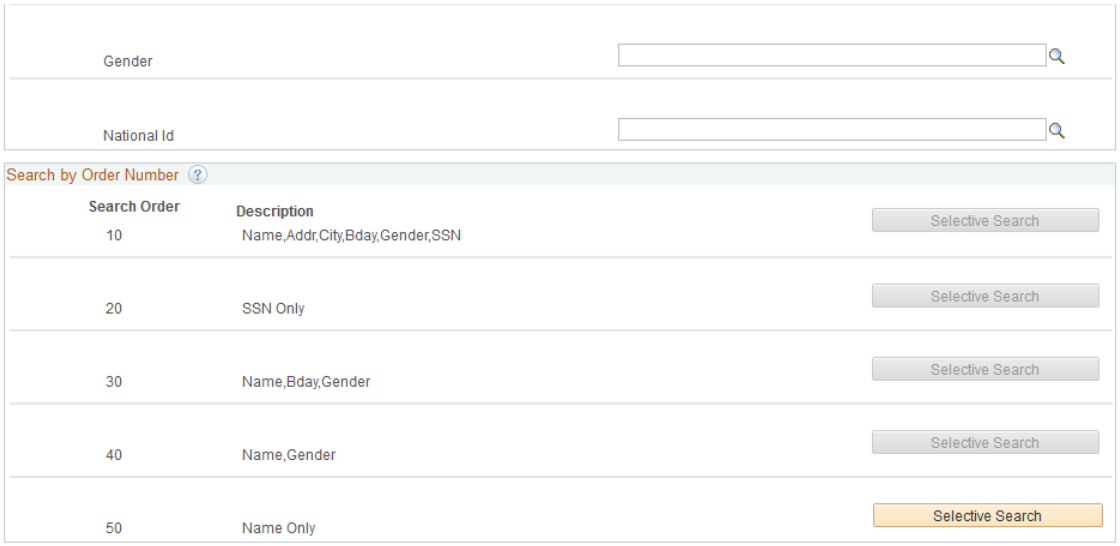
- **Set Up HCM**, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search/Match**, and then **Search Criteria**
- **Workforce Administration**, and then **Personal Information**, and then **Search Person**, and then **Search Criteria**

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

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Field or Control	Description
Search Type	The system displays the search type *(Person)* selected to access the page. If you have licensed PeopleSoft Talent Acquisition Management, you could have selected *Applicant,* and if you have licensed PeopleSoft Campus Solutions, you could have selected *Organization.*
Search Parameter	Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page enables you to select only the search parameters to which your security roles permit you access. Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, click the **Save Search Criteria** link on the search dialog page to save it prior to accessing the Search/Match page. Then, in the future, you can select it from the **Use Saved Search**prompt.

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Field or Control	Description
Ad Hoc Search	The system selects this to indicate that the Search Parameter code is set to perform a ad hoc search. An ad hoc search enables you to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John*, whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*). For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an **Operand** field appears for each search field. The **Operand** field enables you to perform a search that begins with, contains, or equals the search value that you enter. Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear. See Search Parameters Page.

Search Result Rule

Field or Control	Description
Search Result Code	Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent that you are looking for
User Default	Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type. The system permits one default search result code per search type for each user ID.

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Field or Control	Description
Search	Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page. **Note:** When you click **Search,** the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the **Selective Search** button for that order number.
Clear All	Click this button to clear all entries in the **Value** fields.
Carry ID Reset	Click to reset a carried ID to *New.* On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click **Carry ID Reset,** the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs. See Setting Up Primary Permission List Preferences.

Search Criteria

Field or Control	Description
Search Fields	The system displays each of the search fields associated with the search parameter that you selected.
Operand	These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the **Ad Hoc Search** check box and hides the **Search by Order Number** area of the page. Select the operand to perform the search. The valid values are *Begins With, Contains,* and *Equals.* These values are delivered as translate values and should not be changed.
Value	For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

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Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

When you enter criteria in the **Value** fields, the **Selective Search** button for the search order defined with the fields becomes available.

Click the **Selective Search** button to conduct specific searches.

When the search is complete, the system transfers you to the Search/Match Results page.

Search Results Page

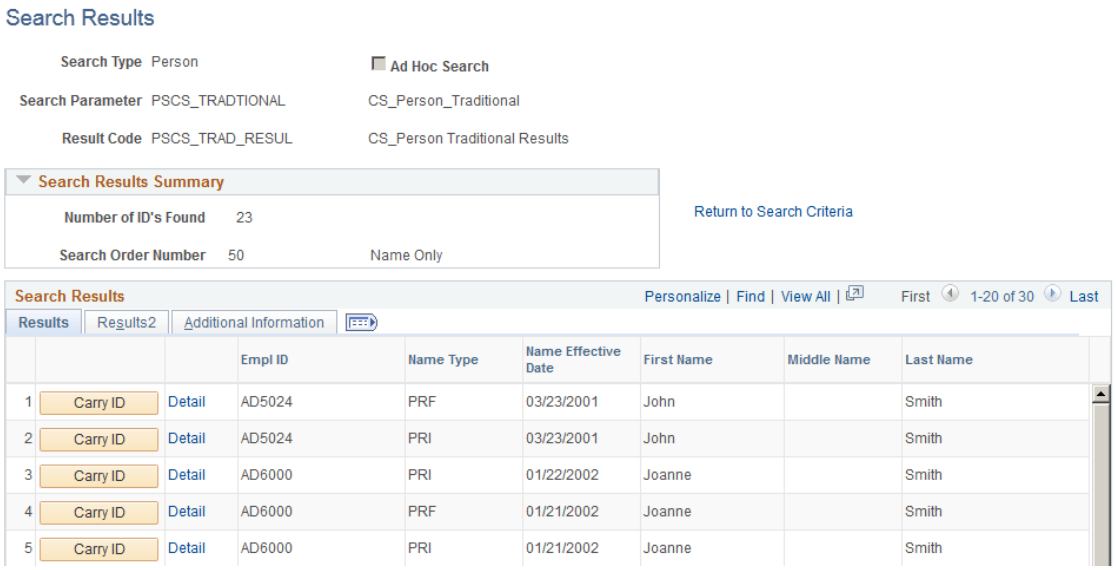
Use the Search Results page (HCR_SM_RESULTS) to view Search/Match results of a manual search and investigate potential duplicate IDs.

Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Navigation:

Enter criteria on the Search Criteria page and click **Search** or click one of the search by order number **Selective Search** buttons to launch a manual search.

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



This example illustrates the fields and controls on the Search Results page: Additional Information tab (for an automatic search). You can find definitions for the fields and controls later on this page.

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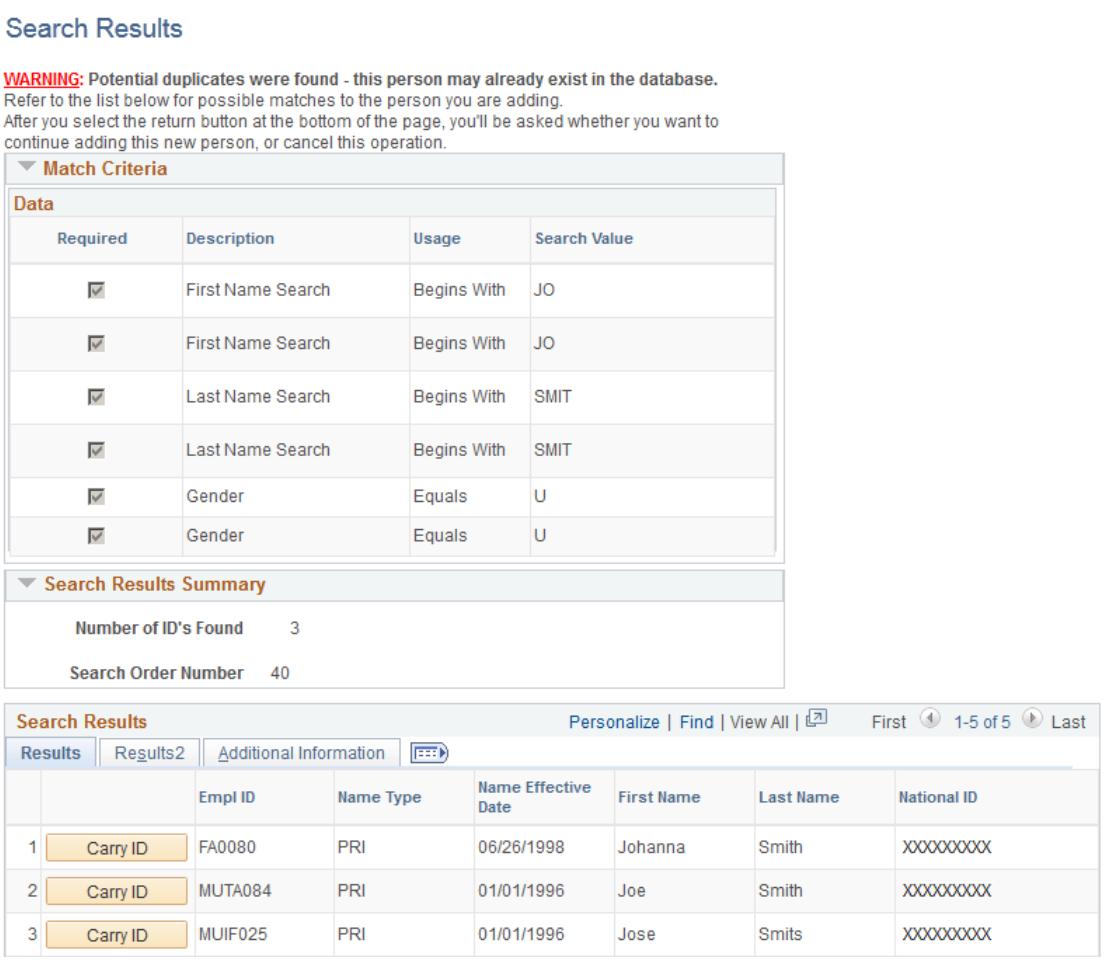


When you enter criteria on the Search Criteria page and click **Search** or any of the search by order number **Selective Search** buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that enables creation of IDs. When you try to add an ID on a component that is set up that way and Search/Match detects potential duplicates at save time, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data entered to create the ID and what where the data used to perform the automatic search.

This example illustrates the fields and controls on the Search Results page, Results tab (automatic search). You can find definitions for the fields and controls later on this page.

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See Understanding Search/Match.

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click **Carry ID** to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Field or Control	Description
Number of ID's Found	Displays the number of IDs that met the search criteria. This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

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Field or Control	Description
Search Order Number	Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Field or Control	Description
Carry ID	Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.
Detail	The **Detail**link appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results Page: Additional Information Tab

This tab appears only when the search type is *Person.*

Field or Control	Description
Person Organizational Summary	Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.
Relations With Institution	Click to access the Campus Solutions Relations With Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching. **Note:** This link is used by customers who are also using PeopleSoft Campus Solutions and only shows if you have selected the Student Administration check box and/or the Contributor Relations check box on the Installation Table - Products page (INSTALLATION_TBL1).

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9

Setting Up and Working with External Search/Match

Understanding External System Integration

PeopleSoft HCM and PeopleSoft Campus Solutions product suites have historically resided within a shared instance of the same database. This coupling enabled HCM and Campus Solutions to share a person model, a single instance of a person in the system, and student refund processing through HR Payroll. HCM and Campus Solutions now reside in separate database instances, with each product suite pursuing its own release cycle. HCM 9.1 and Campus Solutions 9.0 are the first such separate instances. Oracle supports a set of integrations to continue to allow HCM and Campus Solutions to communicate with each other.

External Search/Match is a tool that enables Search/Match functionality to work, in both directions, between the separate HCM and Campus Solutions instances or, with customization, another external target system of your choice.

> **Note**
>
> If your organization is both an Oracle PeopleSoft HCM and an Oracle PeopleSoft Campus Solutions customer, consider reading the External Search/Match FAQs, technical briefs, and various implementation guides that have been developed by Campus Solutions to assist in the integration effort. The documents are posted to My Oracle Support under Doc ID 1259484.1,CS Bundle #19 Functional Documentation for Campus Solutions 9.0 & Feature Pack 4.

Understanding External Search/Match

External Search/Match functionality looks and feels much like the standard Search/Match that exists in PeopleSoft HCM. However, External Search/Match integrates with an external system and enables your institution to perform searches within that external system and import records into Person records. The goal is to provide complete and meaningful lists of potential duplicate IDs in your entire environment, including IDs that reside outside of the HCM database.

External Search/Match executes these searches with the help of two delivered web service operations. You can then use web services to import a matching individual that does not exist inside the HCM database. Web services send outbound search requests from the system of record to an external system and also receive inbound responses coming directly from the external system. As enterprise architectures grow more complex and HCM may no longer be the sole source of person data entry and maintenance, searching against external systems ensures that no duplicates exist in your environment.

External Search/Match searches only for people in an integrated separate-instance system. Use External Search/Match to search simultaneously against HCM and Campus Solutions to identify potential duplicate person records and ensure that you add only unique employee IDs and person records to your HCM system, and carry the employee IDs throughout your

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business processes. The process displays the combined results inside HCM search results pages.

How to Search

As is the case for internal Search/Match, two methods exist for performing searches in an external system:

- *Online search:* Manually navigate to the Search/Match Integrated component and enter search options.
- *Automatic search:* From a Campus Solutions component where an ID can be created, the External Search/Match triggers behind the scenes after user clicks **Save.**

You can perform either an online or an automatic search using External Search/Match.

Online Search

To perform an online search:

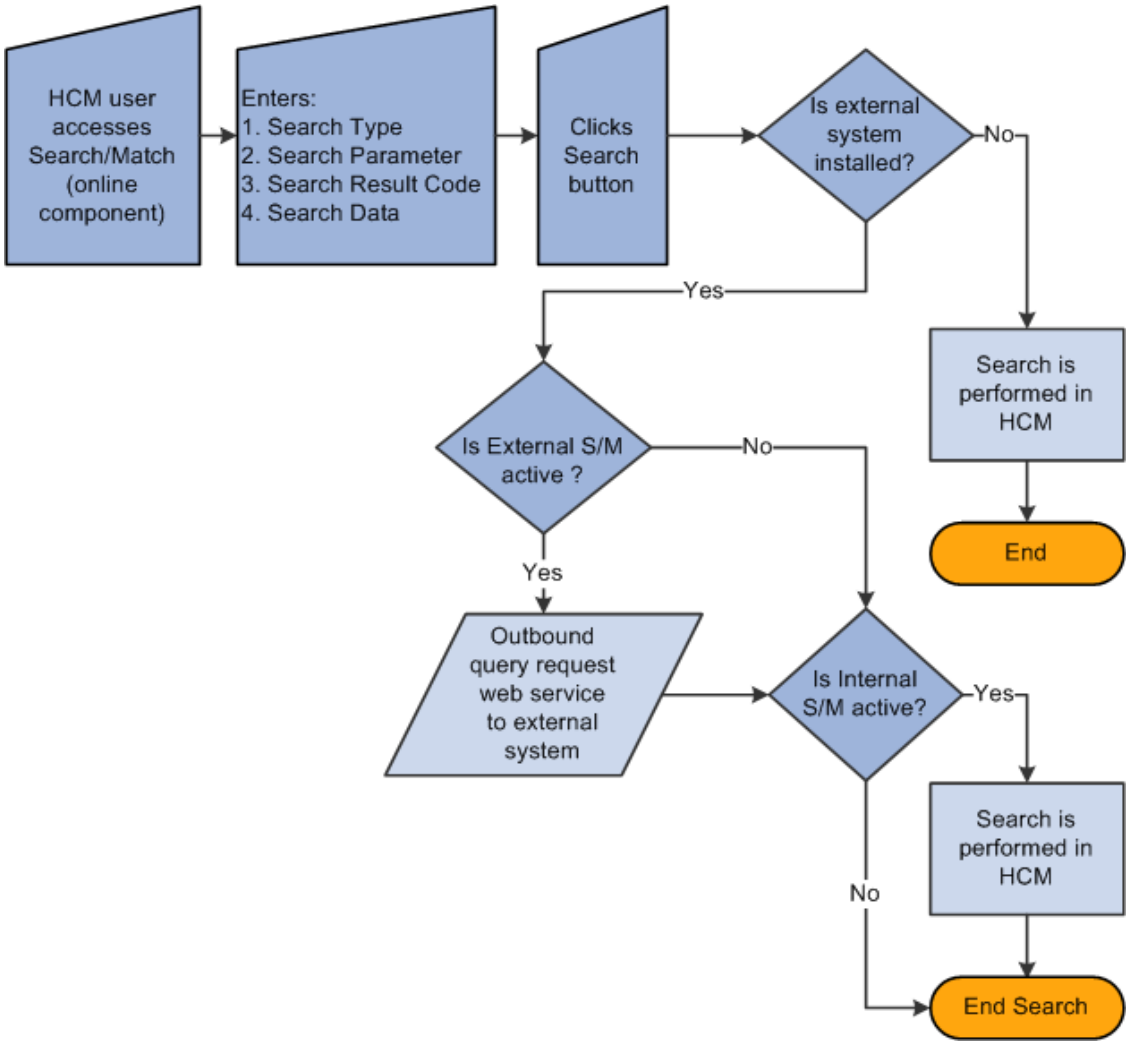
1. Access the Search/Match Integrated component.
2. Select a *Search Type, Search Parameter, Search Result Code,* and other search fields as appropriate; this step is the same as the existing Search/Match.
3. After populating some or all of these fields with search data, click the **Search** or **Selective Search** button.

   The system validates the external system data settings and determines whether the institution supports Search/Match, External Search/Match, or both. This determination causes the system to then perform the search inside the HCM database, outside to an external system, or both.

   If the system determines that an external search should occur, then it generates the outbound search request (Match Request). That search request contains all information known about the search. The XML message will contain the search parameters used, the search fields and their values, and so on.

This diagram displays this online search process:

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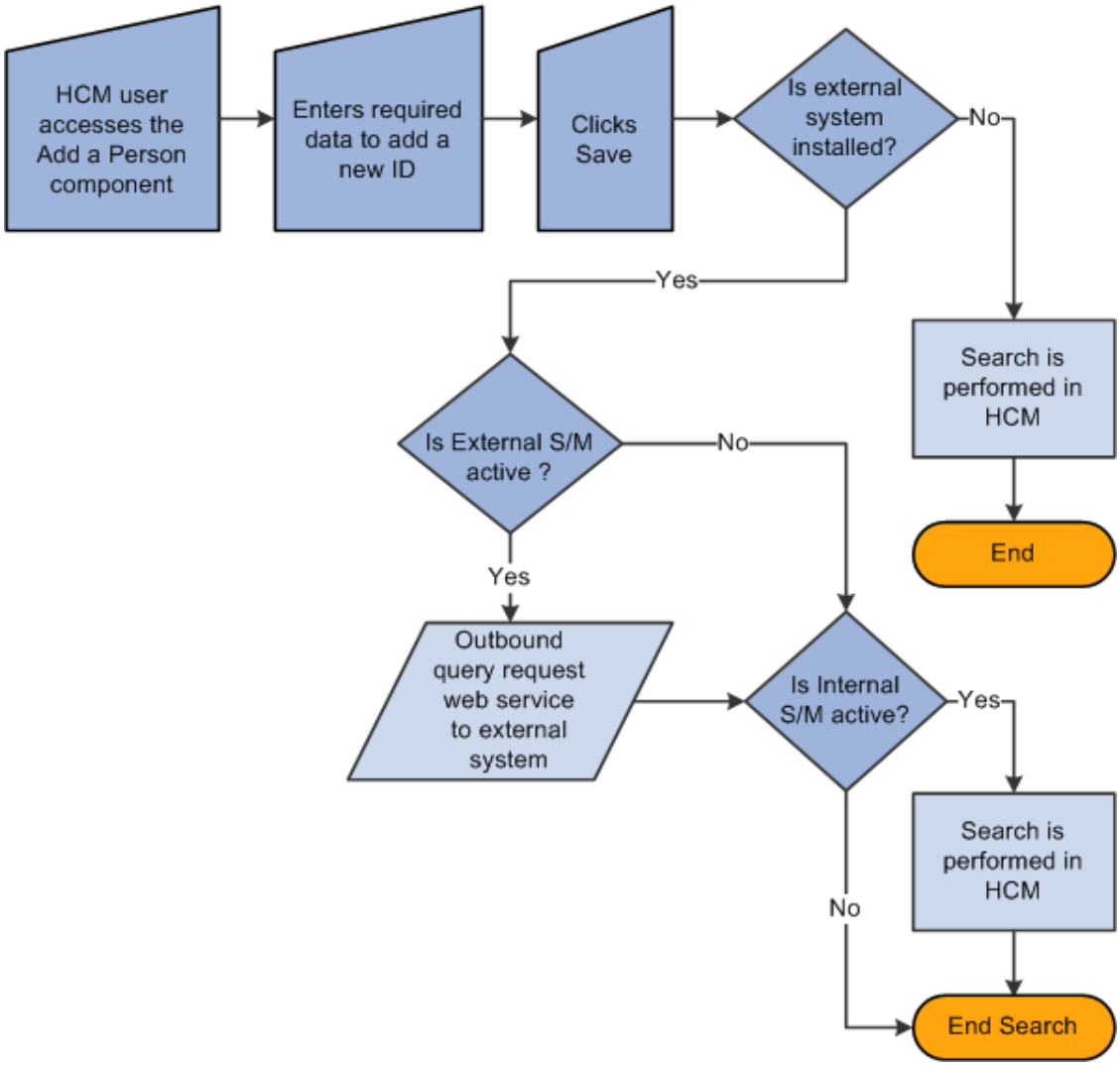


Automatic Search

To perform an automatic search, all of the above information applies. When you enter data to create an employee ID on as HCM page and then click the Save button, the system invokes additional logic to validate the external data integration settings and then triggers the Match Request.

This diagram displays the automatic search business process flow:

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Understanding External Search/Match Web Services

Oracle delivers web services that are triggered and used by External Search/Match functionality. Specifically, these web services are:

- Match service (SCC_SM_SERVICE).
- Fetch request and fetch response (SCC_SM_FETCH).

The *PeopleSoft Campus Solutions Constituent Web Services Developer's Guide* contains more technical details of these web services including examples of the XML message code.

Match Service

When you click the **Search** or **Selective Search** buttons on the Integrated Search Criteria page, the system conducts an Internal Search/Match, External Search/Match, or both. External Search/Match sends a Match Request to the external system. This is an XML message that contains all of the fields included in the search request. The external system returns a Match Response, also an XML message.

The Match Request XML message (SCC_SM_SERVICE_REQ) to the external system exposes all information that the system has:

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- All of the search order numbers that can potentially return matching candidates.
- Search fields.
- Search data.
- Search/Match configuration information.

The Match Response XML message (SCC_SM_SERVICE_RESP) from the external system contains:

- Search order number/rule that found results.
- Matching candidates.
- External System ID/cross reference.
- Person data.

Fetch Request and Fetch Response

When you click the **Detail** or **Import** buttons on the Integrated Search Results page for a individual without an employee ID, the system sends a fetch request to the external system. This is an XML message that requests the full person record from an external system. The external system returns a fetch response, also an XML message.

The fetch request XML message (SCC_SM_FETCH_REQ) to the external system contains the external system ID for which the **Import** or **Detail** buttons were selected.

The fetch response XML message (SCC_SM_FETCH_RESP) from the external system contains the full person record.

When you import a new person record fetched from an external system:

1. The HCM system creates an emplID.
2. The HCM system publishes the PERSON_BASIC_SYNC message, if it has been activated within Integration Broker.

See the PeopleSoft Campus Solutions Constituent Web Services Developer's Guide on My Oracle Support.

Search Results

After the external system search process completes its search for potential matches, the result data is sent to HCM through the response message (Match Response). When you perform a search that triggers both the Internal Search/Match and External Search/Match processes, the system may not find results on the same search order number. The rule for External Search/Match functionality is to display all search results, beginning with the lowest search order number obtained (the most restrictive search rule where matching emplIDs are found). The search order is determined by the Results Engine.

Before it can display your search results, the Results Engine receives the results from both the Internal Search/Match and External Search/Match processes. The engine evaluates the search order number from each system's matching candidates.

- If Internal Search/Match found matching candidates with a lower search order number than the external system, then the Results Engine displays the results from Internal Search/Match; the lowest search order indicates that it was a more restrictive search.
- If the opposite is true, then the Results Engine displays the results found from the external search.

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- If both searches retrieve results on the same search order number, the Results Engine combines the search results into a single display for the user.

Regardless of whether you invoke Internal Search/Match, External Search/Match, or both, the search results appear on the Integrated Search Results page. This page contains many of the same fields as the Search Results page. In addition, the Results tab contains optional columns such as the external system ID and the employee ID. The Results tab uses the same masking configuration that is in place for Search/Match.

When External Search/Match finds a matching candidate that does not exist inside the internal system, the user can use the Detail link to view information about the individual. Clicking the Detail link triggers an outbound web service request for more information (Fetch Request). The external system receives the request and returns detailed person information inside its response web service (Fetch Response). The system then displays (but does not store) the detailed information inside a Detail page that enables you to review the data.

If you determine that the matching candidate is the person you are looking for, you can import the person record from the Integrated Search Results page. When you click the Import button, the system generates a Fetch Request (the same web service used to retrieve more details about the individual) and uses the information contained in the Fetch Response to create the new person record inside the HCM database. After you generate the person's emplID, you can then use it to perform subsequent transactions.

Setting Up External Search/Match

These topics describe the prerequisites for setting up External Search/Match and discuss setting up external Search/Match.

Pages Used to Set Up External Search/Match Functionality

Page Name	Definition Name	Usage
External System Integration Page	SCC_EXT_SYSTEM	Specify an external system that is integrated with HCM for person data.
Search Match with External Sys Page	SCC_CS_HUB_INSTALL	Specify External Search/Match options when integrating with an external system.

Related Topics

- Understanding Search/Match
  To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data into your system, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

Prerequisites

While your current Search/Match setup can remain unchanged, Oracle recommends that you review it to maximize the search capabilities offered by the external system.

- *SearchResults:* If your results code(s) contain fields that are not stored inside your integrated external system, and if the person returned has an emplID in the HCM system, the Results Engine fetches the data inside the HCM database to populate the Results tab.

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For example, a user uses a Search Results code that contains the Job Code field. If your external system does not store that information, the Results Engine uses the returned emplID to fetch the HCM database and retrieve the information. This is also true for matching candidates returned with an emplID. If the matching candidate is not stored in the HCM database (no emplID exists), then the Job Code column remains blank for that candidate.

- *Search Results code masking configuration:* The system reuses the existing setup when you use a Search Results code with masking configuration and the external system returns results for display.

In addition, you must set up Integration Broker to trigger the following web services:

- SCC_SM_FETCH (Search/Match fetch service).
- SCC_SM_SERVICE (External Search/Match service).

Finally, you must grant users security to the Search/Match Integrated component.

> **Note**
>
> All searching capabilities included inside the Search/Match component are included inside the Search/Match Integrated component

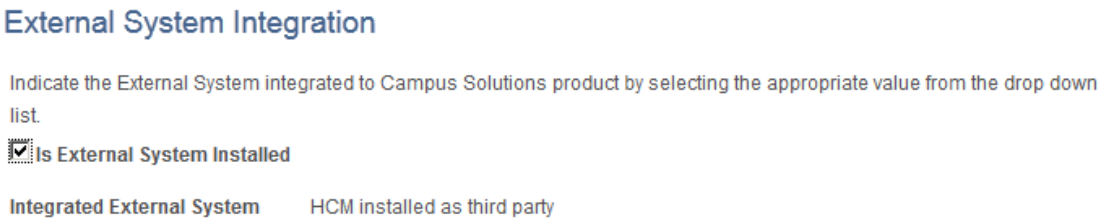
External System Integration Page

Use the External System Integration page (SCC_EXT_SYSTEM) to specify an external system that is integrated with HCM for person data.

Navigation:

Set Up HCM, and then **Install**, and then **External System Search Match**

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



Field or Control	Description
Is External System Installed	Select this check box to indicate whether HCM is integrated with an external system. If you do not select this check box, the other fields on the page are unavailable for input. When users perform a Search/Match, the system evaluates this indicator and determines whether to invoke External Search/Match functionality.

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Field or Control	Description
Integrated External System	*HCM installed as third party* indicates that HCM and Campus Solutions systems are in separate instances and the administrative user has distinguished the Campus Solutions system as an external system with direct integration between the two.

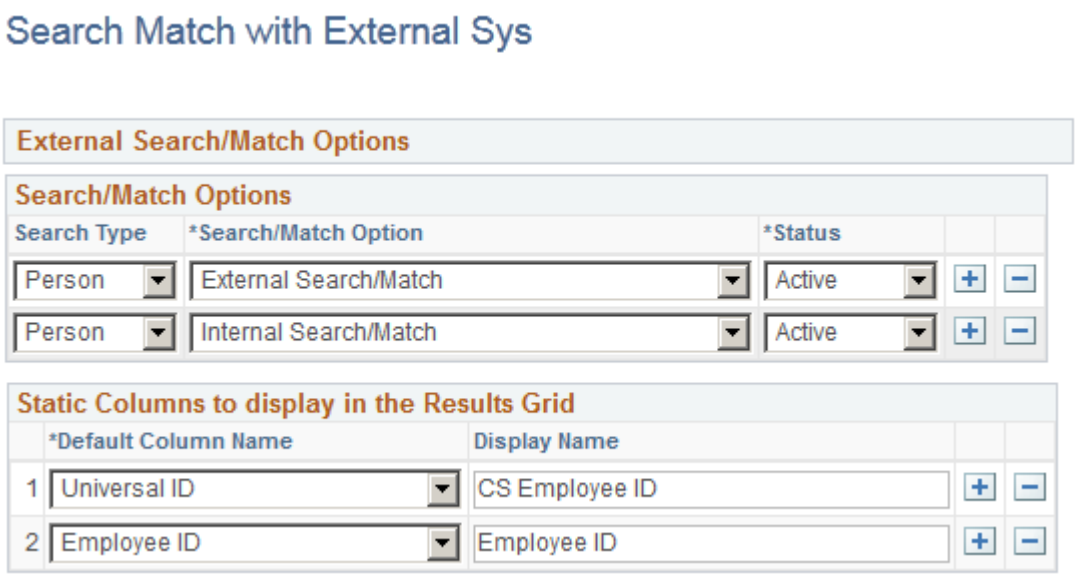
Search Match with External Sys Page

Use the Search Match with External Sys page (SCC_CS_HUB_INSTALL) to specify External Search/Match options when integrating with an external system.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Search/Match**, and then **Search Match with External Sys**, and then **Search Match with External Sys**

This example illustrates the fields and controls on the Search Match with External Sys page. You can find definitions for the fields and controls later on this page.



If the **Is External System Installed** check box is not selected on the External System Integration page, the following message appears: “Currently, no External System is configured with Campus Solutions. To configure an External System, navigate to External Core Data Integration page.”

Search/Match Options

Fields in this group box determine under what conditions the system will use Search/Match, External Search/Match, or both when adding a new person or saving an updated Biographical Details page.

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Field or Control	Description
Search Type	Select *Person, Applicant,* or *Organization.* **Note:** Currently, you may select only the *Person* option. The other search types are not yet integrated with External Search/Match
Search/Match Option	Select which Search/Match functionality to use when an external system is installed: If you select *Internal Search/Match,* and you make it *Active,* then the Search/Match process will search for person IDs inside the HCM database. If you select *External Search/Match,* and you make it *Active,* then the External Search/Match process will search for person IDs inside the integrated external system (the HCM system and the external Campus Solutions system, or whatever external system you targeted). **Note:** Both searches can be selected at the same time, and results appear from both searches on the same Integrated Search Results page.

Static Columns to Display in the Results Grid

Fields in this group box contain information about additional columns to display inside the Results grid of the Integrated Search Results page.

Field or Control	Description
Default Column Name	Select *Employee ID* and *Universal ID.* These are delivered translate values; do not modify them: *Employee ID* appears by default (just like for internal Search/Match). *Universal ID* is a generic term that refers to the external system ID in use. When selected, the external system ID appears inside the Additional Information tab of the Results grid. **Note:** *Score* is a generic term that refers to your external system method for ranking the matches found. It is the weight or the accuracy of the results found. It is sometimes expressed by a percentage or a number. If your external system does not have ranking capability, do not select this option. When selected, the column appears first in the Results grid. If you select *Score,* then the system sorts search results in the Results grid by score in descending order and by empl ID in ascending order. If you do not select *Score,* then the search results appear only by empl ID in ascending order.
Display Name	Enter a custom column name for the static columns that appear in the Results Grid

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Working With External Search/Match

These topics discuss how to use External Search/Match from within PeopleSoft HCM, provide an overview of working with external search/match, and discuss working with external search/match.

Pages Used for External Search/Match

Page Name	Definition Name	Usage
Search Criteria Page	HCR_SM_SEARCH	Enter criteria to search for duplicate person or multiple person records contained inside an external system. When the page is accessed through the SCC_SM_SEARCH component, then the system performs the External Search/Match evaluation.
Integrated Search Results Page	SCC_SM_RESULTS	View Search/Match results of an external system search and investigate potential duplicate IDs.
Biographical Details Page	SCC_SM_RESP_DTL	View personal data stored inside the external system.
Regional Page	SCC_BIO_DEMO_REG	View regional data stored inside the external system.

Related Topics

- Setting Up External Search/Match
  These topics describe the prerequisites for setting up External Search/Match and discuss setting up external Search/Match.

Search Criteria Page

Use the Search Criteria page (HCR_SM_SEARCH) to enter criteria to search for duplicate person or multiple person records contained inside an external system.

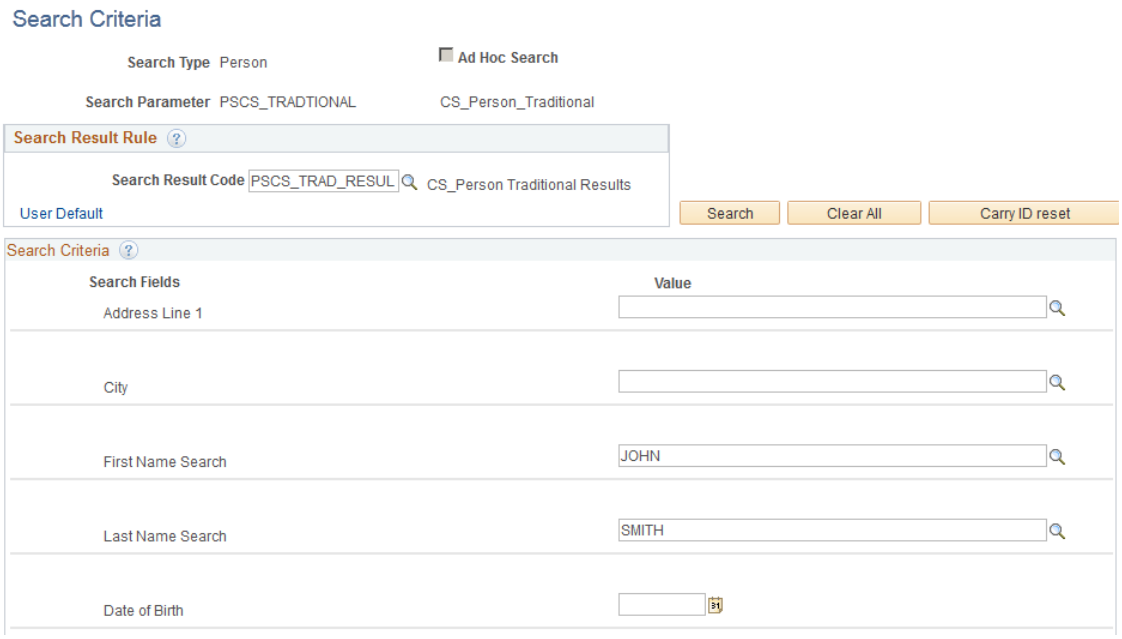
When the page is accessed through the SCC_SM_SEARCH component, then the system performs the External Search/Match evaluation.

Navigation:

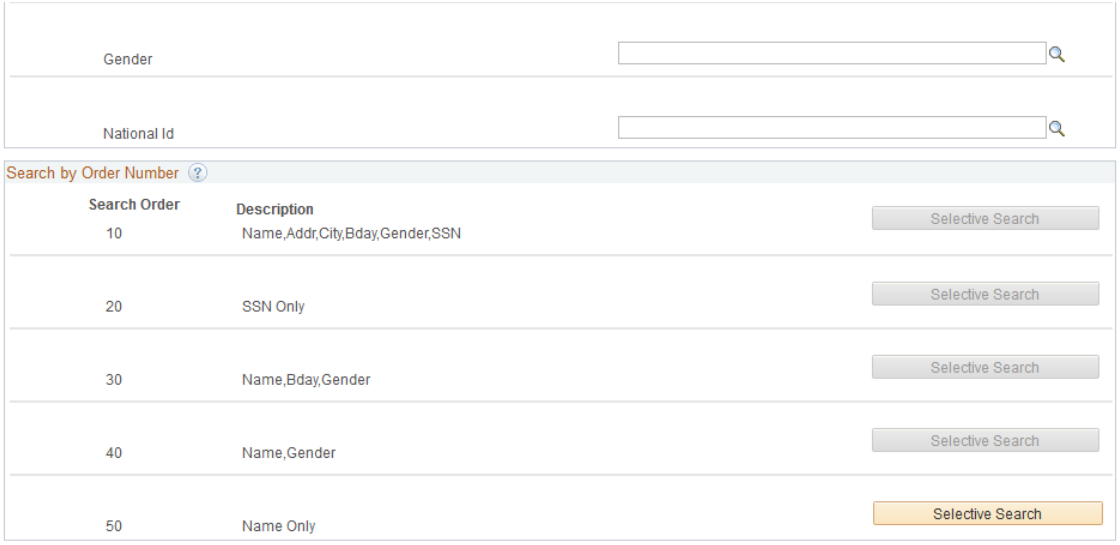
Workforce Administration, and then **Personal Information**, and then **Search Match Internal/External**

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

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



The fields on this page are the same as those on the Search/Match page. However, the SCC_SM_SEARCH component includes logic that evaluates the external system data settings when you click the **Search** or **Selective Search** button. Note that this is only true when the **Search Type** is *Person.*

> **Note**
>
> For a **Search Type** of *Applicant* or *Organization,* the system triggers Search/Match only if on the Search Match Options for External Systems page, **External Search Match** is set to *Inactive* and **Internal Search Match** is set to *Active.*

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Integrated Search Results Page

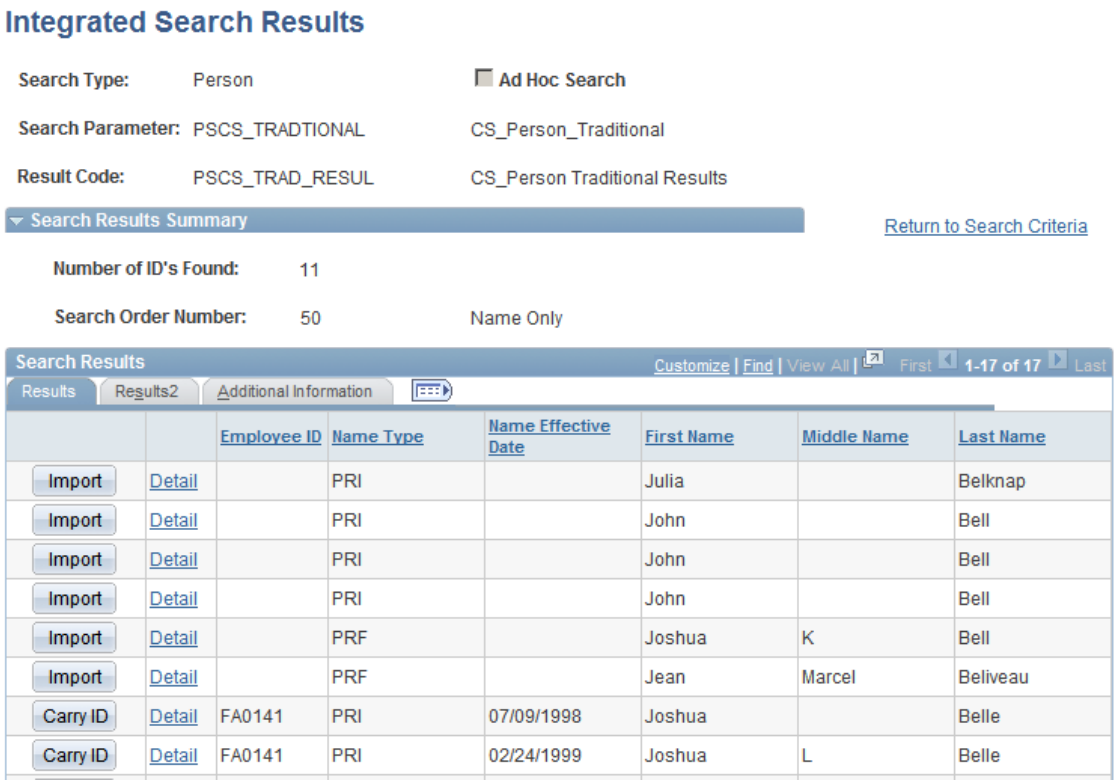
Use the Integrated Search Results page (SCC_SM_RESULTS) to view Search/Match results of an external system search and investigate potential duplicate IDs.

Navigation:

Enter criteria on the Search Criteria page and click **Search** or click one of the search by order number *Selective Search* buttons to launch a manual search.

If the External Search/Match is triggered and the system has found matching candidates on a search rule number lower or equal to the Search/Match, the Integrated Search Results page appears.

This example illustrates the fields and controls on the Integrated Search Results page: Results tab. You can find definitions for the fields and controls later on this page.



Integrated Search Results

Search Type: Person — Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL — CS_Person Traditional Results

Search Results Summary — Return to Search Criteria

Number of ID's Found: 11

Search Order Number: 50 — Name Only

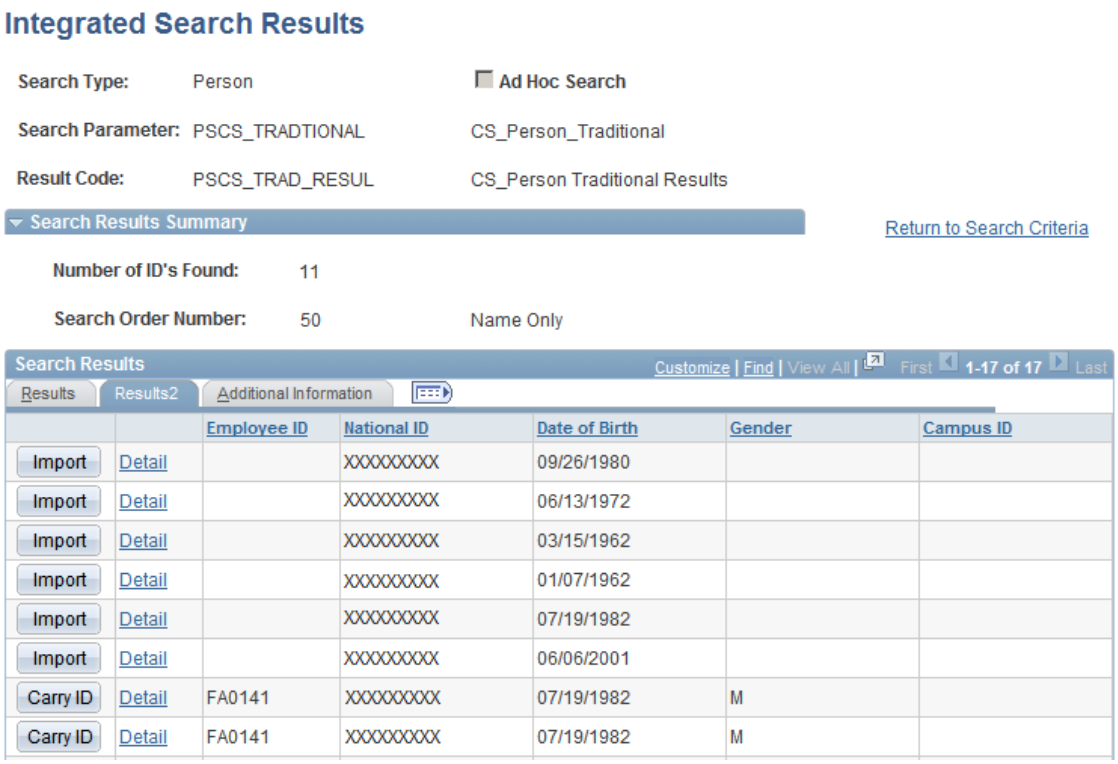
Search Results — Customize | Find | View All | First 1-17 of 17 Last

Results | Results2 | Additional Information

		Employee ID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
Import	Detail		PRI		Julia		Belknap
Import	Detail		PRI		John		Bell
Import	Detail		PRI		John		Bell
Import	Detail		PRI		John		Bell
Import	Detail		PRF		Joshua	K	Bell
Import	Detail		PRF		Jean	Marcel	Beliveau
Carry ID	Detail	FA0141	PRI	07/09/1998	Joshua		Belle
Carry ID	Detail	FA0141	PRI	02/24/1999	Joshua	L	Belle

This example illustrates the fields and controls on the Integrated Search Results: Results2 tab. You can find definitions for the fields and controls later on this page.

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Integrated Search Results

Search Type: Person — Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL — CS_Person Traditional Results

Search Results Summary — Return to Search Criteria

Number of ID's Found: 11

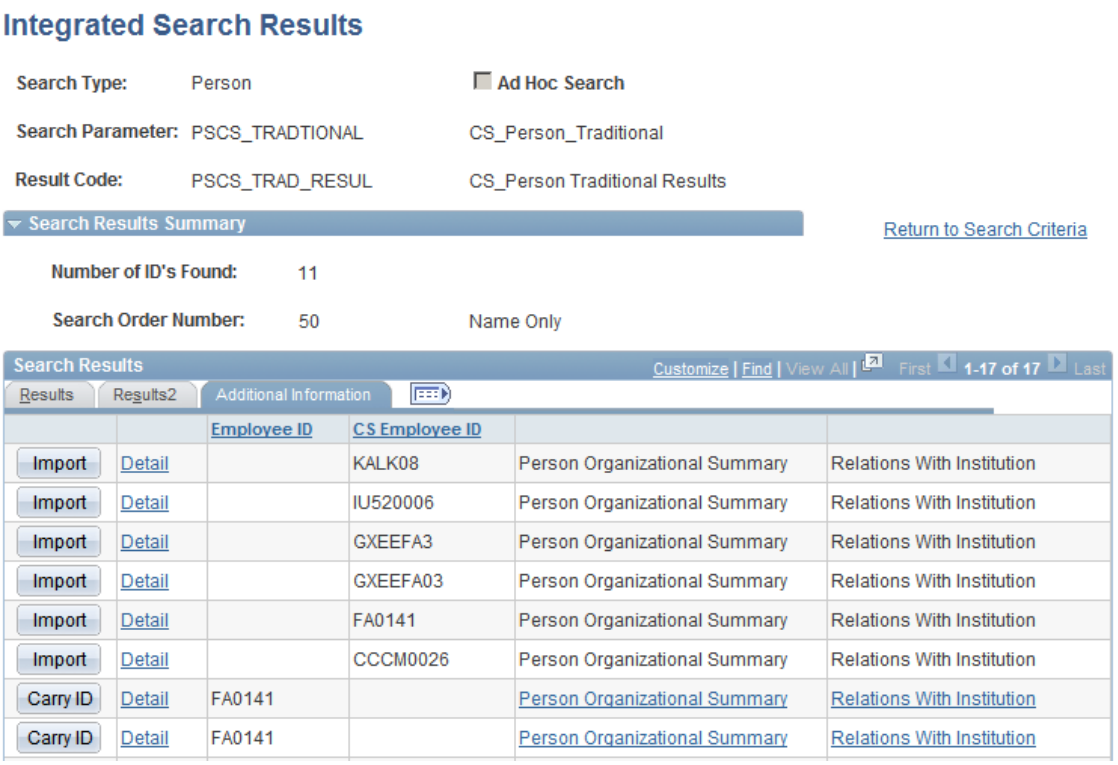
Search Order Number: 50 — Name Only

Search Results — Customize | Find | View All | First 1-17 of 17 Last

Results | Results2 | Additional Information

		Employee ID	National ID	Date of Birth	Gender	Campus ID
Import	Detail		XXXXXXXXX	09/26/1980		
Import	Detail		XXXXXXXXX	06/13/1972		
Import	Detail		XXXXXXXXX	03/15/1962		
Import	Detail		XXXXXXXXX	01/07/1962		
Import	Detail		XXXXXXXXX	07/19/1982		
Import	Detail		XXXXXXXXX	06/06/2001		
Carry ID	Detail	FA0141	XXXXXXXXX	07/19/1982	M	
Carry ID	Detail	FA0141	XXXXXXXXX	07/19/1982	M	

This example illustrates the fields and controls on the Integrated Search Results page: Additional Information tab. You can find definitions for the fields and controls later on this page.



Integrated Search Results

Search Type: Person — Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL — CS_Person Traditional Results

Search Results Summary — Return to Search Criteria

Number of ID's Found: 11

Search Order Number: 50 — Name Only

Search Results — Customize | Find | View All | First 1-17 of 17 Last

Results | Results2 | Additional Information

		Employee ID	CS Employee ID		
Import	Detail		KALK08	Person Organizational Summary	Relations With Institution
Import	Detail		IU520006	Person Organizational Summary	Relations With Institution
Import	Detail		GXEEFA3	Person Organizational Summary	Relations With Institution
Import	Detail		GXEEFA03	Person Organizational Summary	Relations With Institution
Import	Detail		FA0141	Person Organizational Summary	Relations With Institution
Import	Detail		CCCM0026	Person Organizational Summary	Relations With Institution
Carry ID	Detail	FA0141		Person Organizational Summary	Relations With Institution
Carry ID	Detail	FA0141		Person Organizational Summary	Relations With Institution

Many fields on this page are the same as those on the Search Results page. However, there are some important distinctions:

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- Records with no HCM employee IDs appear first in the Search Results group box.
- Records with no HCM employee IDs are assigned an **External Sys ID.**.
- Where an HCM employee ID exists, the **Detail** link accesses a page where you can view details of the ID record from the HCM system.
- Where no HCM employee ID exists, the **Detail** link accesses a page where you can view details of the data from the external system.
- The **Import** button appears when a person meets the criteria in the external system.
- The external system ID column appears based on the settings defined on the Search Match Options for External Systems page. The column heading depends on the **Display Name** that is defined for the *Universal ID* column, in this case *CS Employee ID.*
- Masking configuration is in effect for all matching individuals, even those with no employee ID.
- For matching person records found by External Search/Match, this page displays information that is not necessarily stored inside the external system (for example, Campus Solutions**Aid Year**).

Field or Control	Description
Number of ID's Found	The system displays the total number of distinct IDs returned by both Search/Match and External Search/Match, just Search/Match, or just External Search/Match.
Search Order Number	The system shows the Search Order Number where results were found. When the internal and external searches find results under different search rules, the Results Engine evaluates the **Search Order Number** returned by both searches and displays the results for the search that found results under the smallest search order number (the most restrictive search). When the internal and external searches find results under the same search rule, the Results Engine displays them both.

Search Results

The fields in this group box are similar to those on the Search Results page. The system displays the results returned from both the HCM database and the external system, along with additional data to describe the IDs that are retuned. However, the columns are dynamic and they can refer to personal data information or transaction data information. You define static columns to appear here on the Search Match Options for External Systems page.

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Field or Control	Description
Import or **Carry ID**	The **Carry ID** button appears when an employee ID exists; otherwise the system displays the **Import** button. Security access to the Add/Update Person component controls whether users can use the **Import** button. Click the **Import** button to import external system data when the person does not exist in the HCM system. When you click the button, the system displays a message asking if you want to create the new ID in the system. If you click *Yes*, the system performs a Fetch Request to request the complete constituent record from the external system. When the system receives the Fetch Response from the external system, it uses the personal data in it to create a new employee. After successfully importing the data, the Search Results group box refreshes and the newly created employee appears; the **Import** button for the person row changes to **Carry ID.** Notice that no other import can be performed (all the **Import** buttons are then unavailable). This is to prevent the user from importing multiple matching candidates. If you click *No*, the system does not import any data and returns to the Integrated Search Results page.
Detail	If an HCM employee ID exists, click this link to access the page that is set up inside the **Search Results Code** to view more information about the person. The default page for HCM is Biographical Details (PERSONAL_DATA1). If no HCM employee ID exists for the person, click this link to invoke a Fetch Request to retrieve the complete constituent record from the external system. When the system receives the Fetch Response from the external system, it displays the personal data in the response on the Biographical Details (SCC_SM_RESP_DTL) page. **Note:** Both the **Import** button and the **Detail** link (when no employee ID exists) trigger the same Fetch Request. The data received inside the Fetch Response will only be saved to your database when the Fetch request is triggered from the **Import** button. It is therefore good practice to always review the detailed information prior to importing.

Additional Information

A column with the external system IDs appears on the Additional Information tab when a *Universal ID* static column to display is selected on the Search Match Options for External Systems page. The column heading depends on the **Display Name** defined, in this case *CS Employee ID.*

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Biographical Details Page

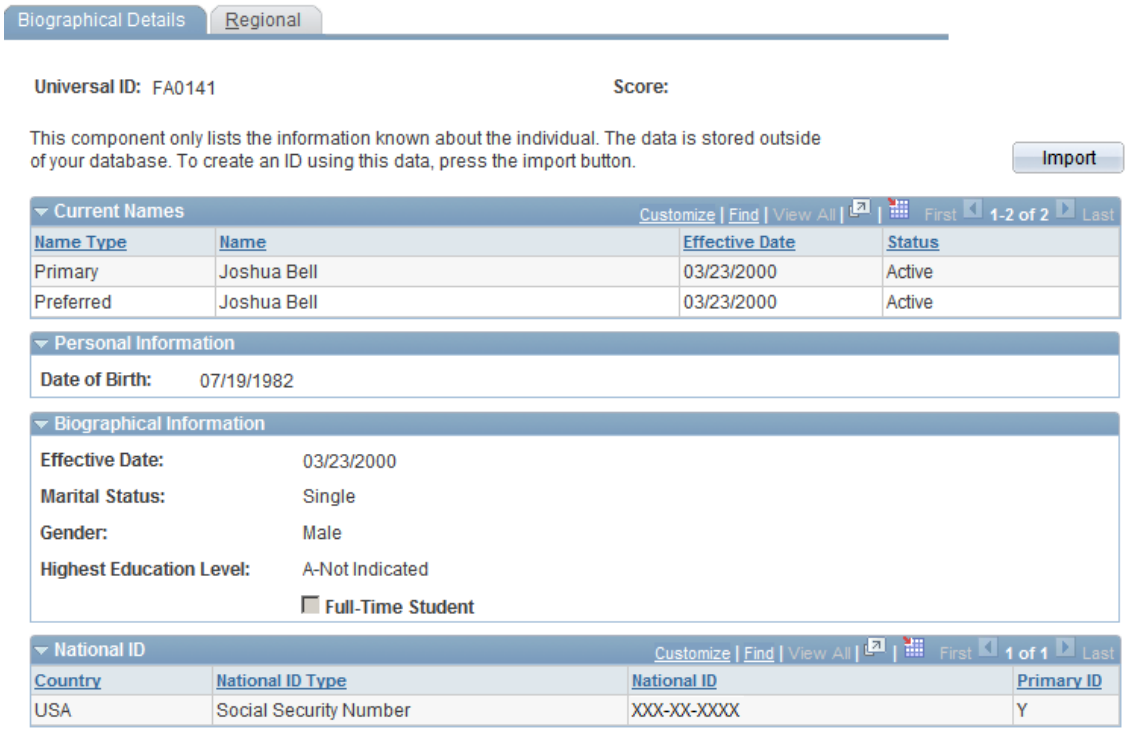
Use the Biographical Details page (SCC_SM_RESP_DTL) to view personal data stored inside the external system.

Navigation:

Click the **Detail** link on the Search Results page for a matching candidate that does not have an emplID.

> **Note**
>
> The sample component shown is Biographical Details (SCC_SM_RESP_DTL), which is accessed by clicking the **Detail** link for an individual with no HCM employee ID.

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

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Phone Numbers — Customize | Find | View All | First 1-2 of 2 Last

Phone Type	Telephone	Phone Extension	Country Code	Preferred
Main	301/897-4094			Y
Other	301/897-4094		001	N

Current Addresses — Customize | Find | View All | First 1-3 of 3 Last

Address Type	Address	Effective Date	Status
Permanent	585 Harrogate Road Pittsburgh, PA 15241	02/02/1998	Active
Mailing	37 Van Reypen Rd Bethesda, MD 20814	03/23/2000	Active
Home	ADDRESS1 ADDRESS2 ADDRESS3	02/24/1999	Active

Missing Information

No Email Address Information

No Regional Information

This page displays sections of data that are not stored in the HCM database until you click the **Import** button.

The system displays messages on this page based on the following conditions:

> **Note**
>
> Where no data exists, the system hides the fields and displays a message in the Missing Information group box.

Data Region	Condition	Message
Current Names	No name information exists	No Current Name Information
Personal Information	No personal information exists	No Personal Information
Biographical Information	No biographical information exists	No Biographical Information
National ID	No national ID information exists	No National ID Information
Email Addresses	No email address information exists	No Email Addresses Information
Phone Numbers	No phone information exists	No Phone Number Information
Current Addresses	No address information exists	No Address Information
Regional	No regional data exists	No Regional Information

Field or Control	Description
Import	Click this button to import the external system ID and all the information displayed, into the HCM system and create an emplID.

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Current Names

Field or Control	Description
History	This link appears only if the external system ID contains a past or future date in addition to the current row. Click the link to access the Name Type History page.

Current Addresses

Field or Control	Description
History	This link appears only if the external system ID contains a past or future date in addition to the current row. Click the link to access the Address Type History page.

Regional Page

Use the Regional page (SCC_BIO_DEMO_REG) to view regional data stored inside the external system.

Navigation:

Click the **Detail** link on the Integrated Search Results page then Regional tab.

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



This page is available only if it contains data. If the fetch response contains no regional information, this message appears on the Missing Information group box on the Biographical Details page.

Data Region	Condition	Message
Regional	No regional data exists	No Regional Information

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10

Setting Up and Working with Languages

Understanding Language Support in PeopleSoft

A key part of any multiple-country system is language support. PeopleSoft streamlines the process of using multiple languages. For example, to change from one language to another during a session, you change the contents of only one field, and the system changes to the new language. You can change from German to English to French and back to German all in one session. This section introduces you to language support in PeopleSoft.

PeopleSoft uses several methods to ensure full multilingual capabilities. PeopleTools contains built-in ways of translating field labels, page displays, and menu items. When you log in to the system, everything appears in your language of preference, assuming that it has been translated.

If you modify PeopleSoft by adding new fields, pages, or menu items, you can use the built-in PeopleTools capabilities to translate those items into your supported languages.

To maintain full language capability when you modify your application, you enter translations of any new items. If you use only one language and enter new items in that language, that's fine. However, if you use more than one language and you do not translate the new items, they appear in your original language, even when you change to another language. Then you may see more than one language on your page.

> **Note**
>
> The translation of objects that we deliver is performed once, before we distribute the system, and includes all the pages and menu items that are in the application. However, you must translate new field labels and any data—names, comments, long descriptions, and short descriptions—for each new record that you create or in the data that you add.

For more information about language support in PeopleSoft, see PeopleSoft Supported Languages and Delivered Translations (Doc ID 2989920.1) and *PeopleTools: Global Technology*.

Setting Language Preferences

These topics discuss setting up language preferences.

> **Note**
>
> PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view a PeopleSoft application in any supported language.

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Using the Language Preference Page

PeopleSoft enables you to view a Foreign Language sign-on page for each language that is supported by the system. Because you are viewing PeopleSoft pages through an internet browser, you must be sure that the browser accepts the language that you want to use. Check the language preferences of your browser to select the correct options.

Once setup is established, click the Language Name button to view the sign-on page in the specified language. The language you select determines the language in which the entire application is displayed in the PeopleSoft Internet Architecture.

> **Note**
>
> The Language Code used in My System Profile page (USER_SELF_SERVICE) is applied only when you run reports and produce emails.

Using the International Preferences Page

After you log in to a PeopleSoft application, you can change your language preference anytime during your session on the International Preferences page. When you change your language preference, everything appears in the new language, assuming that it's translated. If you change your language of preference, the language code change isn't written to the database, but is stored in PeopleTools memory for the duration of the current session.

The language code you indicate is the language that the system uses for future pages that are displayed during the current session. This is the language of the session until you either log off or change your language preference. The tool set uses the language code to apply country-specific formats for numbers, dates, and currencies. If you change the language code during a session, your user profile language preference is not affected. The next time you log in, you'll see the language that is associated with your user ID.

Making a change means that everything you see—pages, menus, and field contents—appears in your new language preference.

> **Note**
>
> Your PeopleSoft language selection is independent of your Windows language options. To change your Windows language parameters, select Start, Settings, Control Page.

See *PeopleTools: Global Technology* and *PeopleTools: Security Administration*.

Working with Alternate Character Sets

These topics provide an overview of alternate character system architecture and discuss how to:

- Configure your system for alternate character functionality.
- Enter alternate character information.

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- Find records using phonetic searching.
- Work with alternate character system architecture.

Understanding Alternate Characters

PeopleSoft HCM uses related language table architecture to enable users to use multiple languages to enter data and to switch between a base language table and a related language table to view information in multiple languages. In addition, it uses alternate character system architecture to enable users to use two character sets for one language.

The alternate character system architecture accommodates languages (such as Chinese and Japanese) that require the entry of proper nouns by using two character sets to support phonetic sorting rather than binary sorting on proper nouns. For example, users who enter data in Japanese require functionality that enables them to enter proper nouns (such as names or descriptions) both in Kanji and by using a phonetic character set. To accomplish phonetic sorting in PeopleSoft HCM, configure your system so that the user can enter Japanese proper nouns twice: once in Kanji and once (phonetically) using Katakana, Hiragana, or roman alphabets also known as Romaji.

Important

(JPN) In choosing which phonetic character set to adopt, it is important for customers to determine a consistent method for entering phonetic character set information. From a technical perspective, the system simply applies a binary sort method to phonetic characters. Thus, different characters with the same pronunciation aren't sorted together by their pronunciation in PeopleSoft HCM. For example, a Hiragana *Ma* character is sorted before a Hiragana *Mi* character and after a Hiragana *Ho* character. If a Katakana *Ma* character is included in the sort, it is sorted after a Katakana *Mi* character and appears only after all the Hiragana characters are sorted.

(CHN) As Chinese government adopts an official method of romanizing Chinese characters, also known as Hanyu Pinyin, it is strongly advised to use Alphanumeric (roman alphabets) as the alternate character set.

See *PeopleTools: Global Technology*.

Understanding Alternate Character System Architecture

For certain names, addresses, and description fields in PeopleSoft HCM, there is a corresponding alternate character field that is part of the record. This architecture enables the users to enter the same proper nouns using two character sets.

Alternate Character Fields Associated with Global Pages

The following table lists the alternate character fields and the global pages with which they are associated in PeopleSoft HCM.

Page	Auxiliary Page	Field	Comments
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	
COMPANY_TABLE1	COMPANY_ACDESCR_SEC	DESCR_AC	

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Page	Auxiliary Page	Field	Comments
COMPANY_TABLE1	COMPANY_ACADDR_SEC	COMPANY_ACADDR_SBP	COMPANY_TBL.CITY_AC COMPANY_TBL.ADDRESS1_AC COMPANY_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
DEPEND_BENEF1	DEPENDBN_ACNAME_SEC	NAME_AC	
ESTAB_TBL1_GBL	ESTAB_ACDESCR_SEC	DESCR_AC	
ESTAB_TBL1_GBL	ESTAB_ACADDR_SEC	ESTAB_ACADDR_SBP	ESTAB_TBL.CITY_AC ESTAB_TBL.ADDRESS1_AC ESTAB_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN
HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACADDR_SEC	PERSDTA_ACADDR_SBP	PERS_DATA_EFFDT.CITY_AC PERS_DATA_EFFDT.ADDRESS1_AC PERS_DATA_EFFDT.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACNAME_SEC	NAME_AC	
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_TBL1	TRN_INS_ACNAME_SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_SEC	NAME_AC	

Search Records with Alternate Character Name Fields

The following PeopleSoft HCM search records that have NAME_AC (alternate character name) as an alternate search key or subrecords that are included in search records, enable for Japanese input and display:

- NAMES
- NAMES_SS_TMP
- NE_INCIDNT_SRCH

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- NE_PERSONAL_DTA
- OPR_ROWS_EE
- OPR_ROWS_EE2
- PERSON_NAME
- PERS_SRCH_ALL
- PHYSICIAN_SRCH
- PHYSICIAN_SRCH2
- SHS_EMPL_TAO
- SHS_EXEMPT_TAO
- SSF_PERSON_VW
- SUCCESS_TR_SRCH
- TRN_DMNDEE_SRCH
- TRN_INSTR_SRCH
- UPG_NAMES_TAO
- WCS_NAME_SCH_VW
- WF_PERSON_NAME
- WORKER_PROMPT

> **Note**
>
> This list includes only Human Resources system records.

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

The following reports in PeopleSoft Human Resources sort on the Name field or on the Alternate Character Name field when the system base language and the report language are configured as shown:

Base Language Set To	Report Language Set To	Report Sorted By
English	Japanese	BASE.NAME_AC
Japanese	Japanese	BASE.NAME_AC
English	English	BASE.NAME
Japanese	English	BASE.NAME

SQR/BI Publisher Reports

These SQR/BI Publisher reports are sorted phonetically for Japanese, based on the report and the base language configuration:

Report ID	Description
PER001	Department Action Notices
PER002	Employee Birthdays

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Report ID	Description
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes
PER020	Employee Home Address Listing
PER023	Salary History
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

> **Note**
>
> This list doesn't include country-specific regulatory reports that are sorted by Name.

Configuring Your System for Alternate Character Functionality

This topic explains how to set up alternate character functionality in PeopleSoft HCM.

To set up alternate character functionality in PeopleSoft HCM:

1. Link the alternate character sets with language codes on the Installation Table - Alternate Character page (ALT_CHAR_TBL).

   These settings affect your entire PeopleSoft HCM installation.

   > **Note**
   >
   > On this page, you define the alternate character set for the language that each user selects on the sign-on page.

2. Enable the alternate character functionality for specific user IDs on the Org Defaults by Permission Lst page (OPR_DEF_TBL_HR).

   When you enable alternate character functionality for a user, the system displays the alternate character button to the right of all the fields on the Global menus that have an associated Alternate Character field.

   When you click the Alternate Character button, the system opens a page where you enter or display the field value in the alternate character set.

Entering Alternate Character Information

On pages on the global menus in PeopleSoft Human Resources, you can access the alternate character fields for proper noun fields like Name, City, and Company Description. To access

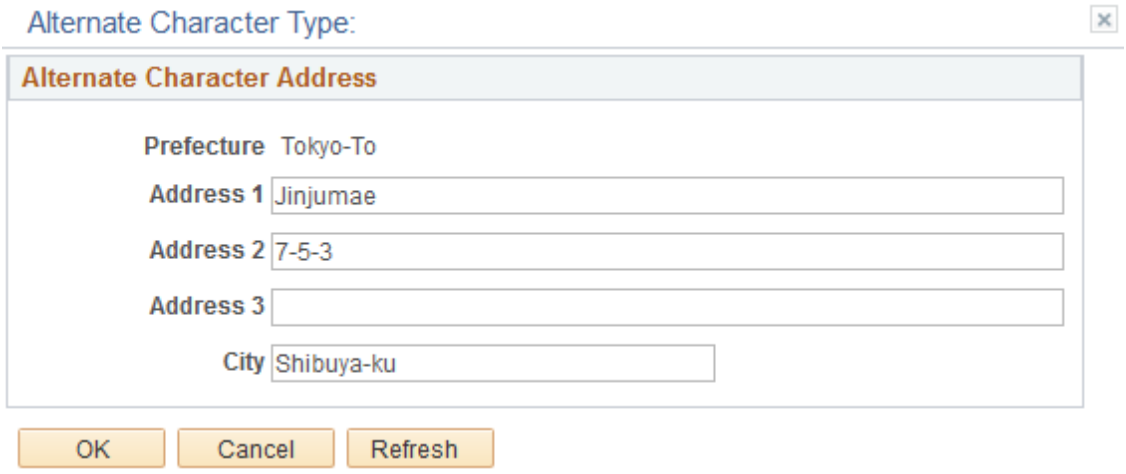
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these fields, click the Alternate Character button that appears to the right of a field that has a corresponding Alternate Character field available.

> **Note**
>
> *(CHN), (HKG)* and *(JPN)* On the Name page, when the Format for Country is *CHN, HKG* or *JPN,* the Name and the Alternate Character Name fields appear on the page: You can enter information in both fields directly on the Name page. On the Address page, click a button to access the alternate character secondary page. Whether the Alternate Character button appears on the Address page depends on the user ID's permission list and whether the particular page has Alternate Character functionality.
>
> *(CHN)* When the Format for Country is *CHN,* the First Name and Last Name fields have values with alphanumeric characters, and you leave Alternate Character Name blank, the system populates Alternate Character Name using Last Name, space delimiter, and First Name. Please note that this functionality works only if Alternate Character Name has no existing value.

If you click the **Alternate Character Address** button in the Address History secondary page (ADDR_HISTORY_SEC), the system opens the Alternate Character Address page, such as the example that follows, where you can enter any proper noun information, such as street and city, in the designated alternate character set.

This example illustrates the an example of an Alternate Character Type page.



> **Note**
>
> If you sign in to the application using a language for which you specified an alternate character type, the system displays that character type in the title bar of the Alternate Character Type page. In the example above, Alphanumeric is the alternate character type defined for English.

Once you enter alternate character information into an alternate character field and click **OK** to close the page, the system changes the appearance of the Alternate Character button on the

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page to indicate that alternate character information is available for the primary proper noun field on the main page.

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding a person and updating or adding information to the people's records in the system. Even if you enter a person's name using ideograms such as Chinese characters and Japanese Kanji, you can specify the name phonetically as a search criterion.

For example, to look up Japanese employee Noriko Kawamoto's personal data record, place the cursor in the **Alternate Character Name** field, enter the Japanese phonetic characters for *Kawa,* and click **OK**. The list box on the search record page displays all the names (sorted phonetically) that begin with *Kawa* such as *Kawasaki, Kawashima* or *Kawamoto* in both Kanji and Kana.

> **Note**
>
> The phonetic value is the same as the base name value.ain

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11

Setting Up and Working with Currencies

Understanding Currency

If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

Understanding currency in PeopleSoft is a two-part process:

- Understanding the mechanics of defining currency codes, types, exchange rates, and base currency, which are universal to HCM.
- Understanding how some of the PeopleSoft HCM applications use this information. For example, PeopleSoft Global Payroll has extensive, application-specific currency functionality. For details of application-specific currency issues, see the application-specific documentation.

> **Note**
>
> Currency setup that is universal to PeopleSoft applications is discussed in other documentation.

Related Topics

- Enterprise Components: Understanding Currencies and Market Rates

Configuring Currency Precision

These topics provide an overview of currency precision and discuss how to:

- Activate currency precision.
- Report with currency precision.
- Expand a database for currency precision.

Understanding Currency Precision

According to the ISO standard, currency precision can range from no decimals to 3 decimals. For example, U.S. dollar amounts have 2 digits to the right of the decimal; Japanese yen have none. To support this dynamic currency precision, PeopleSoft delivers all of its currency-sensitive amount fields with a standard length of 13.2; that is, 13 digits to the left of the decimal and 2 digits to the right. Optionally, with some modification, you can expand these amount fields in your system to a maximum of 15.3 digits. There is a controlled currency on the same record to control the display and processing of such amount fields.

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PeopleSoft rounds all currency-sensitive amount fields to the currency precision of the controlled currency during all online or background processes. For example, in a database containing amount fields with a length of 15.3, Japanese yen are rounded to 123.000 and U.S. dollars are rounded to 123.230. The system doesn't place a nonzero amount after the decimal for a Japanese amount or after the second digit to the right of the decimal for a U.S. amount.

PeopleSoft displays the amount fields on the online pages with the proper precision. For example, it displays Japanese yen as 123 and U.S. dollars as 123.23. When entering an amount, you can't enter more than the defined precision; if you do, the system treats the entry as an online error.

PeopleCode programs and background processes round all currency-sensitive amount fields to the currency precision of the controlled currency.

Activating Currency Precision

Currency precision is a PeopleTools option; selecting this option activates all of its features. With the option turned off, the system displays amount fields as defined in PeopleSoft Application Designer and rounds them to the number of decimals defined there.

Activate the PeopleTools multicurrency option on the PeopleTools Options page (PSOPTIONS) by selecting the Multi-Currency check box. PeopleTools will then use the precision you specify in the Currency Code page (CURRENCY_CD_TABLE) for the currencies relating to monetary fields for which you have specified currency control fields. Some PeopleSoft applications are shipped with the Multi-Currency check box selected. You can change that default.

> **Note**
>
> Once you deselect the **Multi-Currency** check box, selecting it again does not automatically round the existing transaction amounts. If you deselect the **Multi-Currency** check box, PeopleSoft supports only the default amount field size of 13.2. It does not support the larger amount field size of 15.3.

Reporting with Currency Precision

Most PeopleSoft SQR reports display the currency-controlled amounts to the number of decimals that are defined by the associated currency. For example, a Japanese yen amount appears on a report as *123* and a U.S. dollar amount appears as *123.23.*

For reporting with BI Publisher and PS/nVision (Excel), the amount appears as a 2-decimal number. You have to modify the reports if you want to show 3 decimals on these reports.

Our third-party reporting tools don't fully support numeric fields that are greater than 15 digits. PS/nVision (Excel) uses an 8-byte float for numeric fields. This causes truncation after the fifteenth digit. BI Publisher displays up to 16 digits correctly; for numbers that are greater than 16, BI Publisher starts to insert nonsensical numbers into the decimal positions; however, this is a problem only with very large numbers. For any of these reporting tools, you should have accurate results up to the following amounts:

- Hundreds of trillions of yen (or lira): Precision = 0
- Trillions of dollars: Precision = 2
- Hundreds of billions of dinar: Precision = 3

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For example, if you enter 2s into a 15.3 numeric database amount field, the following third-party reporting tools will display the value as:

Number of Digits	Reports	PS/nVision (Excel)	SQR
16	2,222,222,222,222.222	2,222,222,222,222.220	2,222,222,222,222.222
17	22,222,222,222,222.219	22,222,222,222,222.200	22,222,222,222,222.220
18	222,222,222,222,222.188	222,222,222,222,222.000	222,222,222,222,222.200

Expanding a Database for Currency Precision

With some PeopleSoft applications, you can expand your database from the original amount field size of 13.2 digits to 15.3 digits. For example, the PeopleSoft application supports the larger field size of 15.3 across the PeopleSoft Financials, Distribution, and Manufacturing applications.

To expand your database:

1. Back up your database (optional).

   Although this step is optional, we highly recommend it. This way, you can recover your database if you experience any database integrity problems during the remaining steps.

2. Run Audit scripts.

   Run DDDAudit and SYSAudit from PeopleSoft Process Scheduler to ensure that the database is clean. Select PeopleTools, Process Scheduler, System Process Requests and enter a *Run Control ID.* Click **Run.** Specify the *Server* name of your environment, and select *DDDAUDIT* (and then *SYSAUDIT)* from the list of processes. Click **OK** to run the processes.

3. Review the script output to ensure a clean database.

   Locate the DDDAudit and SYSAudit reports in your environment, and review them to ensure that the database is clean.

4. Run FSINTLFD.DMS to populate the international field size table.

   Once the database is clean, run the script FSINTLFD.DMS to populate the international field size table INTL_FLDSIZ_TBL. Use DataMover to run this script. The system populates the international field size table with all the amount fields that have the controlled currency that is specified in Application Designer. The system calculates the new length by adding 2 digits to the left of the decimal and 1 digit to the right of the decimal. Before the system inserts new fields into the international field size table, it deletes all existing fields from the table.

5. Verify the results by reviewing the International Field Size page.

   Select the International Field Size page. The Field Size - International column displays *15.3* for most of its fields. When compared with the Current Field Size, the values in the Field Size - International column should be 2 digits greater to the left of the decimal and 1 digit greater to the right of the decimal. In other words, a Current Field Size value of *13.2* should correspond to a *15.3* value in the Field Size - International column.

6. Run the PeopleTools process TLSINST1.SQR to change the field size on PSDBFIELD.

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> **Note**
>
> This SQR is also an application engine. You can access it on the **PeopleTools**, and then **Utilities**, and then **International**, and then **Process Field Size** page.

Using SQRW, run PeopleTools SQR TLSINST1.SQR to change the field size on the PeopleTools table PSDBFIELD. This changes the PeopleTools definition values, but not the database field size.

It also creates a report (TLSINST1.LIS) that lists all the pages that use Average or Maximum size page fields. As a standard of PeopleSoft Enterprise, all monetary amount fields use a Custom field size to avoid the overlapping of fields when the amount fields are expanded. Review the list of pages and make any adjustments that are necessary to preserve readability.

7. Review SQR.LOG for errors.

   The SQR log is created in C:\TEMP, unless otherwise specified. View the log to ensure that the field size value has been changed to *15.3.* Verify the result by randomly checking the field size, opening the various records containing amount fields shown in step 5. As you build the project, executing scripts to SQL alter tables, creating views, and indexing, closely monitor the execution of the scripts and review the error log.

8. Use SQL Alter all tables.

   a. Select **PeopleTools**, and then **Application Designer**, and then **File**, and then **New**, and then **Project.**

   b. Select **File**, and then **Save Project As.**

   c. Save the Project Name as *CURR_TBL.*

   d. Select Insert, Objects into Project.

   e. Select Object Type: Record and Type: Table.

   f. Click **Insert** under Record Name. The system displays a list of all the tables being populated.

   g. Click **Select All,** and click **Insert** again; click **Close** to close the page.

   h. Select Build, Project.

   i. In the Build Options group box, select **Create Indexes** and **Alter Tables.**

   j. Under Build Execute Options, be sure that the *Build* script file is selected.

   k. Review the script file with your database administrator (DBA), and execute the file using your recommended SQL query tool.

9. Use SQL Create all views.

   a. Select **PeopleTools**, and then **Application Designer**, and then **File**, and then **New**, and then **Project.**

   b. Select **File**, and then **Save Project As. Save** the Project Name as *CURR_VW.*

   c. Select Insert, Objects into Project. Select Object Type: Record and Type: View/Query View.

   d. Click **Insert** and then click **Select All.**

   e. Click **Insert** again; then click **Close** to close the page.

   f. Select Build, Project.

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g. In the Build Options group box, select **Create Views.**

h. Under Build Execute Options, select the Build script file.

i. Review the script file with your DBA, and execute it using your recommended SQL query tool.

10. Run Audit scripts again.

    Run DDDAudit and SYSAudit again to make sure that the database is clean.

11. Manually change reports.

    PeopleSoft has enhanced most SQR reports to accommodate 15.3 amount fields. However, some of them are too crowded, and their amount field sizes remain 13.2. If the last digits of the decimals are important to you, update the SQR to 12.3 to display 3 decimals on the report. Following is a list of reports that require manual changes by application to accommodate the third digit of the decimal:

Field or Control	Description
General Ledger	GLS1001, GLS1003, GLS7000, GLS7009, GLS7010, and GLS7012
Receivables	AR30001 (9.2), AR30002 (9.2), AR30003 (9.2), and AR30004 (12.2)

See *PeopleTools: Global Technology*.

Viewing Multiple Currencies

To open the Display in Other Currency page, click the **Display In Other Currency** button on any page that supports multicurrency.

Many of the pages that display earnings or amounts in one currency enable you to view the amounts in another currency. This is an integral feature of the PeopleSoft Economic and Monetary Union (EMU) support and it enables you to view conversions across all currencies that are supported by the system.

Viewing Information About Current Exchange Rate Calculations

The Exchange Rate Detail page displays information about the current and historic exchange rates, the **From** currency, the **To** currency, and the **Rate** of exchange that you used in your currency conversion. Click **Return** to return to the Display In Other Currency page.

Running Currency Setup Reports

This topic lists the pages used to run currency setup reports.

Pages Used to Run Currency Setup Reports

Page Name	Definition Name	Usage
Currency Rate Report - Run Control Page	PRCSRUNCNTL	Run the Currency Rate Table report (PER714) prints information about exchange rates.

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Page Name	Definition Name	Usage
Currency Code Table - Run Control Page	PRCSRUNCNTL	Run the Currency Code Table report (PER713) prints information about each currency defined in your Currency Code table.

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Setting Up and Working with Frequencies

Understanding Frequency IDs

These topics discuss:

- Frequency IDs.
- Frequency with compensation rates.
- Frequency with payroll calculations.

Frequency IDs

Frequency IDs are used in PeopleSoft Human Resources, Global Payroll, and Payroll for North America. Frequency IDs are defined on the Frequency Table component (FREQUENCY_TBL). Each frequency ID has a frequency type and an associated annualization factor that represents the number of times that the period occurs in the course of a year.

In PeopleSoft HCM, you use frequency IDs to define the periods of time in which compensation is quoted, standard hours are completed, and people are paid, to list a few examples.

PeopleSoft delivers a set of standard frequencies that are PeopleSoft-maintained. You can define additional, customer-maintained frequencies for nonstandard periods. For example, you could define a monthly-type frequency with a nonstandard annualization factor of 13 to represent 13 monthly periods in a year

PeopleSoft-Maintained Frequencies

PeopleSoft delivers and maintains the following frequency IDs in the Frequency Table component:

Frequency ID	Description	Frequency Type	Annualization Factor
A	Annual	Annual	1
B	Biweekly	Biweekly	26
BMX30	Biweekly Mexico Factor 30.0	Biweekly	25.7142857
BMX34	Biweekly Mexico Factor 30.4	Biweekly	26.0571428
C	Contract	Contract	1
D	Daily	Daily	260
D365	Diaro 365 dias	Daily	365
D426	Daily 14 Payments	Daily	426
DAR30	Daily Argentina Facto 30.0	Daily	360

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Frequency ID	Description	Frequency Type	Annualization Factor
DMX30	Daily Mexico Factor 30.0	Daily	360
DMX34	Daily Mexico Factor 30.4	Daily	364.8
F	Every four weeks	Every four weeks	13
H	Hourly	Hourly	Use Standard Hours for Annualization
HMX30	Hourly Mexico Factor 30.0	Hourly	2880
HMX34	Hourly Mexico Factor 30.4	Hourly	2918.4008
JM	Japan Monthly	Monthly	12
M	Monthly	Monthly	12
M13	Monthly 13 payments	Monthly	13
M14	Monthly 14 payments	Monthly	14
Q	Quarterly	Quarterly	4
S	Semimonthly	Semimonthly	24
SMX34	Semimonthly Mexico Factor 30.4	Semimonthly	24.32
W	Weekly	Weekly	52
WMX30	Weekly Mexico Factor 30.0	Weekly	51.4285714
WMX34	Weekly Mexico Factor 30.4	Weekly	52.1142857

Frequency with Compensation Rates

When you associate frequency with compensation rates, you define the time period on which the compensation is based. For example, you might state a worker's base salary as 60,000 a year (annual frequency) or 5,000 a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or individual job records, the system uses the annualization factor that is associated with this frequency to convert the compensation to other frequencies.

When you set up PeopleSoft Human Resources, you can define default compensation frequencies at several levels. You can usually change that default value when the system enters it into other pages.

This table lists important pages on which compensation frequencies are either specified or used:

Component or Page	Default Compensation Frequency Value
Default Frequencies page (DFLT_FREQUENCY)	Specify default frequencies for each country and specify the order in which the system uses them to display base pay compensation in the Pay Rates group box on the Compensation page of the Job Data component.

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Component or Page	Default Compensation Frequency Value
Compensation page (JOB_DATA3) of the Job Data component (JOB_DATA)	Displays base pay compensation information in the frequencies that are specified for the country on the Default Frequencies page
HCM Options page (INSTALLATION_TBL1B) of Installation Table component (INSTALLATION_TBL)	Set a default compensation frequency and a default work period for your organization. The system enters these default values in the Job Code table.
Job Code Profile page (JOBCODE_TBL1_GBL) of Job Code component (JOB_CODE_TBL)	Default compensation frequency and default work period values are taken from the Installation table.
Comp Rate Code Table component (COMP_RATECD_TBL)	Specify rate code frequencies on the Comp Rate Code table. The system enters these default values when you select the rate code in a pay components group box (found on a number of pages in PeopleSoft HCM). You can also specify here whether the FTE (full-time equivalency) calculation should be applied to the compensation associated with the rate code.
Define Salary Plan component (SALARY_PLAN_TABLE)	Specify default frequency for components of pay assigned to salary steps.
Pay Group Table component (PAYGROUP_TABLE)	Specify daily and monthly frequencies for the pay group. The system uses the frequency information to calculate pay rates.

Related Topics

- Classifying Jobs
  To classify jobs, use the Define Job Code component (JOB_CODE_TBL). Use the CI_JOB_CODE_TBL component interface to load data into the tables for this component.
- PeopleSoft Human Resources Administer Compensation: Setting Up Rate Codes

Frequency with Payroll Calculations

Global Payroll and Payroll for North America use frequency to define how often certain events happen.

Global Payroll uses frequency IDs when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, Global Payroll also uses frequency defined on the Generation Control Frequency page (GP_GCTL_FREQUENCY).

Payroll for North America uses frequency IDs to define pay period frequency and to calculate pay rates and proration of pay.

Related Topics

- Understanding Frequency in Global Payroll
  PeopleSoft Global Payroll uses frequency when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, PeopleSoft Global Payroll also uses frequency defined on the Generation Control Frequency component.
- Understanding Frequency in Payroll for North America
  These topics discuss:

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Understanding Frequency in Compensation Rate Conversions

These topics discuss:

- Factors applied to the compensation rate.
- Conversion of compensation rates to different frequencies.
- Job Data pay rate frequencies.

Factors Applied to the Compensation Rate

PeopleSoft HCM calculates and displays compensation rates in the hourly, daily, weekly, monthly, and other frequencies using standard frequency conversion formulas. Depending on the frequency being converted, the system performs the calculations by applying one or more of the following to the compensation rate:

- Compensation frequency annualization factor.
- Job standard hours.
- Standard work period frequency annualization factor.
- FTE (full-time equivalency) factor.

Frequency Annualization Factor

Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in the course of a year.

See Frequency IDs.

Standard Hours and the Standard Work Period

When converting hourly compensation rates, the frequency conversion calculations use the job standard hours and the standard work period. Job standard hours define how many hours the worker should work in the job. The standard work period defines the work period in which the standard hours should be completed. You define the standard work period by selecting a frequency ID (and its annualization factor) as defined on the Frequency Table component.

You define the standard hours and the standard work period on the following pages:

Component	Page	Assignment Level
Installation Table	HCM Options	Values for an organization
Org Defaults by Permission Lst (OPR_DEF_TBL_HR)	Settings (OPR_DEF_TBL_HR2)	Values for a primary permission list
Position Data (POSITION_DATA)	Description (POSITION_DATA1)	Values for a position
Define Salary Plan	Salary Plan Table (SALARY_PLAN_TABLE)	Values for a salary plan
Job Code	Job Code Profile	Values for a job code
Job Data	Job Information (JOB_DATA_JOBCODE)	Values for an employee
Job Openings (HRS_JOB_OPENING)	Job Opening (HRS_JOB_OPENING)	Values for an employment application

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The minimum and maximum standard hours values and the standard work period defined on the Business Unit HR Defaults page (BUS_UNIT_OPT_HR) are used for validation edits in the Job Data and Position Data components.

Defaults for Standard Hours and Standard Work Period

The system inserts the standard hours and the standard work period as default information only if both are defined. The following table describes the source of defaults in Job data under the specified conditions:

Condition	Default Source
You assign the worker a salary plan.	Salary Plan Table page
You assign the worker to a position.	Description page of the Position Data component
You assign the worker a job code.	Job Code Profile page of the Job Code component
You didn't indicate standard hours on the Salary Plan table, Job Code table, or Position Data table.	HCM Options page of the Installation component

Full-Time Equivalency

Full-time equivalency (FTE) is the percentage of full time that a worker should normally work in a job. In calculating the FTE, the system uses your definition of the standard hours and the standard work period.

If you select *Apply FTE* for a compensation component, PeopleSoft Human Resources uses the standard hours and the standard work period to compute FTE to prorate holiday hours and pay for part-time and hourly workers.

> **Note**
>
> (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to prorate holiday hours and pay for part-time and hourly workers.

PeopleSoft Human Resources calculates FTE using the product of the standard hours of the job multiplied by the annualization factor of the job's standard work period which is then divided by the product of the default standard hours multiplied by the annualization factor of the default full time standard hours work period, as shown in this equation:

$$FTE = \frac{\text{(Job Std. Hrs) x (Annualization Factor of Job Std. Work Period)}}{\text{(Default Full Time Std. Hrs) x (Annualization Factor of Default Full Time Std. Work Period)}}$$

In this equation, the default full-time standard hours and default full-time standard work period are from:

- The Salary Plan component (if a salary plan is defined for the worker, and if both standard hours and standard work period are defined for this salary plan).

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- The Org Defaults by Permission Lst component (if no salary plan is defined for the worker, and if both standard hours and standard work period are defined in the Org Defaults by Permission Lst component).

Conversion of Compensation Rates to Different Frequencies

The system converts compensation rates to daily, monthly, and other frequencies using standard formulas. The formula for converting to or from an hourly rate takes the standard hours and standard work period into account.

The system performs compensation rate conversions as follows:

1. Finds or calculates the annual rate for compensation.
2. Divides the annual rate using de-annualization conversion calculations to calculate the rate at the desired frequency.
3. Multiplies the converted compensation rate by the FTE factor if **Apply FTE** is selected for the pay component.

> **Note**
>
> (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to multiply the converted compensation rate.

Annualized Rate Calculations

The system uses the following formulas to convert compensation rates to an annual frequency:

Original Frequency	Formula for Conversion to Annual Frequency
Hourly	Annual Rate = Comprate × Job Standard Hours × Frequency Annualization Factor of Standard Work Period
Monthly, daily, and other	Annual Rate = Comprate × Frequency Annualization Factor

De-Annualized Rate Calculations

The system uses the following formulas to convert compensation rates from an annual frequency to another frequency:

Non-Annual Frequency	Formula for Conversion from Annual Frequency
Hourly	Hourly Rate = Comprate / (Job Standard Hours × Frequency Annualization Factor of Standard Work Period)
Monthly, daily, and other	Non-Annual Rate = Annual Comprate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following job data information:

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Employment Variables	Values
Comprate (hourly)	10
Job Standard Hours	35
Frequency Annualization Factor of Standard Work Period	52
Frequency Annualization Factor of Month	12

The following table shows how the system calculates Teresa Johnson's monthly FTE (full-time equivalency) compensation rate. The total represents Teresa's monthly salary based on a thirty-five hour workweek over a fifty-two week year.

Rate	Equation
Annual	10 × 35 × 52 = 18,200
Monthly	Annualized Comprate / Frequency Annualization Factor of Month 18,200 / 12 = 1516.67

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following job data information:

Employment Variables	Value
Comprate (monthly)	2000
Frequency Annualization Factor of Monthly	12
Frequency Annualization Factor of Biweekly	26
Apply FTE Selected	Yes
FTE Factor	0.95

The following table shows how the system calculates Bill McKenny's biweekly compensation rate:

Rate	Equation
Annual	Comprate × Frequency Annualization Factor of Month 2000 × 12 = 24,000
De-annualize	Annualized Comprate / Frequency Annualization Factor of Biweekly 24,000 / 26 = 923.08
Multiply by FTE	923.08 × 0.95 = 876.85

Job Data Pay Rate Frequencies

The system uses the country-specific default frequencies to calculate and display the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds the frequencies that are associated with the person's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the

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Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described in these topics.

Because the PeopleSoft Global Payroll and Payroll for North America systems calculate daily and monthly pay rates using frequencies established for the pay group, it is possible that the compensation rates displayed on the Job Data - Compensation page will vary from the pay rates calculated with pay group daily and monthly frequencies. This would occur if the pay group daily or monthly frequency differs from the daily or monthly frequency specified for the country on the Default Frequency page. It is recommended that you establish pay group frequencies to match the default frequencies for the country whenever possible.

The pay rates calculated with pay group frequencies are available on the JOB record in the fields JOB.ANNUAL_RT, JOB.MONTHLY_RT, JOB.DAILY_RT, JOB.HOURLY_RT. These fields are referenced by the Job Summary page and can be referenced in PS Query.

Related Topics

- Default Frequencies by Country Page
  Use the Default Frequencies by Country page (DFLT_FREQUENCY) to specify country-specific default frequencies by country.

Understanding Frequency in Global Payroll

PeopleSoft Global Payroll uses frequency when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, PeopleSoft Global Payroll also uses frequency defined on the Generation Control Frequency component.

These topics discuss:

- Frequency with element definitions.
- Frequency with generation control.
- Frequency with calendar periods.
- Frequency with rate codes and system elements.

Frequency with Element Definitions

An *element* is the smallest component of PeopleSoft Global Payroll, and it is used in defining calculation rules to process your payroll. Elements can hold the values of pay (earnings), an amount to be deducted from pay (deduction), or time away from work (absence).

Elements (such as earnings, deduction, and absence) can be standalone. Supporting elements (such as rate codes or rounding rules) can be used with other elements to define a calculation rule. Each element is defined only once, but it can be used repeatedly.

For any earnings, deduction, or absence element, you must specify the frequency of the stated amount on the Earning/Deduction definition. For each item that you associate with a frequency, you must consider how the frequency fits into the overall processing picture. Selecting the correct frequency for earnings, deductions, and absence elements is essential for correct processing. For example:

Term	Definition
Earnings element	In what frequency is the stated amount paid? Is it per week, per month, or per year?

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Term	Definition
Deduction element	In what frequency is the stated amount withheld? Is the stated amount the amount to withhold each pay period, each month, or for the entire year?
Absence element	Is an employee entitled to three days of holiday time per month or per year?

In PeopleSoft Global Payroll, you use frequency to define earnings, deduction, or absence elements.

To illustrate, we refer to defining an earnings element. However, the process is the same for earnings, deduction, and absence elements.

You define the calculation rule, frequency, and generation control for an earnings element on the Earnings - Calculation page (GP_ERN_DED_CALC).

See PeopleSoft Global Payroll: Earnings - Calculation Page.

Select a calculation rule and once you select a calculation rule, you must further define details for each component of the rule. For example, if you select Amount, specify the amount of the earnings element.

The following table lists the calculation rules and the components of the calculation rule for which frequency conversion is performed:

Calculation Rule	Component
Amount	Amount (if necessary)
Rate × Unit	Unit
Rate × Unit × Percentage	Unit
Base × Percentage	Base

Define the frequency that the stated amount represents. If you select Use Calendar Frequency, the system uses the frequency that's defined for the calendar period on the Define Calendars - Period page (GP_CALENDAR_PERIOD). If you select Use Specified Frequency, you can define your frequency directly on the Earnings - Calculation page by selecting from a list of frequencies.

See PeopleSoft Global Payroll: Creating Periods.

The Frequency field enables you to tell the system the frequency with which you are stating a value. For example, let's say that you select Use Specified Frequency, that you have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of *Monthly.* If you don't have any generation control conditions defined, the system annualizes and de-annualizes the amount into a processing frequency amount. Let's assume that you define your organization's monthly frequency as *12* and the weekly frequency as *52.* The system takes the *100* (monthly amount) and annualizes it to *1200.* Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (weekly, in this example). The amount paid each pay period is:

1200 / 52 = 23.08

The benefit of defining a frequency is that if your organization has multiple pay frequencies (such as weekly, semimonthly, and monthly), you don't have to create separate earnings for each frequency. The system automatically converts the amount into the corresponding pay

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period amount. Let's say that your organization decides to give an annual bonus of 1000 to all payees and this bonus is distributed throughout the year. Your hourly payees get paid weekly and your salaried payees get paid monthly. If you define an earnings bonus as *BON = 1000,* with a frequency of Annual, you can apply this earnings definition to payees who are paid weekly and payees who are paid monthly by using annualization and de-annualization. The frequency assigned on the Earnings Calculation page calculates the bonus amount correctly, regardless of the pay frequency.

> **Note**
>
> In PeopleSoft Global Payroll, there is no distinction between organizational relationships (employee, contingent worker, or person of interest). Because payroll is processed for all types of people with jobs, the PeopleSoft Global Payroll documentation refers to both of them as *payees.*

Frequency with Generation Control

Pay period frequency isn't hard-coded into the system. Instead, PeopleSoft Global Payroll uses the HR Frequency Table component to determine how a frequency is calculated. For example, a monthly frequency has a factor of 12 and a weekly frequency has a factor of 52. Frequencies that are defined on the Frequency Table page are easily used wherever you use frequency in the system.

PeopleSoft Global Payroll provides an additional generation control concept called "Generation Control Frequency" to help control the pay periods in which a specific earning or deduction is to be resolved (such as only the first pay period of a month, and so on). Generation control frequencies enable you to define meaningful names and associate the correct frequency ID with a pay period.

An example of a frequency that isn't on the HR Frequency Table is First of the Month. Let's say that you have a weekly pay frequency, but you want an earnings element to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This might not work for your payroll purposes. So, in PeopleSoft Global Payroll, the earnings element would be defined (tagged) as *First of the Month* and paid only on the first pay period of the month.

The Generation Control Frequency component is part of generation control frequency processing.

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if an earnings element is to be paid only on the first pay period of the month (for weekly payrolls), you can control the payroll so that this earning is only paid in Week 1, and not paid in the subsequent week's payrolls during the month:

- First you define generation control ID parameters on the Generation Control - Conditions page (GP_GCTL_CONDITION).

  See PeopleSoft Global Payroll: Generation Control Name Page.
- Next, when you define an earnings element, you prompt against this table by selecting a generation control name on the Earnings - Calculation page.
- Then you don't have to redefine the parameters for each earnings element.

If you leave the Generation Control field blank on the Earnings - Calculation page, the system assumes to be paid every time based on normal eligibility rules for the payee.

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> **Note**
>
> If the frequency that you select is other than *Use Calendar Period Frequency,* the system de-annualizes the earnings amount based on the pay period frequency. If a generation control frequency exists, the system de-annualizes the earnings amount based on that frequency. The generation control frequency overrides the pay period frequency during frequency conversion. For example, let's say that you have an earnings element with an amount of 1200, an annual frequency, and a monthly pay period. If your organization's monthly frequency is defined as *12,* and you don't have a generation control frequency for this earnings, the amount is de-annualized to *100* per month (1200 / 12 = 100). If you have a generation control frequency for this earnings element, the amount is different. Let's say that you have defined a generation control frequency of quarterly. The earnings are de-annualized to *300* (1200 / 4 = 300).

PeopleSoft Global Payroll delivers four predefined generation control frequencies: *1st Month, Annual, January,* and *Quarter.* All generation control frequencies can be used in corresponding generation control elements.

Using Frequency with Calendar Periods

Use frequency with calendar periods when defining the frequency that's being processed.

When processing a payroll or absence run in PeopleSoft Global Payroll, you must tell the system the time period to calculate. This is often referred to as the pay period. You define period selection criteria by defining a period ID on the Define Calendars - Period page.

See PeopleSoft Global Payroll: Creating Periods.

The period ID defines the start date, end date, and frequency of a particular pay period. This definition is kept separate from the pay calendar to make it easy to reuse and to provide optimum flexibility during processing.

Here are some examples of the time and frequency data that can be defined by a period ID:

Begin Date	End Date	Frequency
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

On the Define Calendars - Period page, the frequency is defined for de-annualization when an earnings, deduction, or absence element is defined without generation control frequency. However, if generation control frequency is included (in the earnings, deduction, or absence element definition), and the element generation control and the calendar ID generation control match, the system uses this generation control frequency for the de-annualization factor.

Examples of Frequencies

This table provides some examples of frequencies:

Frequency	Element 1	Element 2a	Element 2b	Element 3
Amount	1,200	1,200	1,200	1,200

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Frequency	Element 1	Element 2a	Element 2b	Element 3
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semimonthly (24)
Pay Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24) *
Calendar Generation Control Frequency	None	Monthly (12)	None	Semimonthly (24) *
Calculated Amount	600	1200	Not resolved	600

You don't need to specify the associated frequency if it coincides with the pay period frequency.

See Job Data Pay Rate Frequencies.

Using Frequency with Rate Codes and System Elements

When you define an earnings or deduction element that uses either a rate code or a frequency-controlled system element, the earnings or deduction element should always have the frequency Use Calendar Period Frequency. System elements are delivered and maintained by PeopleSoft.

A system element that is frequency-controlled resolves in the calendar frequency portion of payroll processing, according to the frequency that is specified for the element when it is set up. The system then de-annualizes by the calendar frequency.

Understanding Frequency in Payroll for North America

These topics discuss:

- Compensation frequency and pay frequency.
- Examples of pay rate calculations.
- Proration of compensation rates.
- Exceptions to Frequency table use.

Compensation Frequency and Pay Frequency

In Payroll for North America you use the frequencies on the Frequency Table component to specify pay period frequency on the Pay Group component. The system uses compensation and pay frequencies for the calculation and proration of pay rates during batch and online system processes.

Related Topics

- Job Data Pay Rate Frequencies
  The system uses the country-specific default frequencies to calculate and display the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds

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the frequencies that are associated with the person's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described in these topics.

Examples of Pay Rate Calculations

This topic provides examples of how the system uses compensation rates and frequencies and pay period frequency to calculate pay rates.

Example: Biweekly Pay Period Calculation of Monthly Compensation

This example illustrates how Payroll for North America calculates the pay period rate by annualizing monthly compensation using the following frequencies:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	B1	B (biweekly)	26.1
Compensation frequency (employee's Job data setup)	M	M (monthly)	12

Using a compensation rate of 1,000 USD, the calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × Compensation Frequency Factor

  12,000.00 = 1,000.00 × 12
- Pay Period (Biweekly) Rate = (Annual Rate) / Pay Frequency Factor

  459.77 = 12,000.00 / 26.1

Example: Weekly Pay Period Calculation of Hourly Compensation

Payroll for North America uses the annualization factor of the standard work period frequency in combination with the standard hours to calculate pay rates or proration of hourly compensation.

This example illustrates how Payroll for North America calculates the weekly pay period rate of hourly compensation.

The pay group's pay period frequency definition is:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	W (weekly)	W (weekly)	52

The employee's compensation frequency definition is:

Comp Rate	Comp Frequency	Standard Hours	Annualization Factor of Std Work Period
10.00	H (hourly)	40.00	52

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The calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × (Standard Hours × Standard Work Period Annualization Factor)

  20,800.00 = 10 x 40 × 52
- Pay Period (weekly) Rate = Annual Rate / Pay Frequency Factor

  400 = 20,800.00 / 52

Proration of Pay Rates

The system calculates proration for partial periods when events such as new-hires, terminations, or pay rate changes occur in the middle of a pay period. It uses data that you specify on the Pay Group component in conjunction with compensation data to calculate proration.

See PeopleSoft Payroll for North America: Understanding Proration Rules.

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the Pay Calendar Table page (PAY_CALENDAR_TABLE). The value in the **Pay Periods Per Year** field on the Pay Calendar Table page is derived from the pay frequency of the pay group.

Related Topics

- Creating Pay Calendars and FLSA Calendars
  To create pay calendars and FLSA calendars use the Create Pay Calendars (RUNCTL_PAY_CAL_BLD), FLSA Calendar Table (FLSA_CALENDAR), Initial FLSA Calendar (RUNCTL_FLSACALPD) components. Use the FLSA_CALENDAR component interface to load data into the tables for the FLSA Calendar Table component.
- Setting Up Pay Groups
  To set up pay groups, use the Pay Group Table component (PAYGROUP_TABLE).

Defining a Frequency ID and Country-Specific Defaults

To define a frequency ID and country-specific defaults, use the Frequency Table component (FREQUENCY_TBL) and the Default Frequencies by Country component (DFLT_FREQUENCY).

These topics discuss frequency information.

Pages Used to Define a Frequency ID and Country-Specific Defaults

Page Name	Definition Name	Usage
Frequency Table Page	FREQUENCY_TBL	Define a frequency ID, its frequency type, and its annualization factor.
Default Frequencies by Country Page	DFLT_FREQUENCY	Specify country-specific default frequencies by country.

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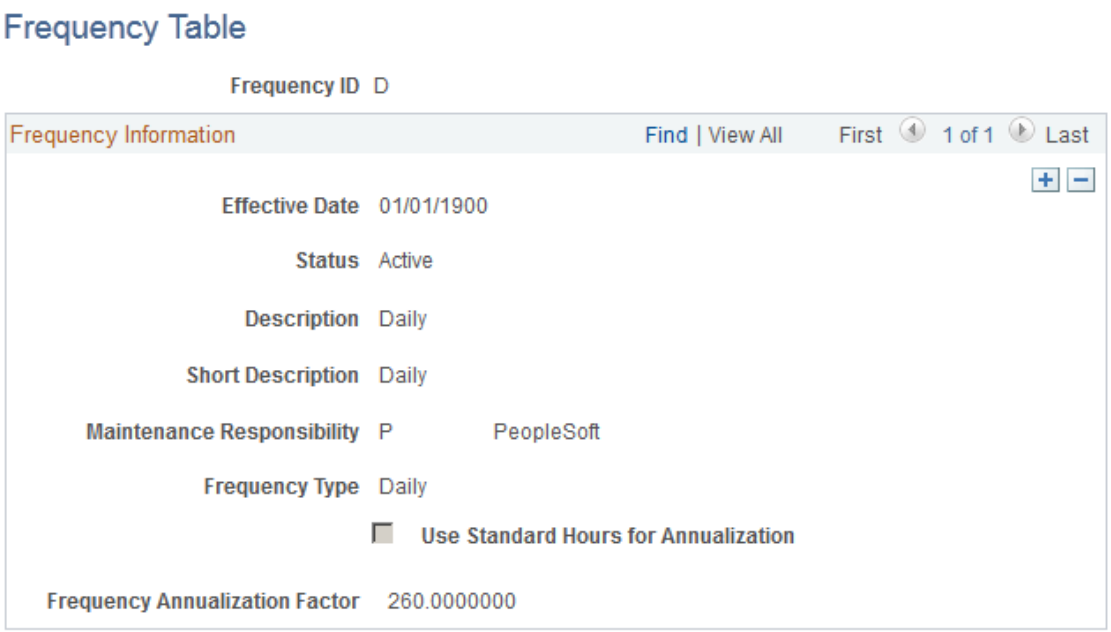
Frequency Table Page

Use the Frequency Table page (FREQUENCY_TBL) to define a frequency ID, its frequency type, and its annualization factor.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Compensation Rules**, and then **Frequency Table**, and then **Frequency Table**

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



Field or Control	Description
Maintenance Responsibility	Select a maintenance responsibility. Values are: • *C* (customer): You define the frequency ID. You are responsible for keeping this frequency code up to date. • *P* (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

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Field or Control	Description
Frequency Type	Select a frequency type. Values are: • *Annual* • *Biweekly* • *Contract* • *Daily* • *Every Four Week* • *Hourly* The **Use Standard Hours for Annualization** check box becomes available. • *Monthly* • *Quarterly* • *Semimonthly* • *Weekly*
Use Standard Hours for Annualization	Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The frequency annualization factor is set to *0*, and that field becomes unavailable. **Note:** You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft Human Resources, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.
Frequency Annualization Factor	Defines how many frequency periods occur in one year. Examples: • A standard daily compensation frequency is *260* because there are *260* workdays in a standard year. • You can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53. **Note:** If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

Default Frequencies by Country Page

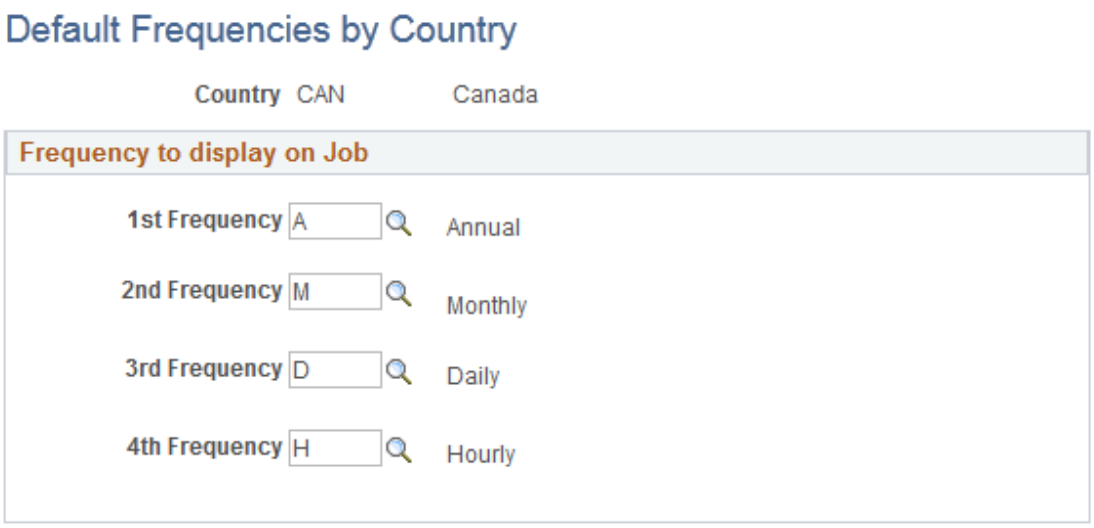
Use the Default Frequencies by Country page (DFLT_FREQUENCY) to specify country-specific default frequencies by country.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Compensation Rules**, and then **Default Frequencies By Country**, and then **Default Frequencies by Country**

This example illustrates the fields and controls on the Default Frequencies by Country page. You can find definitions for the fields and controls later on this page.

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Select four frequencies to set as defaults for the specified country. The system uses these default frequencies to calculate pay rates in the Pay Rates group box on the Job Data - Compensation page. The order you list the frequencies on this page is the order in which the pay rates appear in the Pay Rates group box.

For example, you specify the **1st Frequency** as annual, **2nd Frequency** as monthly, **3rd Frequency** as daily, and **4th Frequency** as hourly for Canada. For an employee in Canada, the Pay Rates group box displays the following pay rates in this order: annual, monthly, daily, and hourly. The system converts compensation rates to the default frequencies using the standard formulas described earlier in these topics.

Related Topics

- Job Data Pay Rate Frequencies
  The system uses the country-specific default frequencies to calculate and display the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds the frequencies that are associated with the person's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described in these topics.

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13

Setting Up Organization Foundation Tables

Setting Up Person of Interest Types

To set up person of interest types, use the Person of Interest Types (POI_TYPE_TBL) component.

These topics provide an overview of POI types and discuss how to set up new POI types and activate delivered POI types.

Page Used to Set Up Person of Interest Types

Page Name	Definition Name	Usage
Person of Interest Types Page	POI_TYPE_TBL	Review the delivered POI types and modify the characteristics that govern how the system processes the information of POIs with this type.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Organizational Relationships

Understanding POI Types

PeopleSoft enables you to track information for people of interest (POIs), people who do not make up a part of your workforce but who are still of interest to the organization. Different POI types are used in different areas of your organization. For example, PeopleSoft Global Payroll uses the Global Payroll Payee POI type, whereas the External Trainee POI type may be used by PeopleSoft Recruiting Solutions for applicants who require training prior to being hired and PeopleSoft Campus Solutions.

You select a POI type on three components:

- Add a Person component (PERSON_DATA_ADD)
- Job Data component (JOB_DATA)
- Person Organizational Summary component (PERSON_ORG_SUMM)

The generic components are on the Workforce Administration menu but these components are also available on different application menus throughout the system. When you set up or modify a POI type, you can limit the components on which the POI type can be selected by menu. For example, you could create a new recruiting POI type that is only available on the components on the Recruiting menu or you could make the Pension Payee POI type, which is delivered as an option only on the Pension Administration menu, available on the Administer Workforce menu components, too.

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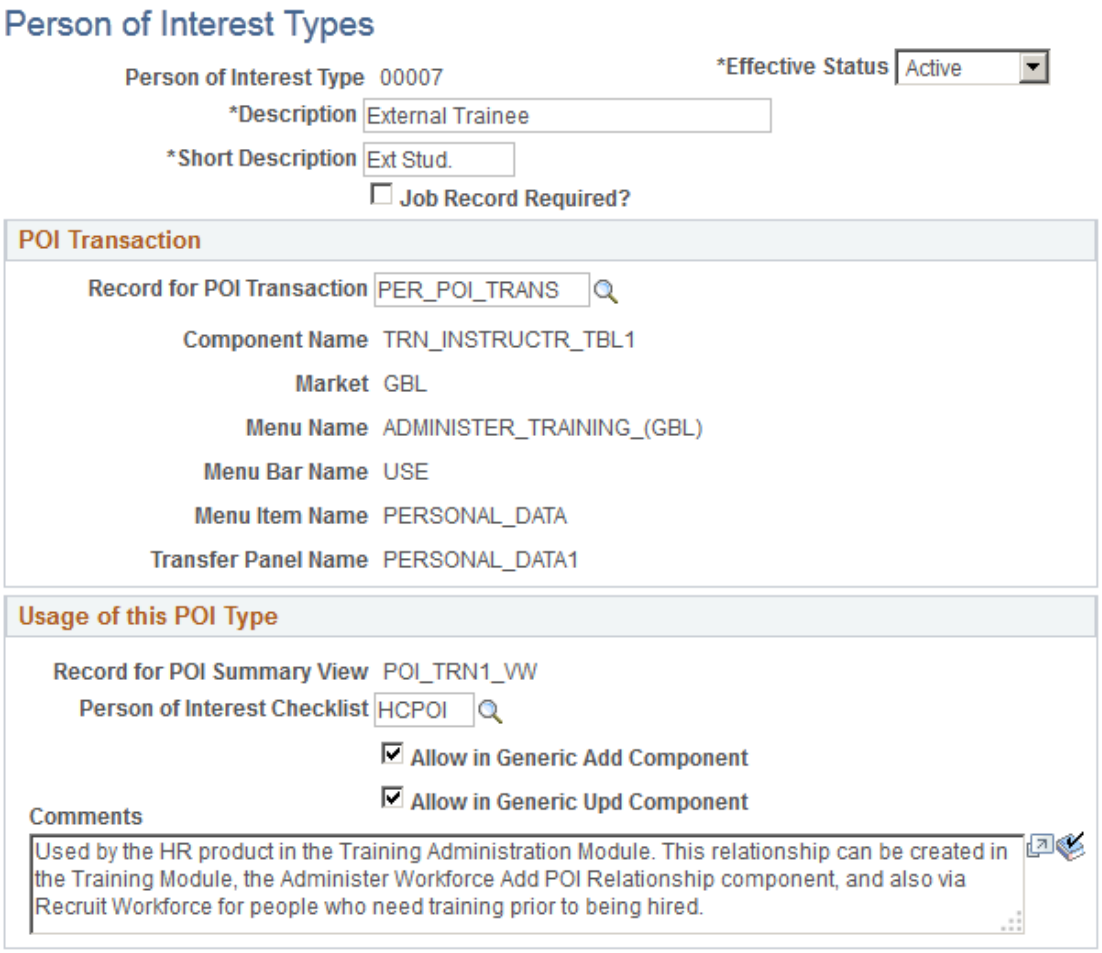
Person of Interest Types Page

Use the Person of Interest Types page (POI_TYPE_TBL) to review the delivered POI types and modify the characteristics that govern how the system processes the information of POIs with this type.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Person of Interest Types**, and then **Person of Interest Types**

This example illustrates the fields and controls on the Person of Interest Types page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Effective Status	Inactivate any system delivered POI types that you will not be using so that they do not appear as options on HCM transaction components.

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Field or Control	Description
Job Record Required?	Select if this POI type requires a POI job record. When you select this check box for a new POI type, the system enters default information into the POI Transaction group box that you cannot overwrite.

POI Transaction

Field or Control	Description
Record for POI Transaction	Select the record used for processing and holding information about people with this POI type. If you select the PER_POI_TRANS record (the generic POI transaction record used by the Person Organization Summary component), the system enters default information into the rest of the fields in the POI Transaction group box and the **Record for POI Summary View** field that you cannot overwrite. If you choose to use a record other than PER_POI_TRANS for POI types that do not require jobs, you will need to create a view to use in the Record for POI Summary View field in order for the data in the transaction record to show up in the Person Organizational Summary component.
Component Name	Select the component using the POI transaction record. When you select this POI type on the Personal Data – Organizational Relationships page and click the Add the Relationship button, the system will move you to the component you select here.
Market, **Menu Name**, **Menu Bar Name**, and **Menu Item Name**	Select the menu's market, name, bar name, and item name for the selected component.
Transfer Panel Name	Enter the object name of the page you want the system to open to when you click the Add the Relationship button.

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Usage of this POI Type

Field or Control	Description
Record for POI Summary View	Select the record from which the system draws the summary information for this POI type. When you view the organizational relationships of a person with this POI type on the Person Organizational Summary component, the system pulls the summary information from this record. If you choose to use a record other than PER_POI_TRANS, you must create a view to use here in order for the data in the transaction record to show up in the Person Organizational Summary component. Create the view in PeopleSoft Application Designer using the PER_POI_TRANS view but with different view text.
Person of Interest Checklist	Select a default checklist for this POI type. When you opt to assign a POI type to a person and create a POI checklist from the Personal Data - Organizational Relationships page (PERSONAL_DATA4), the system creates a record for the person on the Person Checklist page (PERSON_CHECKLIST) and adds this checklist. See PeopleSoft Human Resources Administer Workforce: Creating Checklists.
Allow in Generic Add Component	Select to make this POI type available when adding a record for a POI in the Add a Person component, Job Data component, and Person Organizational Summary component on the Administer Workforce menu. The system selects this check box for all new types.
Allow in Generic Upd Component (allow in generic update component)	Select to make this POI type available when updating a record for a POI in the Job Data component and Person Organizational Summary component on the Administer Workforce menu.

Modifying a Delivered POI Type

You can modify the following fields for system delivered POI types:

- **Effective Status.**
- **Person of Interest Checklist.**
- **Allow in Generic Add Component.**
- **Allow in Generic Upd Component.**

Setting Up Holiday Schedules

To set up holiday schedules, use the Holiday Schedule (HOLIDAY_SCHED_TBL) component.

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These topics provide an overview of holiday schedule defaults on the Job Record and discuss how to define holiday schedules.

Page Used to Set Up Holiday Schedules

Page Name	Definition Name	Usage
Holiday Schedule Page	HOLIDAY_SCHED_TBL	Designate holidays for payroll processing.

Understanding Holiday Schedule Defaults on the Job Record

Because holidays might vary for different segments of your workforce population (depending on location, work schedules, or other factors), you can define as many holiday schedules as you need.

Defaulting of the holiday schedule to the worker's job record depends upon the payroll system:

- PeopleSoft Global Payroll.

  If the payroll system is Global Payroll, the system does not enter a default holiday schedule on the Job Data - Payroll page. On the Payroll page, you may select a holiday schedule for the payee or leave the field blank. If you leave it blank, Global Payroll processes use the holiday schedule assigned to the payee's pay group.

- PeopleSoft Payroll for North America.

  If the payroll system is Payroll for North America, the default holiday schedule entered on the Job Data - Payroll page is determined by whether you're adding a worker or updating job data, and by whether you have defined a default holiday schedule for the location.

  This topic provides additional details for each of these conditions.

When You Add a Worker with Payroll for North America Payroll System

If the payroll system is Payroll for North America, the default holiday schedule initially entered on the Job Data – Payroll page is the holiday schedule that is associated with either the Location table or the Pay Group table:

- Location table.

  If you have assigned a default holiday schedule on the Location Profile page, that schedule is the default when you add a worker with that location.

- Pay Group table.

  If you leave the Holiday Schedule field blank on the Location table, the system enters the default holiday schedule that is assigned to the pay group.

You can change the holiday schedule on the worker's Job Data – Payroll page.

When You Change the Job Data of a Worker with Payroll for North America Payroll System

Changes in the following job data fields might cause a change in holiday schedule if the **Holiday Schedule** field is blank on the worker's Job Data – Payroll page:

- Company
- DeptID (department ID)
- Position Number

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- Pay Group

> **Note**
>
> If the holiday schedule is already populated on the worker's job record, changes in these fields do not cause updating of the holiday schedule.

This is a description of the impact of changes in these fields:

- Company and DeptID.

  If the worker's holiday schedule is not populated, changes in Company and DeptID cause the system to first enter the default holiday schedule from the Location table. If there is no default holiday schedule assigned on the Location table, the system enters the holiday schedule assigned on the Pay Group table.

- Position Number and Pay Group.

  Changes in the Position Number and Pay Group fields cause the system to enter the default holiday schedule directly from the Pay Group table if the worker's holiday schedule is not already populated.

Holiday Schedule Page

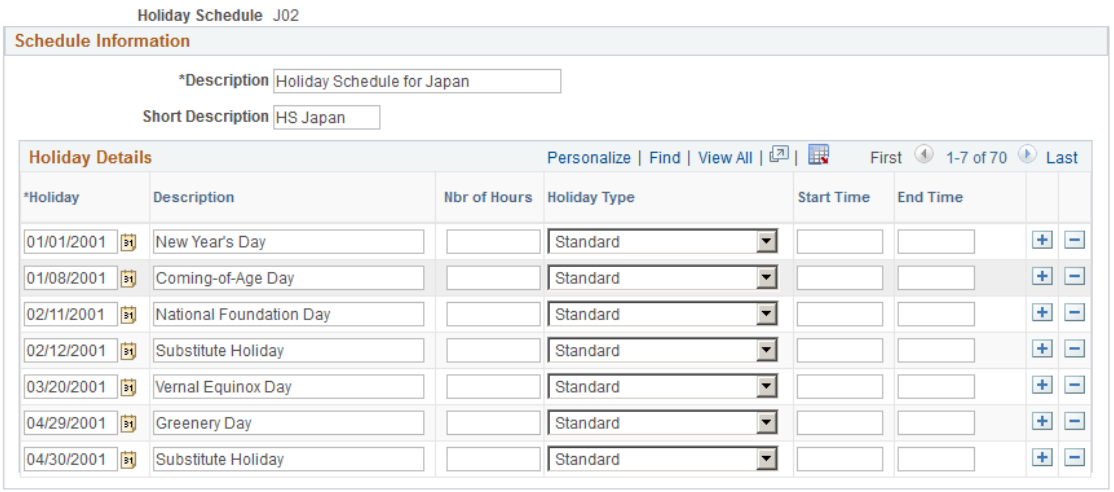
Use the Holiday Schedule page (HOLIDAY_SCHED_TBL) to designate holidays for payroll processing.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Holiday Schedule**, and then **Holiday Schedule**

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

Holiday Schedule



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Field or Control	Description
Holiday	Enter all of the holiday dates that your organization observes within this schedule.
Nbr of Hours (number of hours)	(Optional) You can specify the number of paid hours for each holiday. Payroll for North America uses this field to reduce from pay.
Holiday Type	Select a holiday type. The following values are used in PeopleSoft Payroll for North America: *Canadian*: In Payroll for North America, this value designates a Canada statutory holiday. *Standard*: In Payroll for North America, this value designates a U.S. holiday or Canada non-statutory holiday. *US Public*: Select if the holiday is a public holiday in the U.S. The following values are used in PeopleSoft Payroll for Hong Kong: *Hong Kong Statutory Holiday*: In Payroll for Hong Kong, this value designates a Hong Kong statutory holiday. *Standard*: In Payroll for Hong Kong, this value designates a public holiday.
Start Time and **End Time**	(Optional) You can specify the starting and ending time of each holiday. **Note:** Payroll for North America and Global Payroll do not refer to these fields.

Defining Business Units

To define business units, use the Business Unit (HR_BUSINESS_UNIT), Business Unit Options Defaults (BUS_UNIT_OPT_HR), and GL Business Unit (BUS_UNIT_GL) components.

These topics discuss how to update business units.

Pages Used to Update Business Units

Page Name	Definition Name	Usage
Business Unit Page	BUS_UNIT_TBL_HR	Add or update business units.
Business Unit Reference Page	BUS_UNIT_TBL_HR2	Identify business units in other PeopleSoft applications that are related to a business unit.
Business Unit Options Defaults Page	BUS_UNIT_OPT_HR	Set system defaults such as Company, Country, and Currency for a specific Set ID.
GL Business Unit Page	BUS_UNIT_TBL_GL	Review GL business units.

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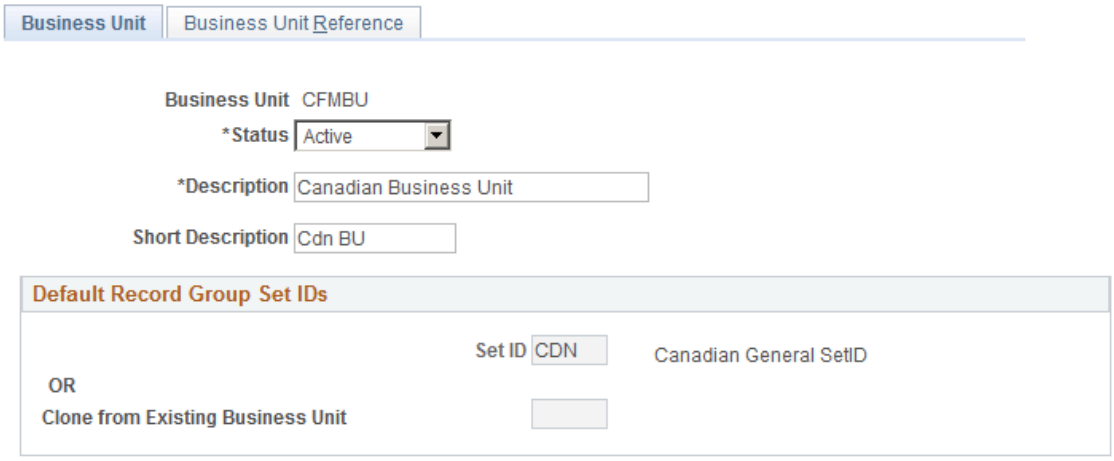
Business Unit Page

Use the Business Unit page (BUS_UNIT_TBL_HR) to add or update business units.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Business Unit**, and then **Business Unit**

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



Field or Control	Description
Status	Select *Active* or *Inactive*. If you select *Inactive*, the business unit won't appear in any business unit lists in PeopleSoft HCM. **Note:** Business units aren't effective-dated, so use this field to implement or retire business units.

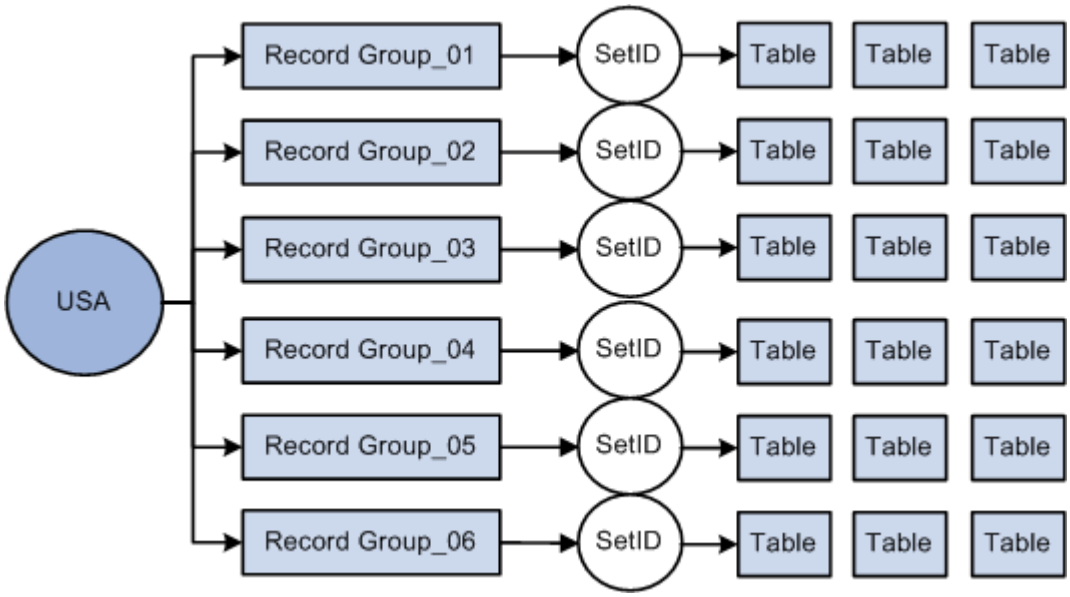
Understanding Your TableSet Sharing Options

Field or Control	Description
Default Record Group Set IDs	When you define a new business unit on the Business Unit component, you specify that the system establish default record group set IDs for the new business unit, using the options in this group box. The **Set ID** or **Clone from Existing Business Unit** value that you enter determines your preliminary tableset sharing setup for the new business unit by determining the set IDs that are assigned to each record group for the new business unit. The set ID assigned to a record group determines which tableset is used when retrieving valid values from the various control tables for that business unit.

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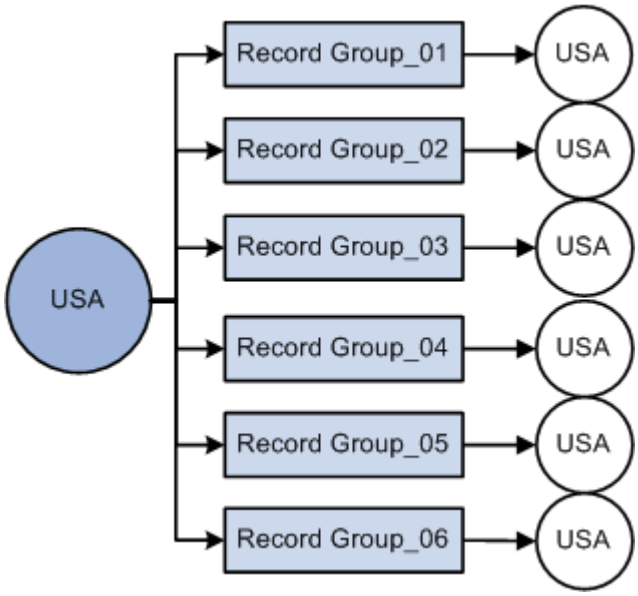
Establishing a TableSet Sharing Setup Using One Default Set ID

If you want to define a tableset sharing setup for the new business unit you are creating, using a primary default set ID that you can modify as necessary on the TableSet Control - Record Group page (SET_CNTRL_TABLE1), enter the default set ID that you want to use.



When you add a new business unit to the system, the system populates the **Set ID** field with a set ID name that is the same as your new business unit. For example, if your business unit is called *USA,* then the **Set ID** value defaults to *USA.* You can override the default set ID as necessary.

When you save the business unit without changing the default set ID, the system creates a new set ID with the same name as the business unit, in this case *USA,* and this default set ID of *USA* that you specified on the Business Unit page is assigned to each record group for the new business unit, as shown in this diagram:



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> **Note**
>
> You can associate only one default set ID with a business unit.

Cloning TableSet Setup From Existing Business Units

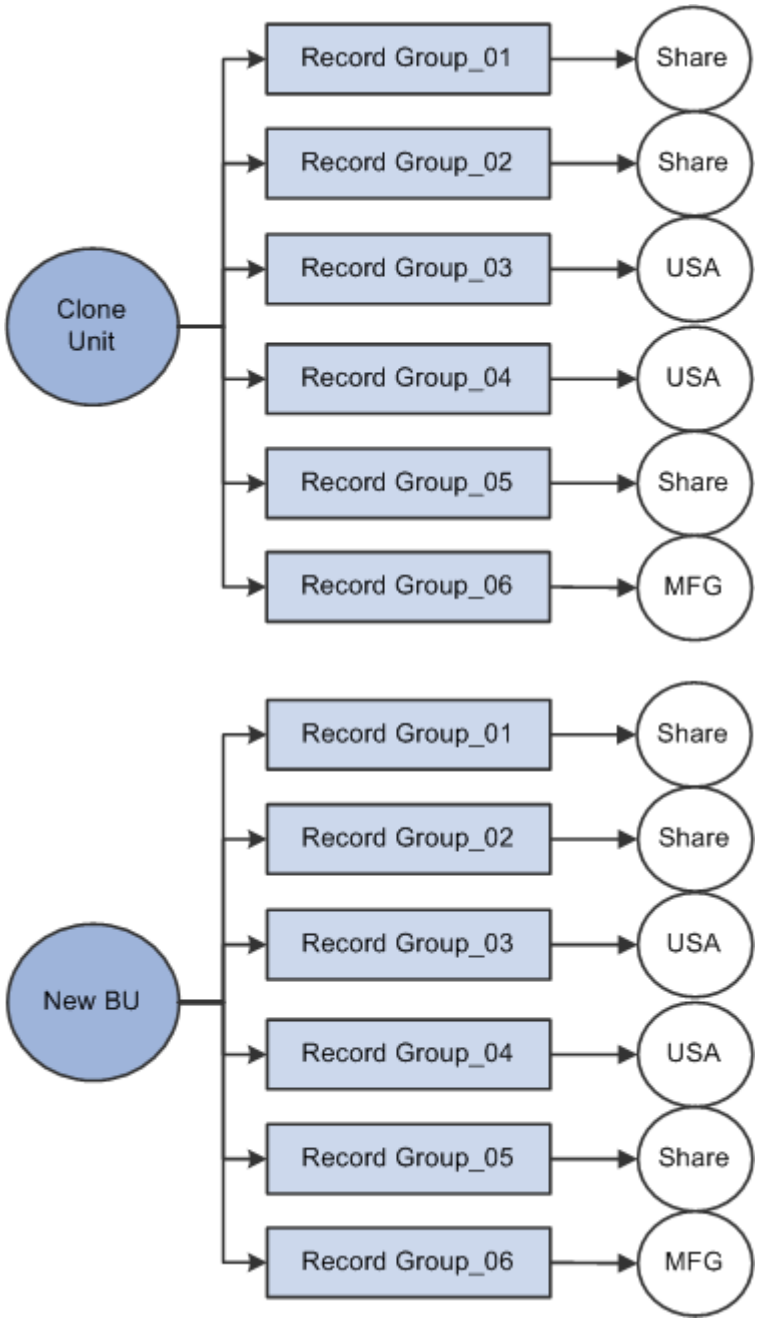
With the **Clone from Existing Business Unit** option, you can clone the TableSet sharing setup of an existing business unit.

> **Note**
>
> When you first enter the Business Unit page, the **Clone from Existing Business Unit** option is clear. To activate the option, clear any set ID values from the **Set ID** field and move out of the field.

If you want the tableset sharing for the new business unit that you are creating to mirror that of another business unit you've defined, or if you want the two units to be similar except for a few record groups, enter the business unit that you want to mirror as the cloned business unit. When the record groups are linked to the new business unit, the system assigns each record group the same set ID that is used for the record group by the business unit that you selected as the Clone Unit.

For example, you specify an existing business unit to clone that has the set ID *SHARE* associated with record groups 01, 02, and 05, set ID *USA* associated with record groups 03 and 04, and set ID *MFG* associated with record group 06. The new business unit you create will share these identical set ID values for the same record groups, as shown in this diagram:

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Whichever method you select, after you save the new business unit for the first time, the system makes the default **Set ID** or **Clone from Existing Business Unit** fields unavailable for entry. You can't change the default record group set ID information from this page for this business unit again. This rule prevents you from accidentally overwriting the TableSet record group controls for your defined business units in PeopleSoft HCM.

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> **Note**
>
> When you add a new business unit and save the page, the system creates all the appropriate table values provided by PeopleTools that connect the business unit ID, the record group ID, and the set ID.

TableSet sharing is set up as soon as you create your business units. However, the sharing, especially if you have chosen to create a TableSet sharing setup using one default set ID, may need some fine-tuning. You can do this by changing the set IDs that are assigned to individual record groups on the TableSet Control — Record Group page. The system uses the default **Set ID** value on this page when you add record groups.

See *PeopleTools: Data Management*, “PeopleTools Utilities,” TableSet Control - Record Group.

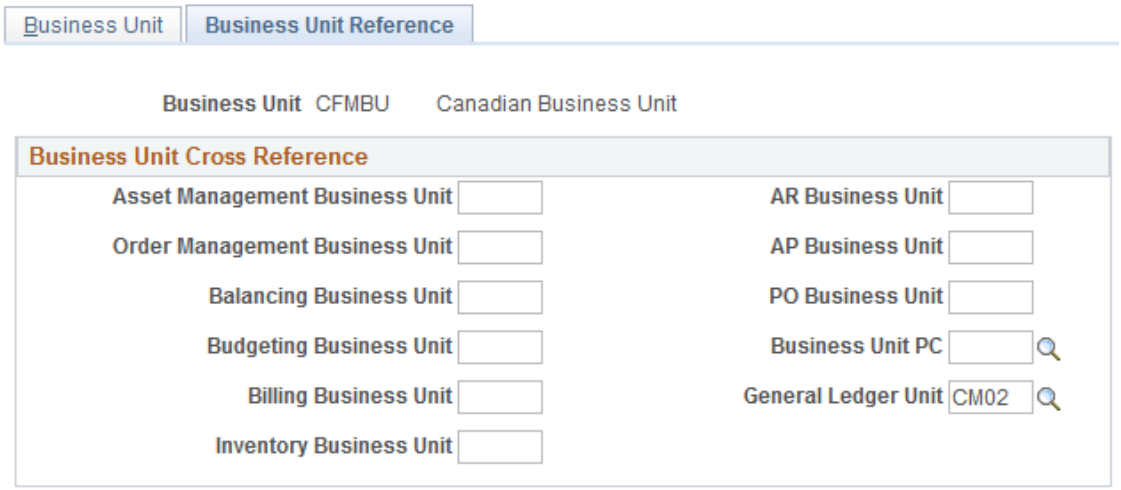
Business Unit Reference Page

Use the Business Unit Reference page (BUS_UNIT_TBL_HR2) to identify business units in other PeopleSoft applications that are related to a business unit.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Business Unit**, and then **Business Unit Reference**

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



Field or Control	Description
Business Unit Cross Reference	In this group box, enter the business unit cross reference, if applicable, for any PeopleSoft application that is listed on the page. You identify other business units in other PeopleSoft applications that relate to your business unit.

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> **Note**
>
> You can review which PeopleSoft General Ledger units are associated with the PeopleSoft HCM business units on the GL/HR Business Unit Mapping page (BU_GL_HR_LNK).

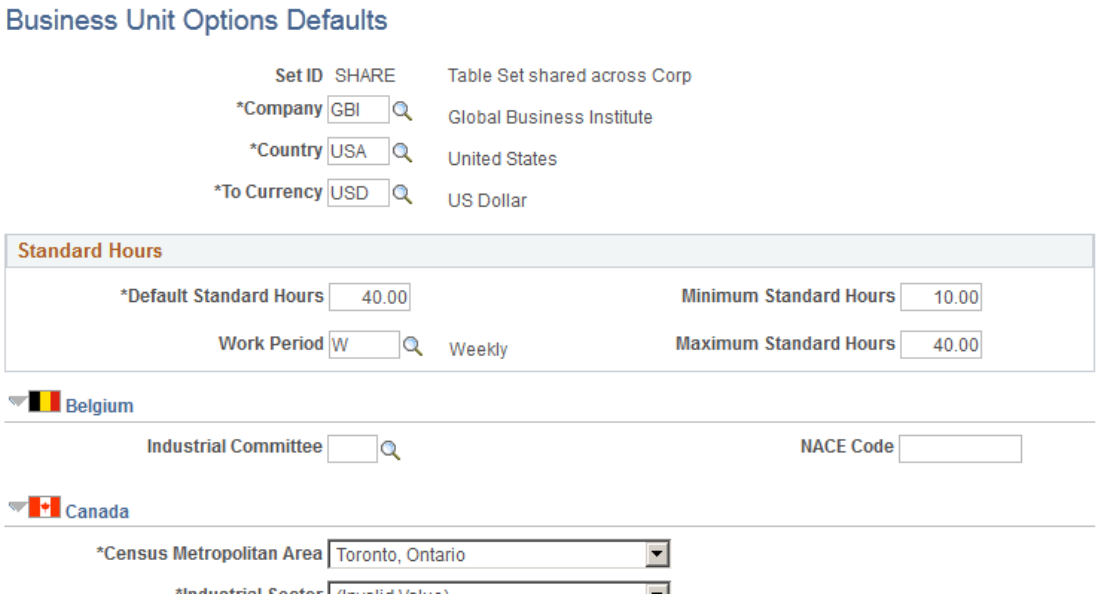
Business Unit Options Defaults Page

Use the Business Unit Options Defaults page (BUS_UNIT_OPT_HR) to set system defaults such as Company, Country, and Currency for a specific Set ID.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Business Unit Options Defaults**, and then **Business Unit Options Defaults**

This example illustrates the fields and controls on the Business Unit Options Defaults page. You can find definitions for the fields and controls later on this page.



By setting up default values for a set ID, you can specify the default values that populate these fields in your human resources system. Because the set ID keys the Business Unit Options Defaults component (you can share these defaults among multiple business units.

> **Warning**
>
> The values that you enter or select on this page affect the default values throughout your PeopleSoft HCM system.

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Field or Control	Description
Company, Country, and **To Currency**	Select the **Company, Country,** and **To Currency** that the system will use as a default value.

Standard Hours

Field or Control	Description
Default Standard Hours	The system takes default standard hours from the Define Salary Plan component (SALARY_PLAN_TABLE), the Job Code Table component (JOB_CODE_TBL), or the Installation Table component (INSTALLATION_TBL).
Work Period	The standard work period is 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 default standard hours to calculate FTE (full-time equivalency). The system takes default standard work period from the salary plan, the job code, or the Installation Table. The value that you enter here is used for validation in the Job Data pages (JOB_DATA) and the Position Data component (POSITION_DATA).

Field or Control	Description
Minimum Standard Hours and **Maximum Standard Hours**	Enter the default minimum and maximum standard hours for this Set ID. The value that you enter here is used for validation on the Job Data pages and the Position Data component.

(BEL) Belgium

Field or Control	Description
Industrial Committee	Select the appropriate industrial committee for the company. This can be overwritten at the department level if necessary.

Field or Control	Description
NACE Code	Enter the NACE code for the company. Note: You can choose the level of detail for the NACE Code. It can range from 5 digits for group level, 6 for class level and 7 for subclass level.

(CAN) Canada

Field or Control	Description
Census Metropolitan Area	Select a metropolitan area.

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Field or Control	Description
Industrial Sector	Select an industrial sector. The selected value is used as the default industrial sector for Canadian departments.

> **Note**
>
> These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

Entering Company Information

To enter company information, use the Company Legal Type (LEGAL_TYPE), Company (COMPANY_TABLE), and Company Table Report (RUN_PER707) components.

These topics provide an overview of companies and discuss entering company information.

Pages Used to Enter Company Information

Page Name	Definition Name	Usage
Company Legal Type Page	LEGAL_TYPE_TBL	Associate the correct legal type with each company on the Company Table and use the information when you generate reports. Many countries require that you report on your organization's legal structure, whether it's a corporation, a public limited company, a cooperative, or another type of organization.
Company - Company Location Page Agency Location Page	COMPANY_TABLE1	Define and describe companies.
Default Settings Page	COMPANY_TABLE2_GBL	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.
(Payroll for North America) General Ledger Liability Accts Page	COMP_TBL7USA_SEC	Enter General Ledger account codes for net pay and direct deposits.
(USA) Tips Processing Page	COMP_TBL6USA_SEC	Set up tip allocation.
(USA) Tax Details Page	COMP_TBL8USA_SEC	Specify your federal employer identification number, link companies together, and define default tax status.

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Page Name	Definition Name	Usage
(BEL) Company Table - BEL Page	COMP_TBL2ABEL_SBP	Enter the default information and salary factors that are used to perform Claeys formula calculations.
(BEL) External Providers BEL Page	COMP_TBL2BBEL_SBP	Associate a provider with a set ID.
Company - Phones Page	COMPANY_TABLE3_GBL	Enter telephone information for a company.
Rules Definition Page	COMPANY_TABLE4_GBL	Define FTE rules for the company.
Company Table Report - Run Control Page	PRCSRUNCNTL	Run the Company Table report (PER707). This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.
(BRA) Company Details BRA Page	COMPANY_TABLE_BRA	Enter company details that are specific to country of Brazil.

Understanding Companies

Use the Company component to enter information about a single company or multiple companies in your organization, from the corporate address to general ledger accounts, tax information, and payroll processing information.

If you're using only PeopleSoft Human Resources, you enter information only on the Company Location page (COMPANY_TABLE1) for each company that you want to add. You can also associate a default pay group with the company on the Default Settings page (COMPANY_TABLE2_GBL). The value you select appears as the default on the Job Data pages for people in this company. However, it is easier to treat each company that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific company information on the Pay Entity component (GP_PYENT), if your pay entity is the same as the company. You do this in PeopleSoft Global Payroll.

(USA) Special Considerations for U.S. Companies

PeopleSoft Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active job data records. These retiree jobs must be associated with specific retiree companies. Therefore, be sure to set up companies to house your payees. Because pension plans are distinct tax reporting entities with their own U.S. Employer Identification Numbers (EINs), you typically set up one retiree company for each pension plan that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component (PLANADM).

For U.S. companies, if you're using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a company is typically defined as a business unit that has a unique

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federal Employer Identification Number (EIN) for payroll tax reporting purposes. Because pension plans have EINs, you create companies for each pension plan. You reference a pension plan company from the payee job data record of anyone collecting benefits from that plan.

If your company uses PeopleSoft Payroll for North America, each company that you add must be equivalent to each EIN that you use. To add a company EIN, your payroll staff needs to complete all three pages at least once.

Related Topics

- PeopleSoft Pension Administration: Funding Provider and Company Page
- PeopleSoft Payroll for North America
- PeopleSoft Payroll Interface

Company - Company Location Page

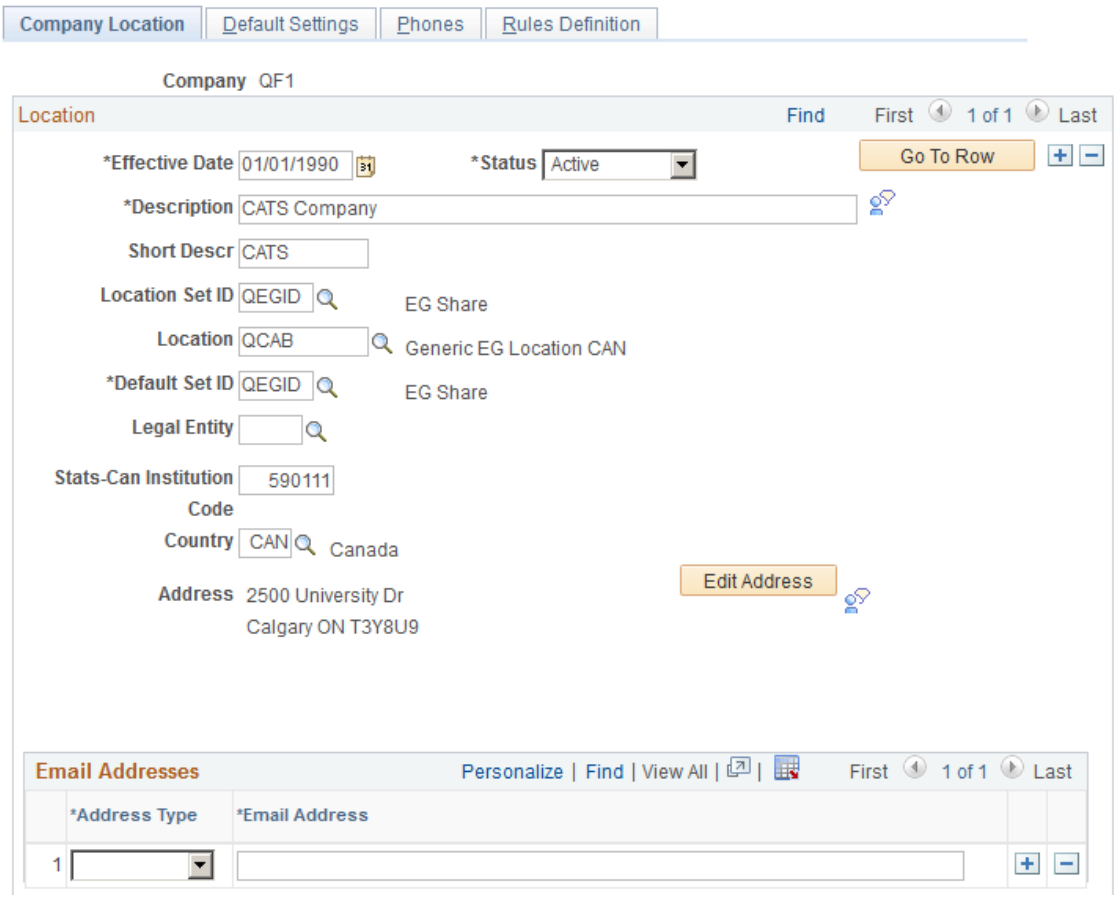
Use the Company - Company Location page (COMPANY_TABLE1) to define and describe companies.

Navigation:

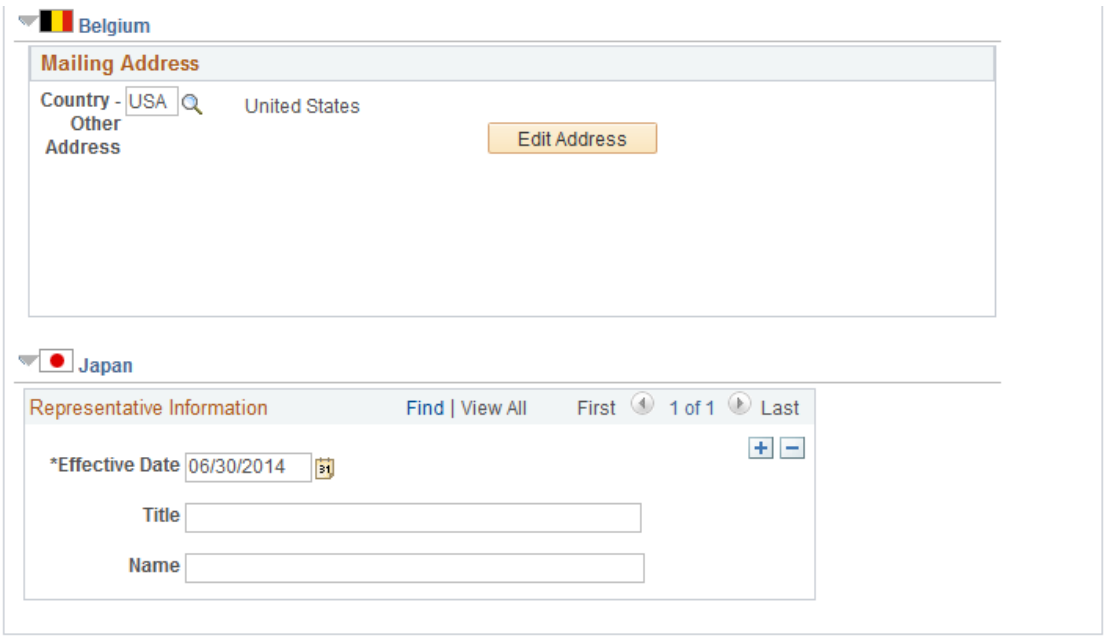
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company**, and then **Company Location**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company BRA**, and then **Company Location**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Federal Agency Setup** , and then **Agency Location**

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

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



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For a single-company environment, you set up this table only once; for multiple-company environments, you set up a company code for each company.

Field or Control	Description
(E&G) Stats-Can Institution Code (Statistics Canada institution code)	Enter your Statistics Canada institution code. In this eight-digit code, digits 1-2 identify the province in which the institution is located, digits 3-5 identify the institution, and digits 6-8 identify the campus (if applicable). This field is visible only when the Installation Table -Products Page check box for Education and Government is selected and the Installation Table - Country Specific Page specifies Canada as the default country.

(BEL) Belgium

Enter the mailing address information for your Belgian companies.

(JPN) Japan

Field or Control	Description
Title	Enter the title of your company's representative as of the effective date. This is the person whose title (and name) appears by default on the Appointment Notification report page. If you accept the default—which you can override on the report page—the title and name appear on the Notification of (Hiring, Department Change, Grade Advance or Termination) pages.
Name	Enter the representative's name. You can override this default on the Appointment Notification report page.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Recording and Viewing Employee Additional Appointments Data

Default Settings Page

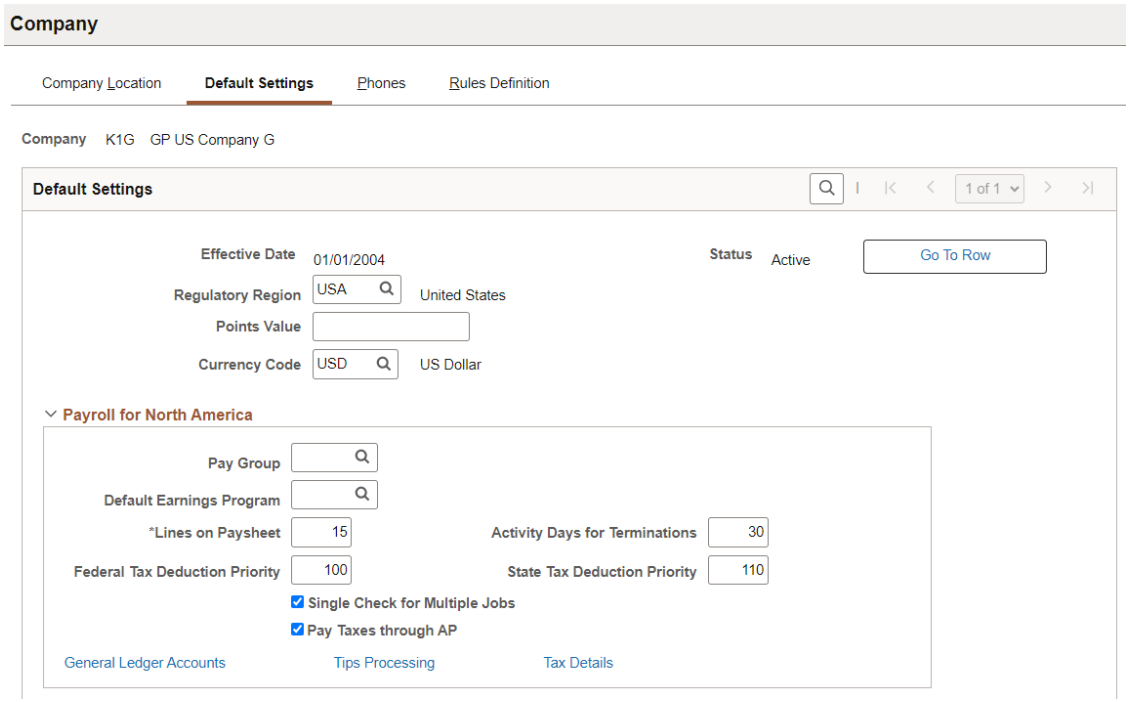
Use the Default Settings page (COMPANY_TABLE2_GBL) to set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.

Navigation:

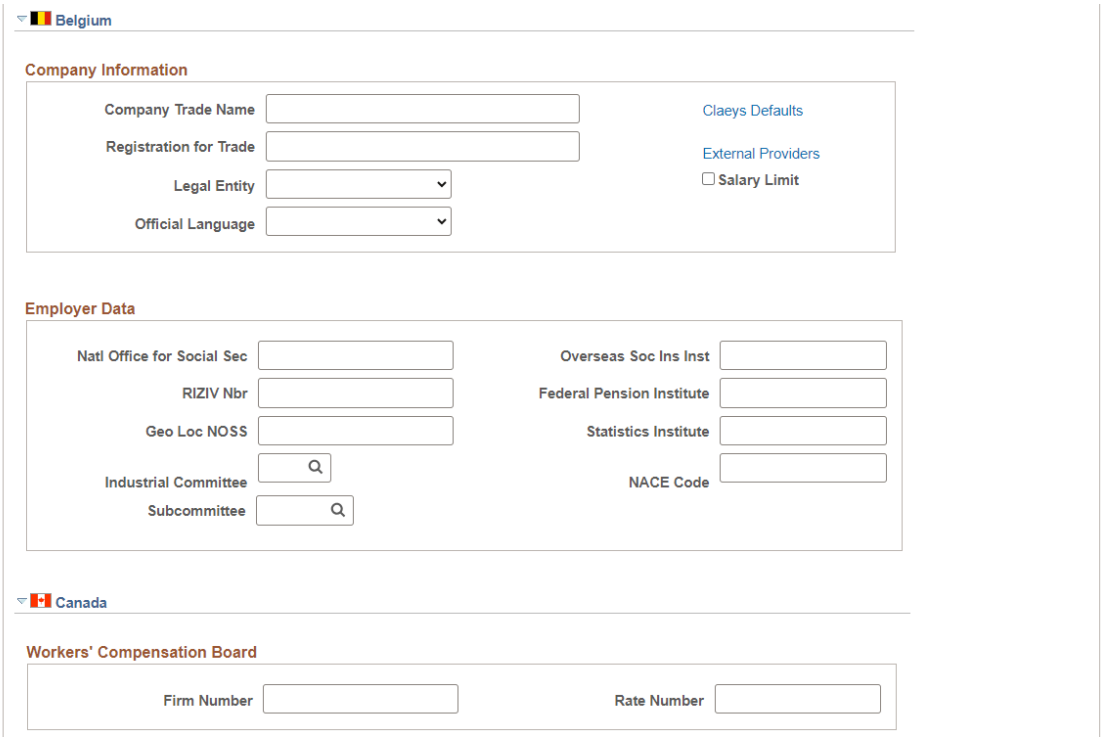
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company**, and then **Default Settings**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Federal Agency Setup** , and then **Default Settings**

This example illustrates the fields and controls on the Default Settings page (1 of 9). You can find definitions for the fields and controls later on this page.

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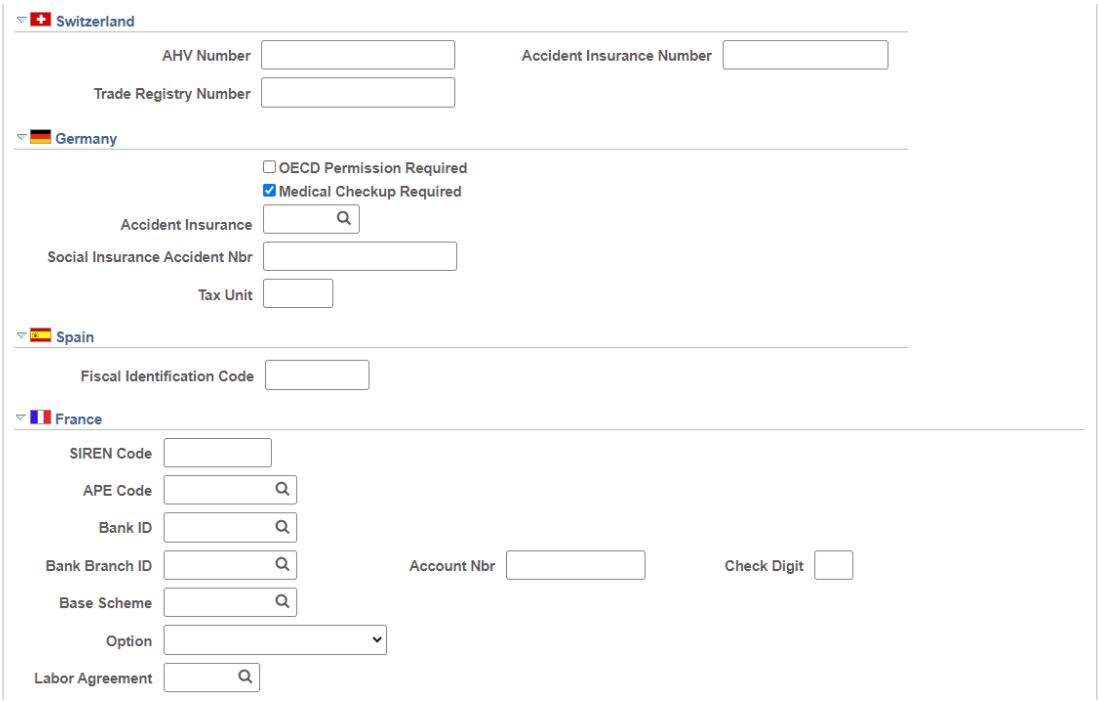


This example illustrates the fields and controls on the Default Settings page (2 of 9). You can find definitions for the fields and controls later on this page.

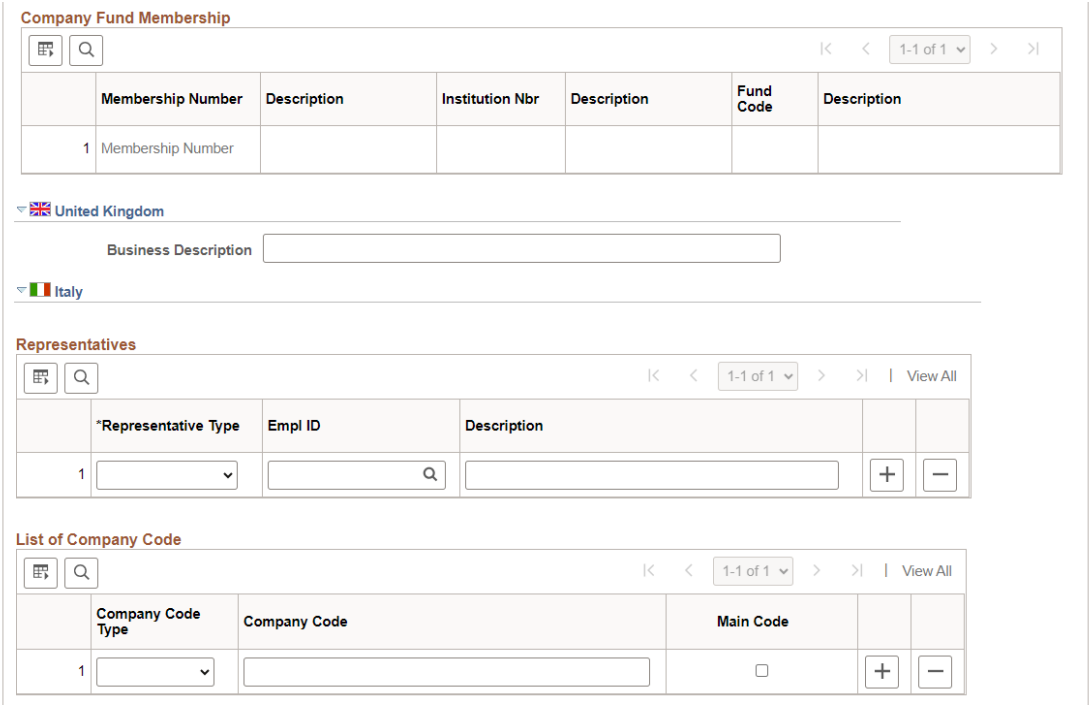


This example illustrates the fields and controls on the Default Settings page (3 of 9). You can find definitions for the fields and controls later on this page.

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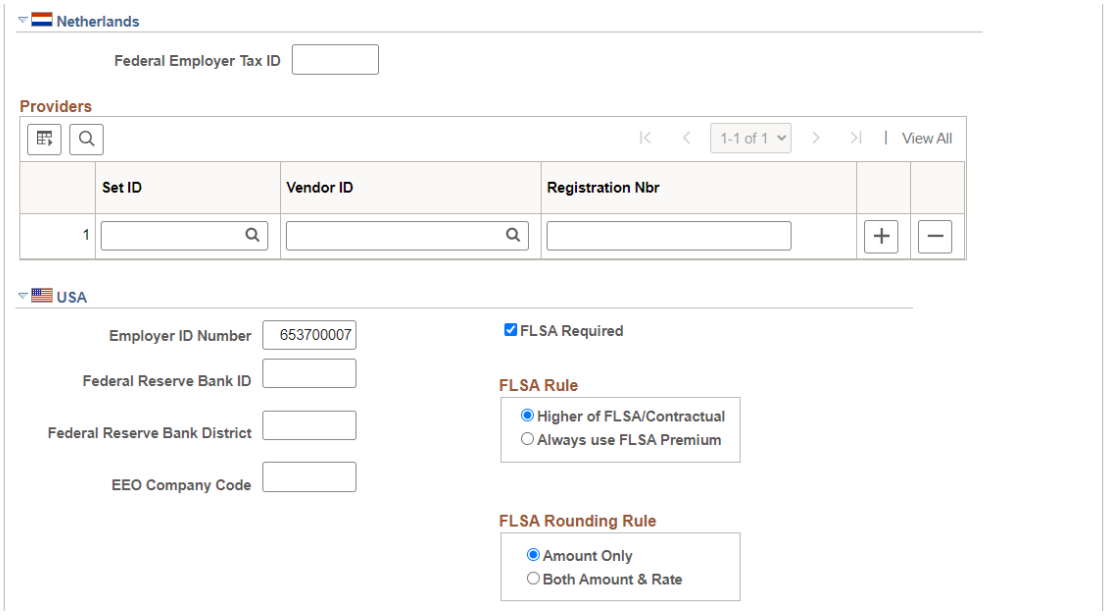


This example illustrates the fields and controls on the Default Settings page (4 of 9). You can find definitions for the fields and controls later on this page.

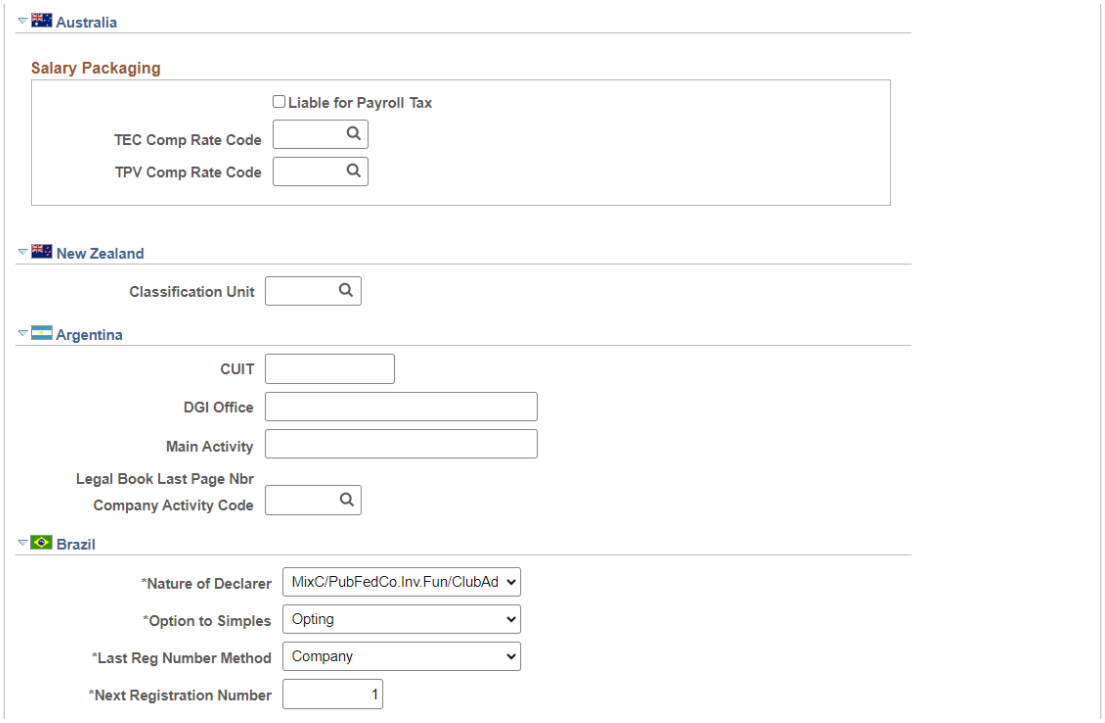


This example illustrates the fields and controls on the Default Settings page (5 of 9). You can find definitions for the fields and controls later on this page.

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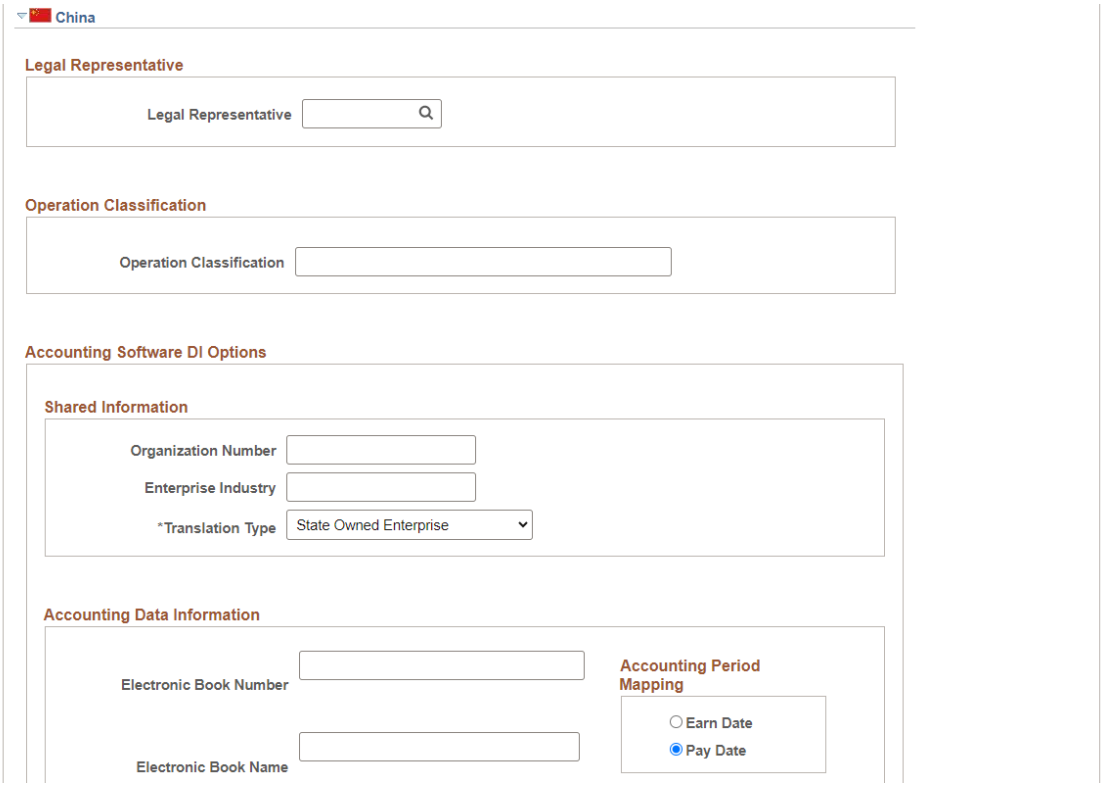


This example illustrates the fields and controls on the Default Settings page (6 of 9). You can find definitions for the fields and controls later on this page.

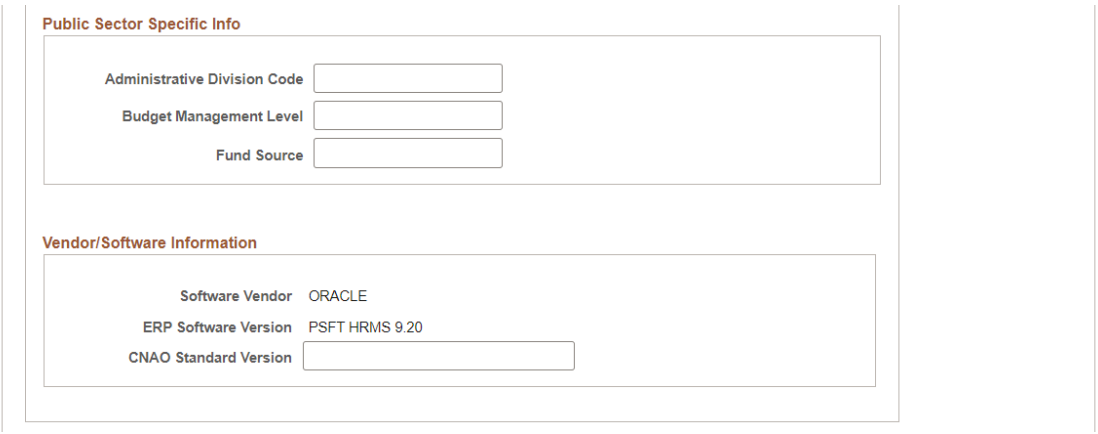


This example illustrates the fields and controls on the Default Settings page (7 of 9). You can find definitions for the fields and controls later on this page.

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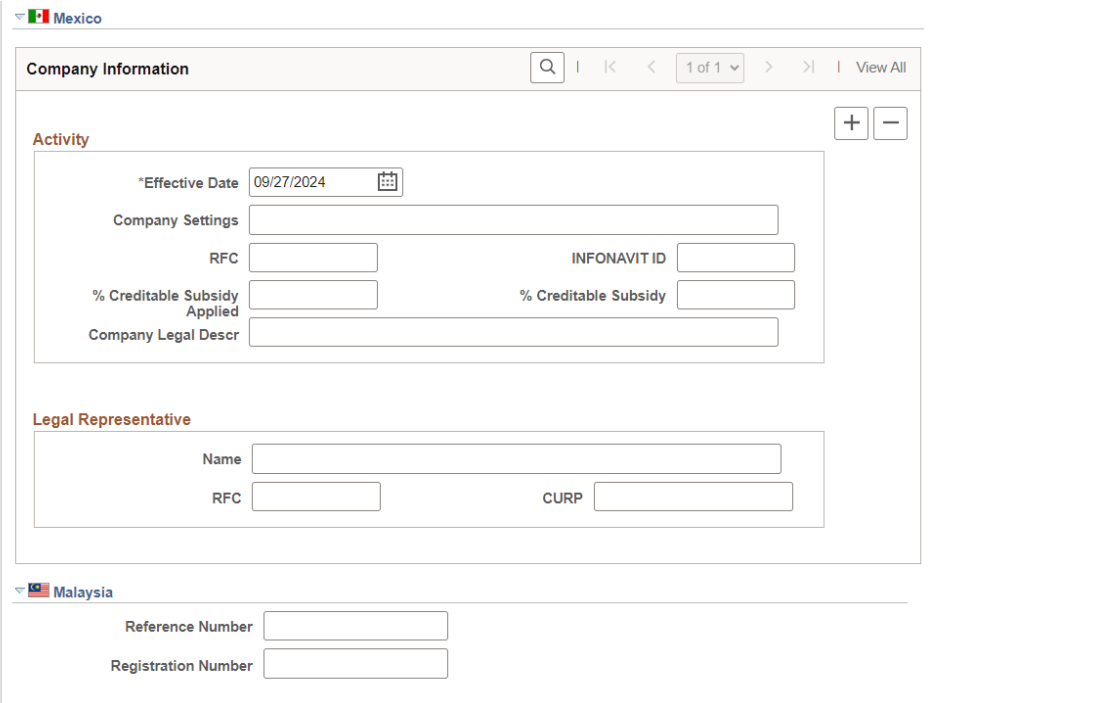


This example illustrates the fields and controls on the Default Settings page (8 of 9). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Default Settings page (8 of 9). You can find definitions for the fields and controls later on this page.

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Default Settings

Field or Control	Description
Points Value	Enter the monetary value of your points.
Enable Phased Retirement	(USF) Select this check box to enable Phased Retirement tracking for an agency. When this option is selected, you can enter an action of *PRT* (Phased Employment/Phased Retirement) for an employee that has opted for phased retirement.

Payroll for North America

These fields are for companies using PeopleSoft Payroll for North America.

Field or Control	Description
Pay Group	If you enter a value in this field, the pay group appears as the default for all employees in this company. You save data-entry time at the employee level if most employees have the same pay group. **Note:** The size of this field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. First, set up your PeopleSoft Global Payroll or PeopleSoft Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.
Default Earnings Program	Select a default value for people in this company.

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Field or Control	Description
Lines on Paysheet	Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period. See PeopleSoft Payroll for North America: Understanding Earnings Tables.
Activity Days for Terminations	This field is for information purposes only.
Federal Tax Deduction Priority and **State Tax Deduction Priority**	Enter the federal and state tax deduction priorities.
Pay Taxes through AP (pay taxes through Accounts Payable)	Select to indicate if this company is tracking its taxes through Accounts Payable.
General Ledger Account Codes	Click to enter information about general ledger account codes.
Tips Processing	Click to set up the parameters for handling tips in your company's environment.
Tax Details	Click to enter FICA and tax details.

(BEL) Belgium

Field or Control	Description
Company Trade Name	Enter the name of your Belgian company; for example, Continental Commerce - Belgium.
Registration for Trade	Enter the company's official registration number from the Belgian Trade Register.
Legal Entity	A legal entity is the legal form that applies to a company: *Inc* (corporation), *Coop* (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.
Salary Limit	Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed. If your organization enforces periods where no salary increases are allowed or limits salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.
Official Language	Select the company official language. This value is used as the default person's official language, with the exception of companies located in the Brussels-Capital Region, for which the person's preferred language is used as the default.
Claeys Defaults	Click to enter Claeys default and salary factor information on the Claeys page. See (BEL) Company Table - BEL Page.

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Field or Control	Description
External Providers	Click to enter Belgian provider information for tracking third-party providers on the Providers page. See (BEL) External Providers BEL Page.

Field or Control	Description
Natl Office for Social Sec (national office for social security)	Enter the number under which the company is registered at the National Office for Social Security.
Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute)	Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
RIZIV Nbr (RIZIV number)	Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.
Geo Loc NOSS (geographic location for State Social Insurance category)	Enter the geographical location for the NOSS.
Statistics Institute	Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
Industrial Committee	Select the appropriate industrial committee for the company. You can override this value at the department level.
NACE Code	Enter the NACE code for the company. **Note:** The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Field or Control	Description
Firm Number and **Rate Number**	Enter if you are tracking Workers' Compensation Board data for Canadian workers.

(CHE) Switzerland

Field or Control	Description
AHV Number (Alters-und Hinterbliebenen Versicherung number)	Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.
Accident Insurance Number	Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.

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Field or Control	Description
Trade Registry Number	Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(DEU) Germany

Field or Control	Description
OECD Permission Required (Organization for Economic Cooperation and Development permission required)	Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.
Medical Checkup Required	Select if a medical checkup is required for your workers under German labor law.

(DEU) German Public Sector

Field or Control	Description
State (EF1)	Specify the state value for the company. It'll be used as the EF1 value in any Workforce Statistic report that is run for the company.
Area (EF2)	Specify the area value for the company. It'll be used as the EF2 value in any Workforce Statistic report that is run for the company.
Report Number (EF3)	Specify the report number value for the company. It'll be used as the EF3 value in any Workforce Statistic report that is run for the company
Employer Number	Specify the employer number for the company. The system needs this value to run the family allowance report for employees.

(ESP) Spain

Field or Control	Description
Fiscal Identification Code	Enter your company's fiscal identification code as assigned by the Spanish government.

(FRA) France

Field or Control	Description
SIREN Code (Systeme Informatique pour le Repertoire des Entreprises code)	Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.

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Field or Control	Description
APE Code (Activite Principale Exercee code)	Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.
Bank ID	Enter a bank ID and data check digit (optional).
Base Scheme	Select the base scheme for the company. Base schemes are defined on the Mandatory Base Scheme page **(Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data FRA**, and then **Base Scheme)**and are required for DADS reporting. See PeopleSoft Global Payroll for France: Understanding DADS Reporting, PeopleSoft Global Payroll for France: Understanding Global Payroll Rules for DADS, and PeopleSoft Global Payroll for France: Understanding DADS Data Structures. See PeopleSoft Global Payroll for France: Generating DADS Files.
Option	This field was previously used in DADS reporting for the previous DADS norm (DADS-TDS). However, the field is no longer used with the current DADS reporting that uses the DADS-U norm.
Company Fund Membership	This scroll area displays the pension/ contingency contracts defined for the company on the Pensions/Contingency Contracts page. Click the Membership Number link to view the contract definition. See PeopleSoft Human Resources Meet Regulatory Requirements: Pension/Contingency Contracts Page.

> **Note**
>
> The system doesn't check the format of the numbers that you enter in the fields on this page.

(GBR) United Kingdom

Field or Control	Description
Business Description	Enter the company business description. This information is used on the two local UK RIDDOR reports, which are located on the Monitor Health/Safety menu. The system prints the business description of the relevant company from the Job record of each employee.

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(ITA) Italy

Field or Control	Description
Company Code Type and **Company Code**	Enter the company code type and code that is assigned to your company by the Italian regulatory authorities.
Main Code	Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Field or Control	Description
Federal Employer Tax ID	Enter the tax ID number that is provided by the Dutch government. It is required for the wage declaration that is submitted to the Tax Authority.
Vendor ID	Select the providers that are associated with the company. For Dutch illness reporting, the system uses the vendor that has the HCM Class field on the Vendor Information page set to *I (Industrial Insurance Board Provider).* Set up vendors using the Provider/Vendor Table component (**Set Up HCM**, and then **Product Related**, and then **Benefits NLD)**. Dutch illness reporting is delivered with the Human Resources Monitor Absence business process and PeopleSoft Global Payroll for the Netherlands.
Registration Nbr (registration number)	Enter the registration number for the insurance provider, which you obtain from the provider. The registration number is a required field for the vendor that is used in Dutch illness reporting.

(USA) USA

Field or Control	Description
Employer ID Number	Specify the unique Federal Employer ID Number (EIN) associated with the company. This control becomes the default for the Employer ID State Withholding control on the Company State Tax Table. **Note:** If you choose to set up multiple companies with the same EIN, modifications must be made to the quarterly wage reports to 'roll-up' these totals (for example, TAX810XX, TAX860XX, etc.). However, for Annual W-2 reporting, employee balances can be combined using the W-2 Reporting Company feature.

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Field or Control	Description
FLSA Required	Select this option if *any* non-exempt employees in the company need to have the FLSA rate calculated for their overtime pay. If there are Pay Groups with non-exempt employees who do not need to have the FLSA rate calculated then the **FLSA Required** flag on the Pay Group should be deselect. Deselecting the **FLSA Required** on the Company component prevents you from using the FLSA calculation for all pay groups because the FLSA Required flag on the Pay Group component (PAYGROUP_TABLE) is hidden. If you select this option, also select the applicable FLSA rule to indicate when the FLSA calculated premium will apply to overtime pay, and the rounding rule to use when calculating FLSA.
Federal Reserve Bank ID	The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank (FRB) identifier assigned to this company by the FRB.
Federal Reserve Bank District	The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank District Designator indicating which FRB is doing the issuing of the bonds.
EEO Company Code (equal employment opportunity company code)	If the U.S. government has assigned this company a code for EE0-1 and VETS 100 reporting, enter the number.
FLSA Rule	Indicate when the FLSA calculated premium will apply to overtime pay. Values are: **Higher of FLSA/Contractual:** (Default) FLSA premium will apply only when it is greater than the contractual rate. **Always use FLSA Premium:** Use the FLSA premium amount regardless of the contractual rate.
FLSA Rounding Rule	Select the rounding option to use for amount and rate when calculating FLSA. Values are: **Amount Only:** (Default) FLSA Rate and Alternative Rate are not rounded to two decimal places. Unrounded rates are used in calculating earnings. After calculation, earnings are rounded to two decimal places. **Both Amount & Rate:** FLSA Rate and Alternative Rate are rounded to two decimal places. Rounded rates are used in calculating earnings. **Note:** Oracle recommends that you use the default **Amount Only** rounding option unless a change is necessary to meet your needs. Currently, there are no rounding regulations published for FLSA rates that warrant a change.

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(AUS) Australia

Field or Control	Description
Liability for Payroll Tax	Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page (PKG_PYTX_RT_TBL) are used in the package compensation calculation for your salary-packaged employees.
TEC Comp Rate Code and**TPV Comp Rate Code**	Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment. You set up your compensation rate codes on the Comp Rate Code Table page (COMP_RATECD_TBL).
Institute Code	This group box appears only if you've selected the Education & Government check box on the Installation Table component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.
Agency Code	This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

Field or Control	Description
Classification Unit	Enter the classification unit for your company. This information comes from the Class Unit Table page (CLS_UNT_TBL_NZL). The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

See PeopleSoft Human Resources Meet Regulatory Requirements: Setting Up the ARCI Table.

(ARG) Argentina

Field or Control	Description
CUIT (Código único de Identificación Tributaria)	Enter the Unique Tax Identification Code corresponding.
Legal Book Last Page Nbr	Displays the last page number for the Legal Book Report that details employees' earnings and deductions.

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(BRA) Brazil

Field or Control	Description
Nature of Declarer	Enter the legal nature of the establishment. This information is used for reporting purposes.
Option to Simples	Select an option to simples value to have the company's contributions replaced by the actual invoice contribution amounts after invoices are generated.
Last Reg Number Method (last registration number method)	Select whether the registration number of employees is to be assigned and tracked by establishment or company.
Last Reg Number (last registration number)	Displays the registration number to be assigned to the next employee who is hired, rehired, or transferred to this company. This field is available for edit if *Company* is selected as the last registration number method. The last registration number is updated in all the company's effective dated rows.

(CHN) China

For information on these fields, see PeopleSoft Global Payroll for China: Default Settings Page.

(MEX) Mexico

Field or Control	Description
Effective Date	Date from which the definition is effective.
Company Settings	Define the company's activity. Typical values are *Financial, Pharmaceutical, Manufacturing, Services, Tourism,* and *Sales.*
RFC	Enter the RFC ID for your company. The Mexican Treasury *(Secretaria de Hacienda y Credito Publico)* identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.
INFONAVIT ID	Enter the INFONAVIT ID for your company.
% Creditable Subsidy Applied	Enter the percentage of subsidy calculated according to the income paid by the company.
% Creditable Subsidy	Enter the percentage of accreditable subsidy. This value is used to calculate federal taxes.
Company Legal Descr	Enter legal company description provided by the SAT authority.
Name	Enter the name of the person who acts as the legal representative for the company.
RFC and **CURP**	Enter these values for the legal representative.

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(MYS) Malaysia

Field or Control	Description
Reference Number	Enter the company tax reference number (the Company C File Number). This number is used in Annual Statement of Tax Deductions - Malaysian CP159 report (GPMYTX05).
Registration Number	This is the company registration number, assigned by the government of Malaysia assigns to an organization to uniquely identify the company. This is used in CP39 Monthly Statement of Tax Deductions - Electronic form (GPMYTX04).

Related Topics

- PeopleSoft Human Resources Manage Labor Administration: Understanding the Works Councils Approval Business Process
- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding U.K. Regulatory Requirements
- PeopleSoft Human Resources Administer Salary Packaging: Sal Pkg Payroll Tax Rates AUS Page
- PeopleSoft Human Resources Administer Compensation: Setting Up Rate Codes
- PeopleSoft Global Payroll
- PeopleSoft Payroll for North America

(Payroll for North America) General Ledger Liability Accts Page

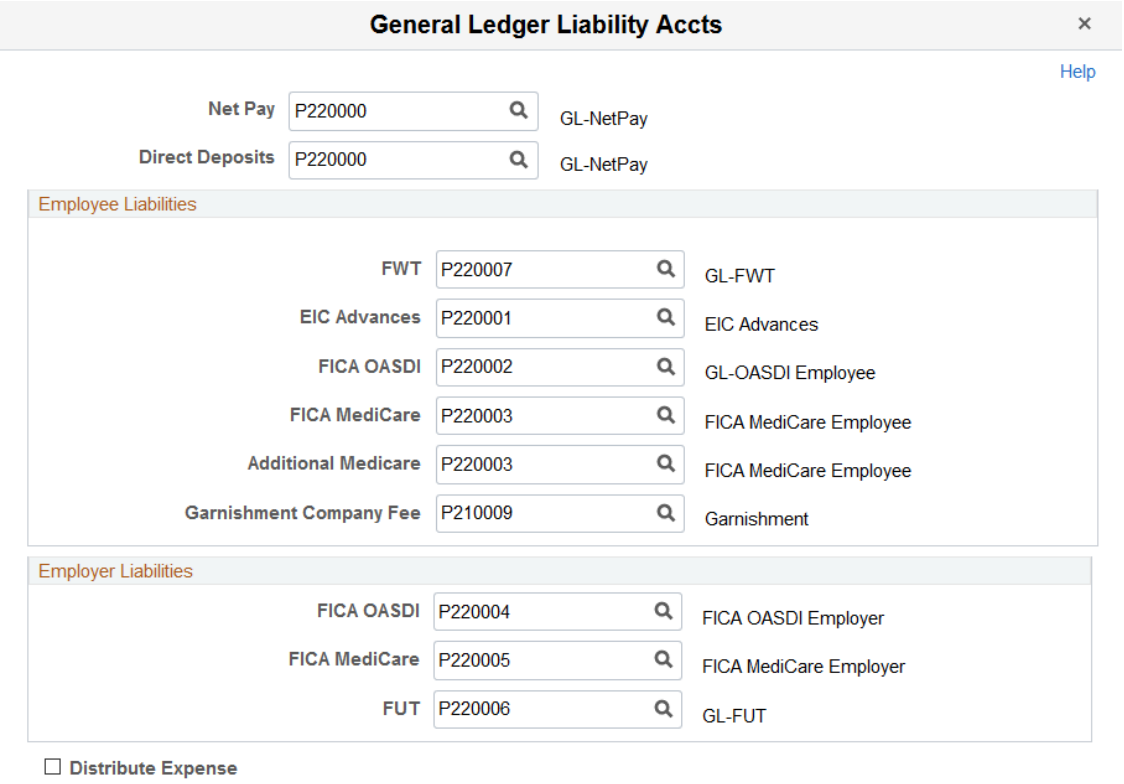
Use the General Ledger Liability Accts page (COMP_TBL7USA_SEC) to enter General Ledger account codes for net pay and direct deposits.

Navigation:

Click the **General Ledger Accounts** link on the Default Settings page.

This example illustrates the fields and controls on the General Ledger Liability Accts page for Payroll for North America.

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Select the combination codes for each liability.

The **Net Pay and Direct Deposits** fields on this page are applicable to both U.S. and Canada. The liability combination codes are related to U.S. tax accounting information only. Canadian companies use the Wage Loss Plan Table to enter GL tax accounting information.

Field or Control	Description
Distribute Expense	Select this box to distribute the cost of benefits between an employee's home department and other departments where the employee earns earnings (such as an employee who has multiple jobs). The system distributes the cost of benefits according to the percentage of total earnings that the employee earned in each department. If you do not select this check box, all expenses are distributed to the employee's home department.

See PeopleSoft Payroll for North America: (CAN) Setting Up Wage Loss Plans.

See PeopleSoft Payroll for North America: Establishing a General Ledger Account for Company Fees.

(USA) Tips Processing Page

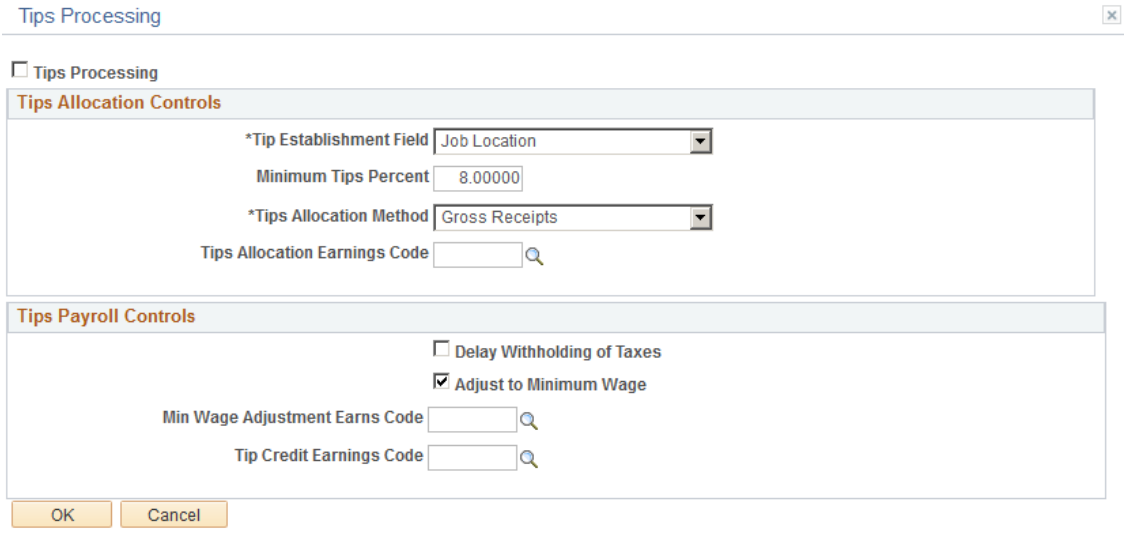
Use the Tips Processing page (COMP_TBL6USA_SEC) to set up tip allocation.

Navigation:

Click the **Tips Processing** link on the Default Settings page.

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



Field or Control	Description
Tips Processing	Select to indicate the use of this feature. Tip allocation is required when the amount of tips reported by tipped worker for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

Tips Allocation Controls

These values populate the Tip Establishment page (TIPS_ESTAB_TBL).

Field or Control	Description
Tip Establishment Field	This field designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or other unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant. You cannot override this value in the Tip Establishment page. The value selected here determines the valid values available in the **Tips Establishment ID** field on the Tip Establishment page. For example, if *Job Location* is selected here, a list of valid locations is available from the Tips Establishment ID field on the Tip Establishment page. If *Job Dept ID* is selected, a list of valid departments is available. See PeopleSoft Payroll for North America: Setting Up the Payroll System for Tip Allocation

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Field or Control	Description
Minimum Tips Percent	Enter the minimum percentage of tips to be distributed to workers. The percentage specified by the federal regulations is 8 percent. Employers can apply for a lower percentage if it can be shown in writing that the tip rate at an establishment is less than 8 percent. You can override this value in the Tip Establishment table. **Note:** The minimum tips percent value is based on federal and state regulations.
Tips Allocation Method	Select the tip allocation method used for this company. Only establishments that employ fewer than 25 employees (tipped and non-tipped) during a pay period can use the *Hours Worked* method. You can override this value in the Tip Establishment table.
Tips Allocation Earnings Code	Select the earnings code to record the amount calculated by the tip allocation process. You cannot override this value in the Tip Establishment table.

Tips Payroll Control

These values populate the Pay Group table, where you can override them.

Field or Control	Description
Delay Withholding of Taxes	Select to have the system delay withholding until the worker reports 20 USD of tips in a month federal and state taxes for each earning that is indicated for tax withholding in the Tax table.
Adjust to Minimum Wage (adjustment to minimum wage)	Select this check box unless your company has a special agreement with the Internal Revenue Service. This ensures that tipped workers receive necessary wage adjustments to bring them up to the minimum wage.
Min Wage Adjustment Earns Code (minimum wage adjustment earnings code)	Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.
Tip Credit Earnings Code	Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

(USA) Tax Details Page

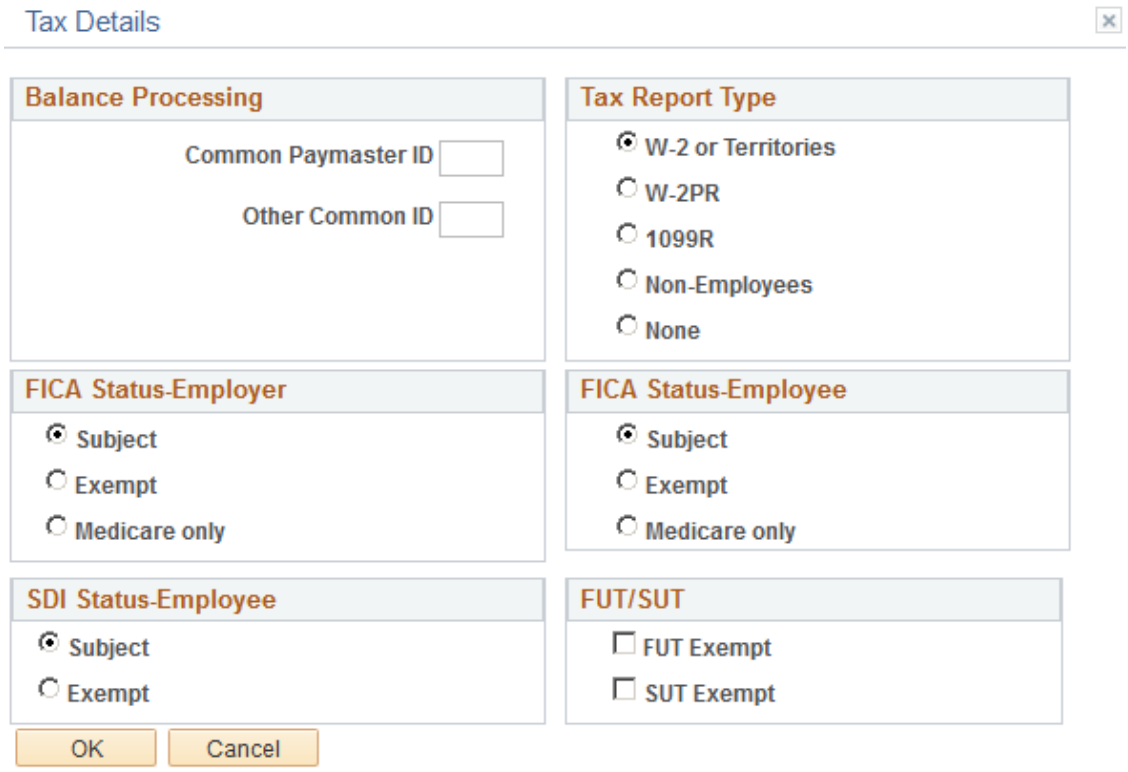
Use the Tax Details page (COMP_TBL8USA_SEC) to specify your federal employer identification number, link companies together, and define default tax status.

Navigation:

Select the **Tax Details** link on the Default Settings page.

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



Use the Balance Processing options when two or more related corporations concurrently employ one or more workers and pay them through one of the corporations as a common paymaster. By selecting these controls, the system treats simultaneous employee balances in multiple companies as one total balance when calculating payroll.

The total Social Security and Medicare taxes that must be paid are determined as if the people had one employer—the common paymaster—paying all their wages. The system will also recognize balances in all companies linked by a common paymaster when determining if a certain limit has been met—so you don't have to calculate employee balances manually.

Field or Control	Description
Common Paymaster ID	Enter a Common Paymaster ID to tell the system to treat *all employee tax, deduction, garnishment,* and *earnings balances* as one for companies sharing that Common Paymaster ID.

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Field or Control	Description
Other Common ID	Enter an Other Common ID to tell the system to treat *all employee deduction garnishment, and earnings balances* as one for companies sharing that Other Common ID. You'd typically use an Other Common ID when you need to keep your companies separate for tax purposes, but need to maintain accurate current employee balances across companies for calculating Section 415 limits, year-to-date deduction maximums, and maximum yearly earnings ceilings. Leave accrual balances are not included in Common Paymaster ID or Common Other ID processing.
Tax Report Type	This field is used by the year-end tax reporting programs. 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: • Employees must be associated with companies with one of these tax report types: – W-2 or Territories – 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. **Note:** To produce Forms W2PR for Puerto Rico in Payroll for North America, you must have paid Puerto Rico employees in one or more separate companies for the entire tax year being reported. Each Puerto Rico employee's home address must be set up with the country code *USA* and the state code *PR* for proper tax reporting. **Note:** To include retirees in your year-end reports, you must set them up in a separate 1099-R company.
FICA Status-Employer	This field is information only.
FICA Status-Employee	This information appears as a default on the Job Information page (JOD_DATA_JOBCODE).

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Field or Control	Description
SDI Status-Employee	Values are *Subject* or *Exempt*. The Automatic Employee Tax Data feature populates the **SDI Status** field on the employee State Tax Data page based on the radio button selected. **Note:** The SDI statuses of *Subject* and *Exempt* are configured at the company level. These two statuses cannot be configured at the state level using the Company State Tax Table. However, if the employees are covered by a voluntary disability plan, and the **Voluntary Disability Plan** checkbox is selected on the Company State Tax Table, the **SDI Status** field is populated with *Voluntary Disability Plan* in employee State Tax Data.
FUT Exempt	Select this option if the company is exempt from FUT.
SUT Exempt	Select this option if the company is exempt from SUT.

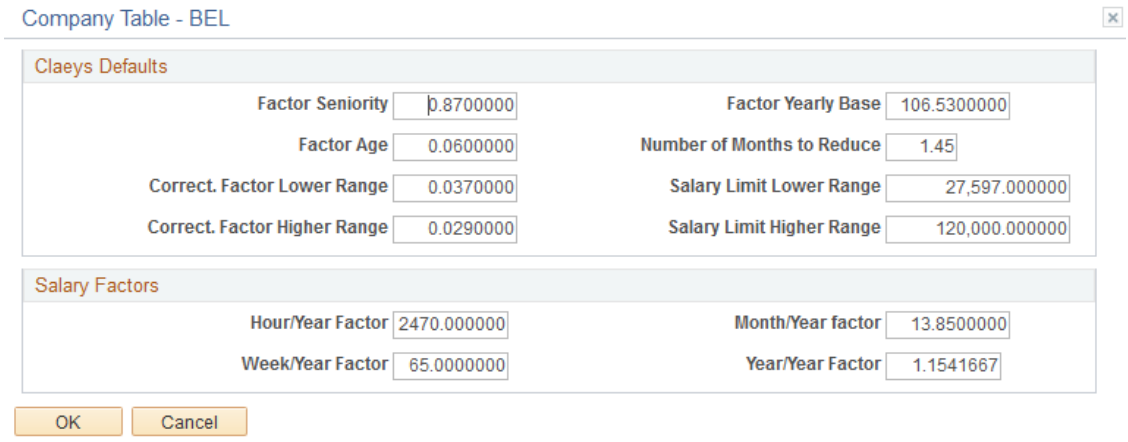
(BEL) Company Table - BEL Page

Use the Company Table - BEL page (COMP_TBL2ABEL_SBP) to enter the default information and salary factors that are used to perform Claeys formula calculations.

Navigation:

Click the **Claeys Defaults** link in the Belgium section on the Default Settings page.

This example illustrates the fields and controls on the Company Table - BEL page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Salary Limit Lover Range and **Salary Limit Higher Range**	Enter the salary limits for applying the Claeys formula.

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Field or Control	Description
Hour/Year Factor	Enter the hour/year factor to calculate the hourly amount that an worker earns and gross that amount up to the yearly total.
Month/Year Factor	Enter the month/year factor to calculate the monthly amount that an worker earns and gross that amount up to the yearly total.
Week/Year Factor	Enter the week and year to calculate the weekly amount that an worker earns and gross that amount up to the yearly total.
Year/Year Factor	Enter the year/year factor to calculate the yearly total. **Note:** In Belgium, the year factor is 13.85.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Tracking Claeys Formula Calculations

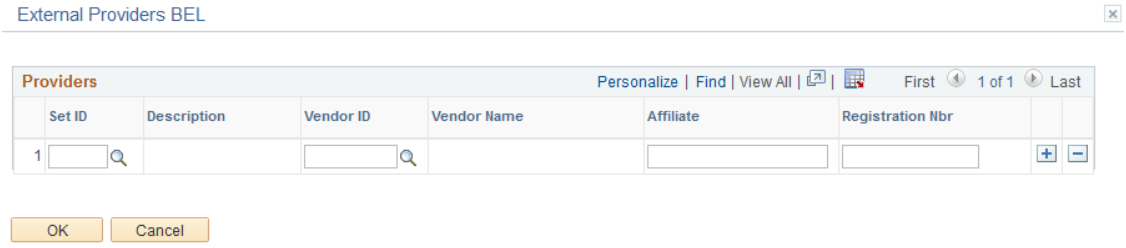
(BEL) External Providers BEL Page

Use the External Providers BEL page (COMP_TBL2BBEL_SBP) to associate a provider with a set ID.

Navigation:

Click the **External Providers** link in the Belgium section on the Default Settings page.

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



Field or Control	Description
Set ID and **Vendor ID**	Select from the list of options. The system lists all valid providers, not just Belgian providers.
Affiliate	Enter the affiliate, if applicable.
Registration Nbr (registration number)	Enter the registration number, if applicable.

Company - Phones Page

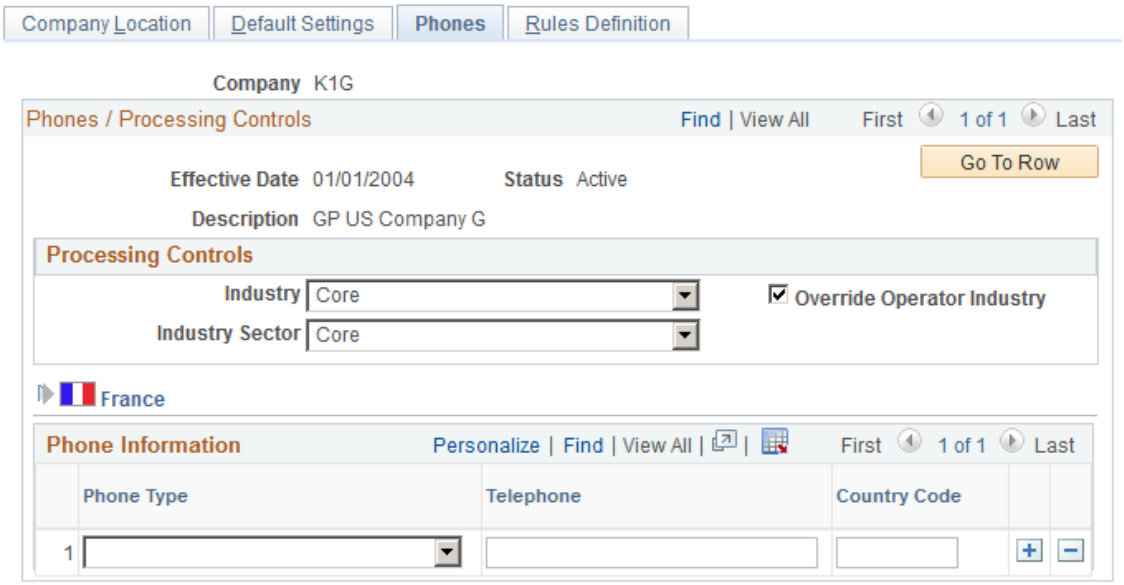
Use the Company - Phones page (COMPANY_TABLE3_GBL) to enter telephone information for a company.

Navigation:

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- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company**, and then **Phones**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company BRA**, and then **Phones**
- **Set Up HCM**, and then **Foundation Tables**, and then **Agency USF**, and then **Company**, and then **Phones**

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



Processing Controls

Field or Control	Description
Override Operator Industry	Select if the operator industry can be overridden.

(FRA) France

Field or Control	Description
Labor Agreement	Select a Labor Agreement code from the list.
Phone Type and **Telephone**	Enter the phone type, such as *Business, Home,* and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data.

Rules Definition Page

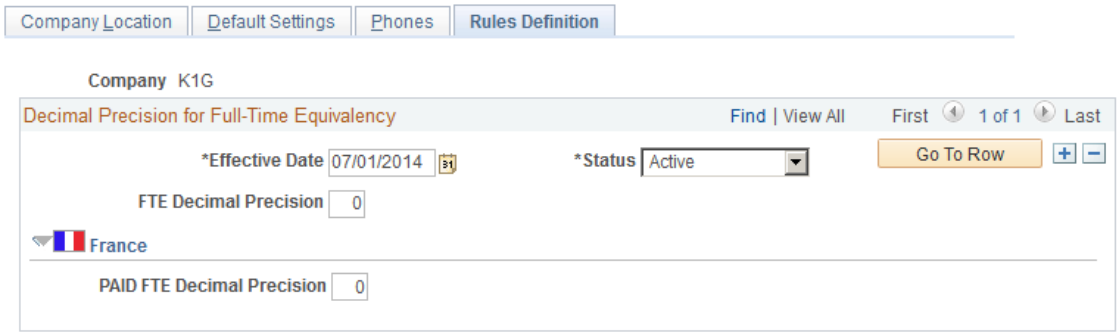
Use the Rules Definition page (COMPANY_TABLE4_GBL) to define FTE rules for the company.

Navigation:

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- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company**, and then **Rules Definition**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company BRA**, and then **Rules Definition**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Agency USF**, and then **Rules Definition**

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



Field or Control	Description
FTE Decimal Precision	Enter the number of decimal points the system will use when calculating FTE. **Note:** If you set this field to zero or leave it blank, the FTE calculations on the Job Data pages will default to 1 regardless of the number of hours entered or part/full-time status.

(FRA) France

Field or Control	Description
PAID FTE Decimal Precision	Enter the number of decimal points the system will use when calculating FTE for payment purposes.

(BRA) Company Details BRA Page

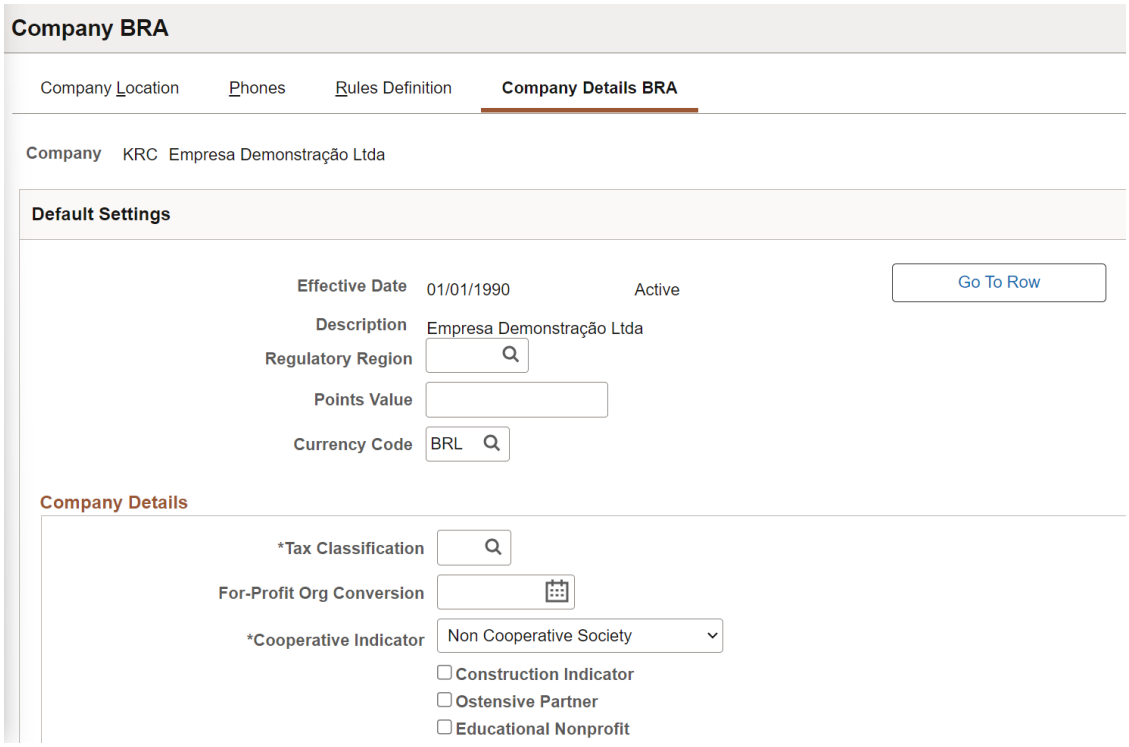
Use the Company Detail BRA page (COMPANY_TABLE_BRA) to enter company details that are specific to the country of Brazil.

Navigation:

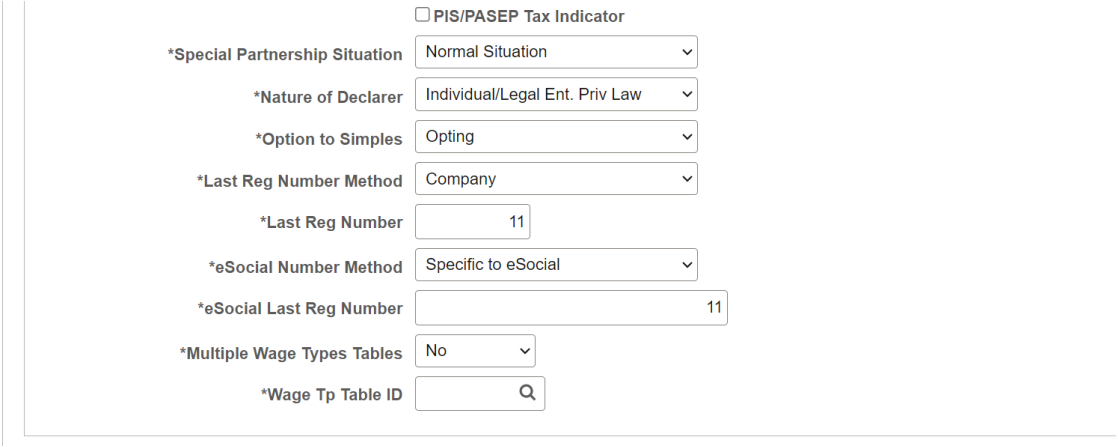
Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Company BRA**, and then **Company Details BRA**

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

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



Field or Control	Description
For-Profit Org Conversion	Enter the date on which this company changed its legal nature from non-profit to for-profit, if applicable. This field is used in eSocial reporting. If this date is specified, be sure to enter the percentage of INSS contribution due on thePeopleSoft Global Payroll for Brazil: eSocial Payroll Tax Exempt BRA Page.

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Field or Control	Description
Education Nonprofit	Select if this company has a non-profit education branch. This field is used in eSocial reporting.
eSocial Number Method	Select the method used to track eSocial register numbers. Values are *DRT Number* and *Specific to eSocial*. If the selected Last Reg Number Method field value is *Company*, both values are available for selection. If the selected Last Reg Number Method field value is *Establishment ID*, only *Specific to eSocial* becomes available; eSocial does not allow duplicate register numbers within the same company.
PIS/PASEP Tax Indicator	Indicate if this company is subject to PIS (Programa de Integração Social) or PASEP (Programa de Formação do Patrimônio do Servidor Público) tax. This information is used in eSocial S-1000 reporting.
eSocial Last Reg Number	Displays the last assigned eSocial register number. If *DRT Number* is selected, the system populates this field with the **Last Reg Number** field value. If *Specific to eSocial* is selected, the populated field value is *0* (zero).
Multiple Wage Types Tables	Select *Yes* if the company has more than one Wage Types table. This option is used if a company has different systems, in addition to the PeopleSoft payroll system, running its payroll. Select *No* if the company uses one single Wage Types table.
Wage Tp Table ID (wage type table ID)	Select the Wage Type table that is associated with the company referenced on this page. The information is used to report wage type information (earnings and deduction elements) changes (after validation) for the company in eSocial using the S-1010 event. See Also PeopleSoft Global Payroll for Brazil: Wage Types Table Page.

(USF) Entering Agency Information

To enter agency information, use the Agency USF (AGENCY_TABLE) and the Agency Table Report (RUN_FGPER803) components.

These topics provide an overview of agency information and discuss how to enter payroll information.

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Pages Used to Enter Agency Information

Page Name	Definition Name	Usage
(USF) Payroll Interface Information Page	GVT_COMPANY_TBL7	Enter the agency's payroll interface information.
Payroll Office Address Page	GVT_COMPANY_TBL8	Enter the agency's payroll office address information.
ECS Address Page (electronic certification system address)	GVT_COMPANY_TBL9	Enter the agency's ECS address information. **Note:** PeopleSoft ECS (Electronic Certification System) interface process is no longer supported as a feature to create treasury files for USF customers. It has been replaced by the Treasury Interface functionality. See PeopleSoft Payroll for North America: Setting Up Treasury Interface TAS and BETC Requirements.
Agency Table Report - Run Control page Page	PRCSRUNCNTL	Run the Agency Table report (FGPER803). This prints all agencies in the Agency component and default information, including name and address, agency code, and effective date.

Understanding Agency Information

Use the Agency component (AGENCY_TABLE) to enter information about a single agency or sub-agencies in your organization, from the central agency address to general ledger accounts, tax information, and payroll processing information. Most pages contain data from PeopleSoft Payroll for North America.

If you use only PeopleSoft Human Resources, you enter information only on the first page, the Agency Location page, for each agency that you want to add. You can also associate a default pay group with the agency on the Default Settings page. The value that you select appears as the default on the Job Data pages for workers in this agency. However, it is easiest to treat each agency that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Payroll for North America, an agency is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

If your agency uses PeopleSoft Payroll for North America, each sub-agency that you add must be equivalent to each EIN that you use. Your payroll staff needs to complete all nine pages at least once to add an agency EIN.

You can print a report of your Agency table using the Agency Table report.

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> **Note**
>
> The Agency Location, Default Settings, Phones, and Rules Definition pages in the Agency Table component are identical to those in the Company Table component and share the same object names.

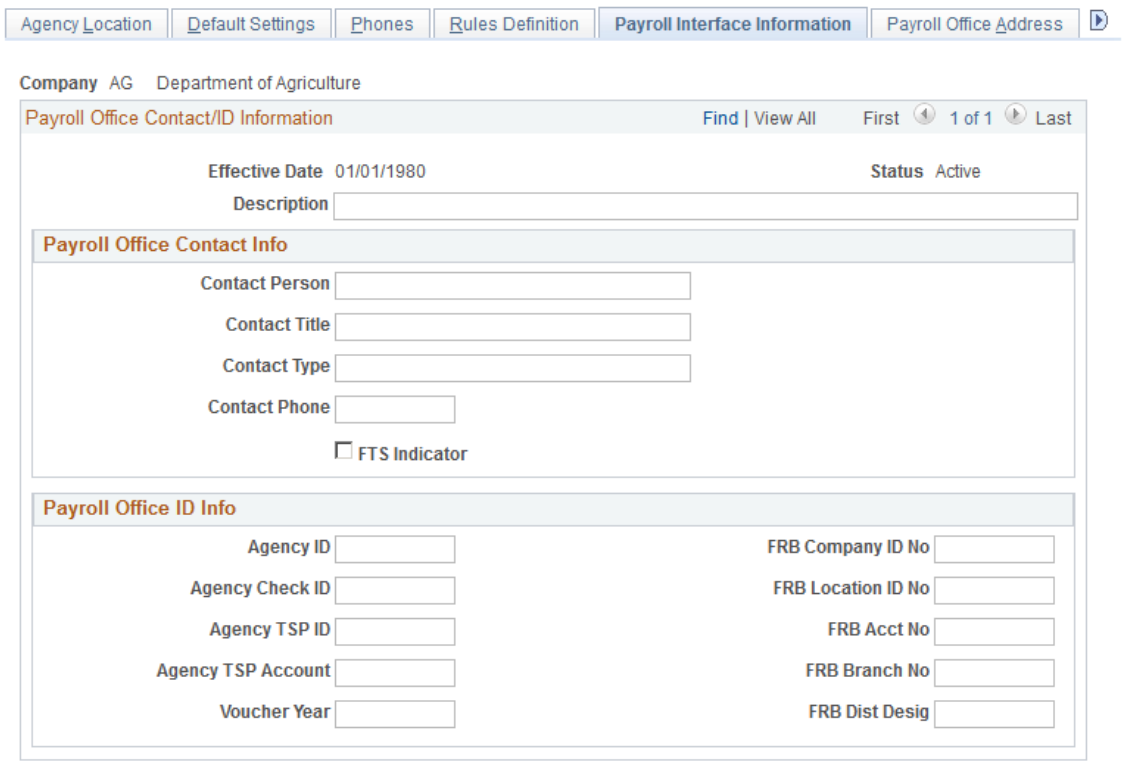
(USF) Payroll Interface Information Page

Use the Payroll Interface Information page (GVT_COMPANY_TBL7) to enter the agency's payroll interface information.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Agency USF**, and then **Payroll Interface Information**

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



Field or Control	Description
FTS Indicator	Select if the phone number is an FTS number.
FRB Company ID No (FRB company ID number), **FRB Location ID No** (FRB location ID number), **FRB Acct No** (FRB account number), **FRB Branch No** (FRB branch number), and **FRB Dist Desig** (FRB district designation)	If necessary, enter FRB information.

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Related Topics

- PeopleSoft Payroll for North America

Defining Establishments

To define establishments, use the Establishment (Define Establishment) component (ESTABLISHMENT_DATA) and Controlled Establishment Sumry component (CONTROLLED_ESTABS). Use the ESTABLISHMENT_DATA component interface to load data into the tables for the Establishment component.

These topics provide an overview of establishments and discuss defining establishment data.

Pages Used to Define Establishments

Page Name	Definition Name	Usage
Establishment Address Page	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	ESTAB_TBL2_GBL	Enter the establishment's telephone, fax machine, and other related numbers.
Controlled Establishment Sumry Page	CONTROLLED_ESTABS	Shows all establishments that have designated the selected Headquarters Unit as their Controlling Establishment.

Understanding Establishments

You use the Establishment component to define distinct physical places of business (establishments) within your company, to enter address information, and to enter regulatory reporting information. In PeopleSoft Human Resources, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.
- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

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> **Note**
>
> (USA) To support AAP reporting, locations and establishments can have a many to many relationship. Set up the relationship between establishments to locations on the Location Profile page (LOCATION_TBL2_GBL). Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding U.S. Regulatory Requirements

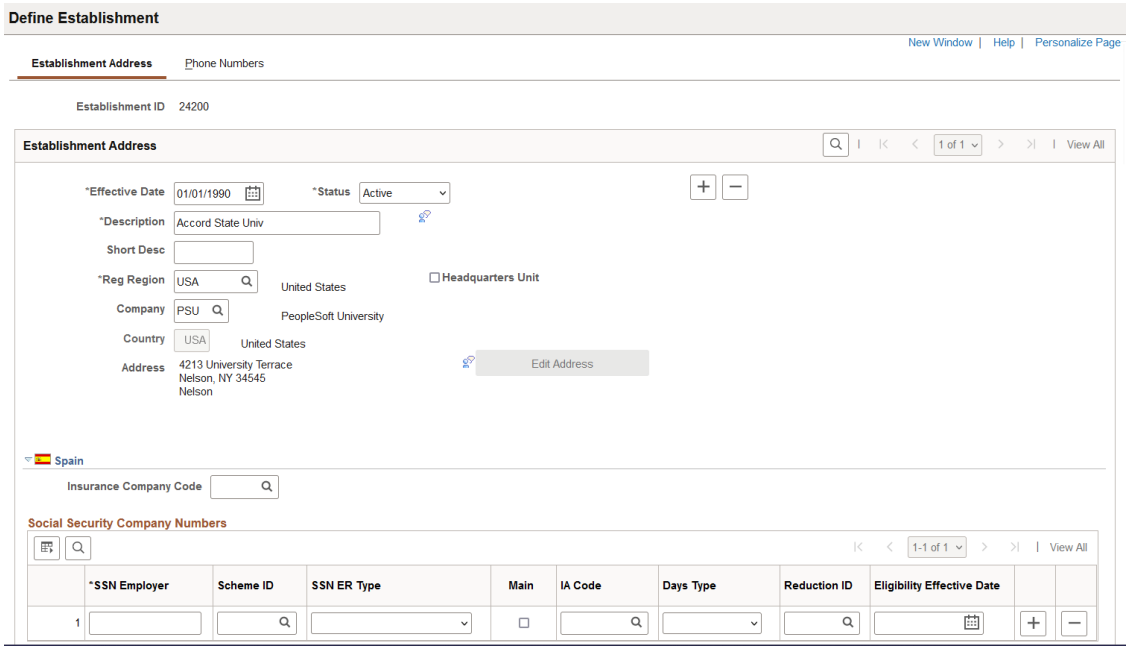
Establishment Address Page

Use the Establishment Address page (ESTAB_TBL1_GBL) to create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.

Navigation:

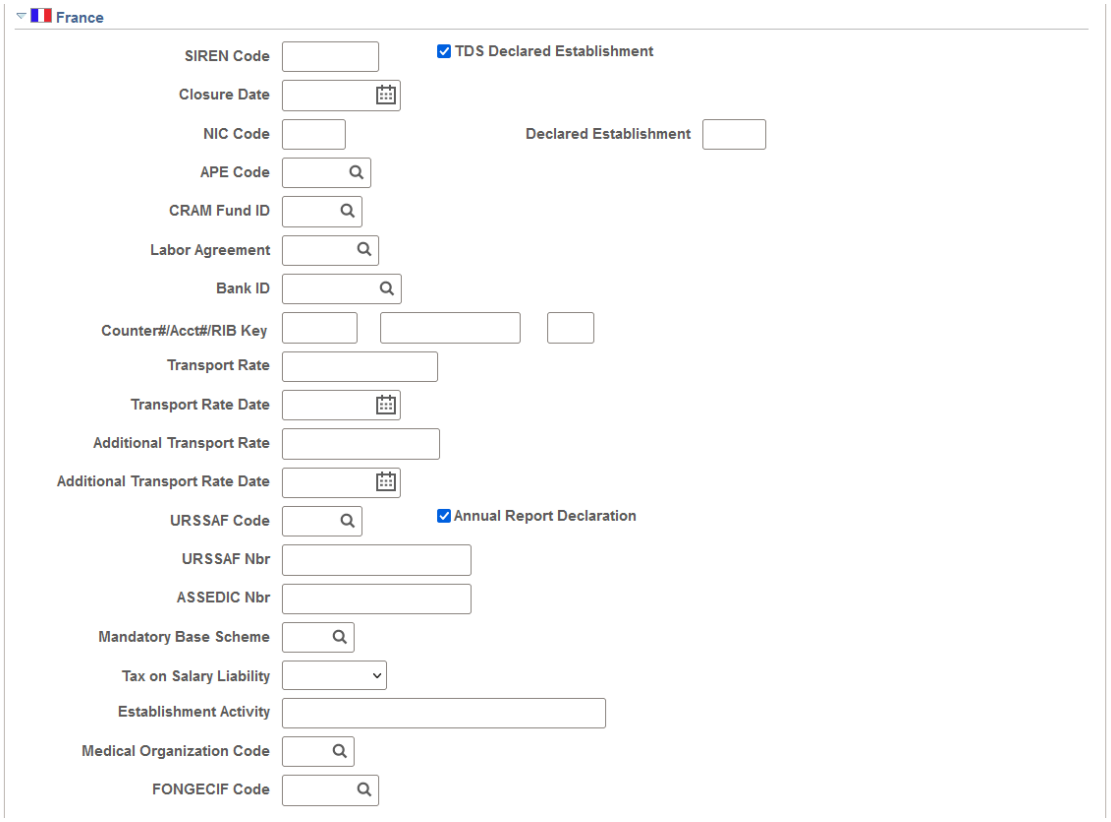
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Define Establishment**, and then **Establishment Address**
- **Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Establishment BRA**, and then **Establishment Address**
- **Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Define Regulatory Reqmts Data**, and then **Establishments**, and then **Establishment Address**

This example illustrates the fields and controls on the Establishment Address page (1 of 5).

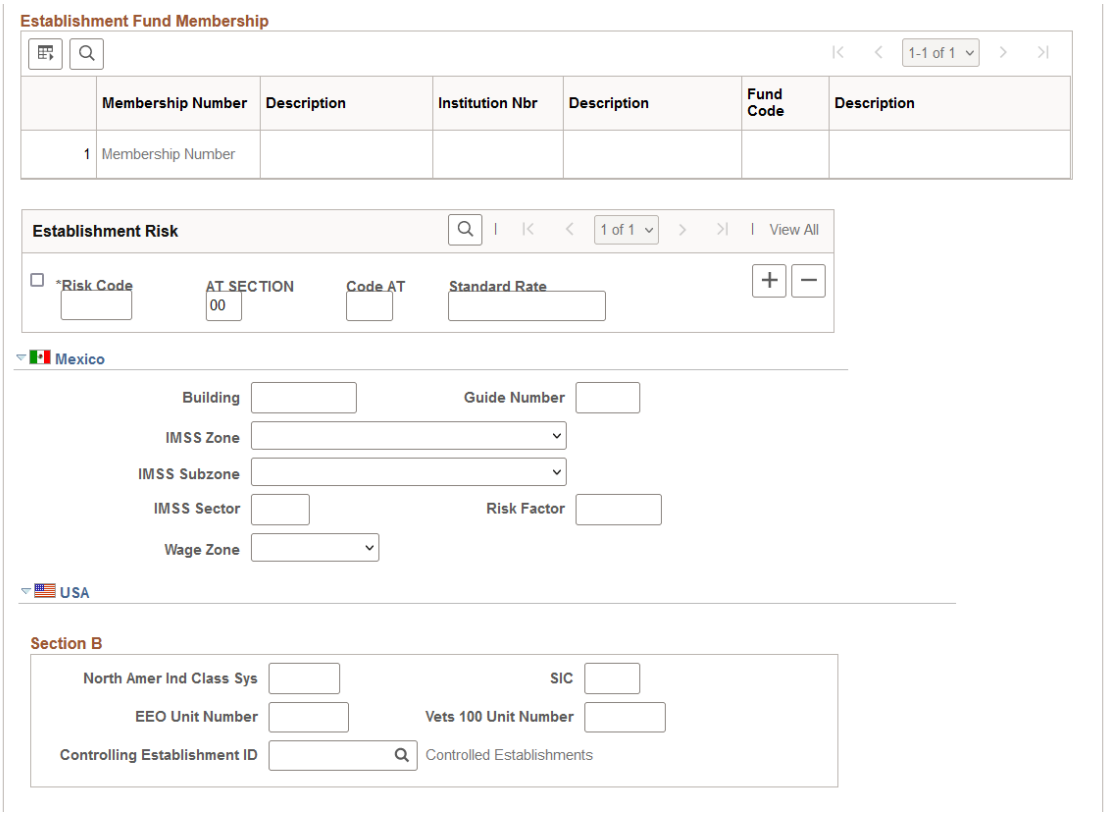


This example illustrates the fields and controls on the Establishment Address page (2 of 5).

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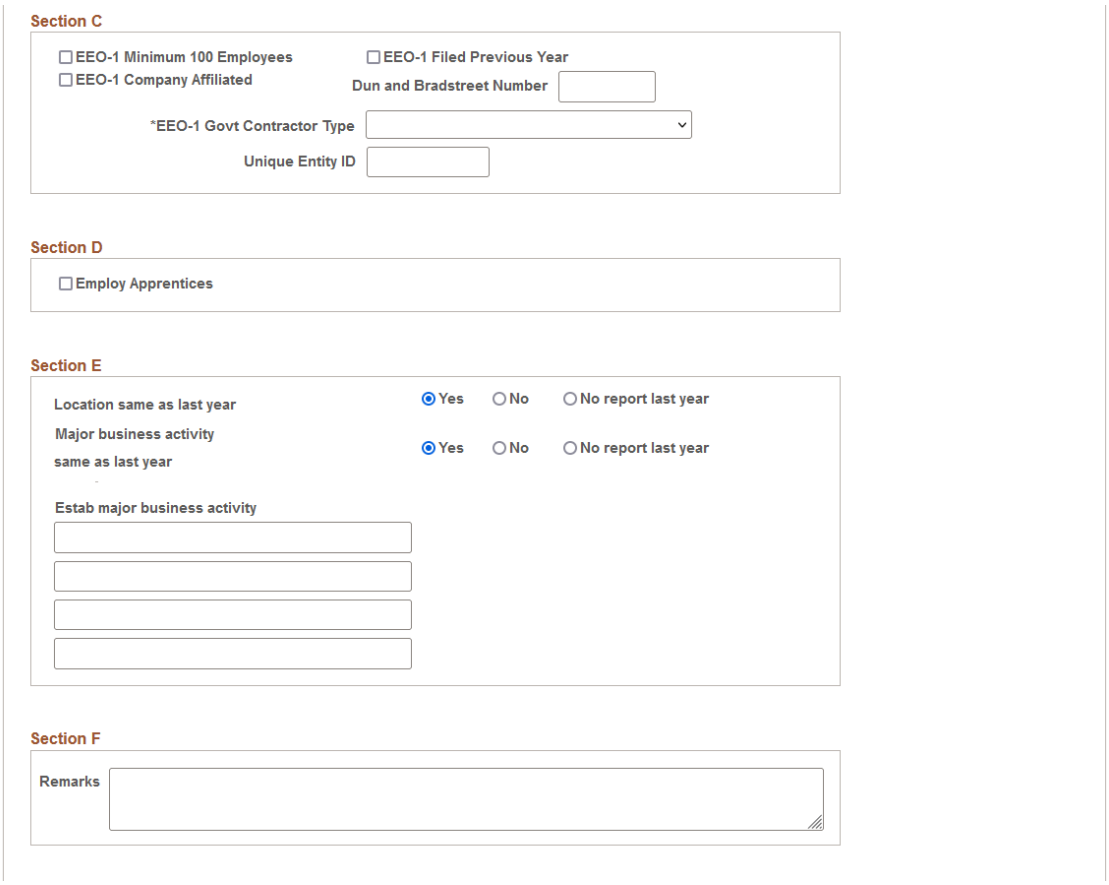


This example illustrates the fields and controls on the Establishment Address page (3 of 5).

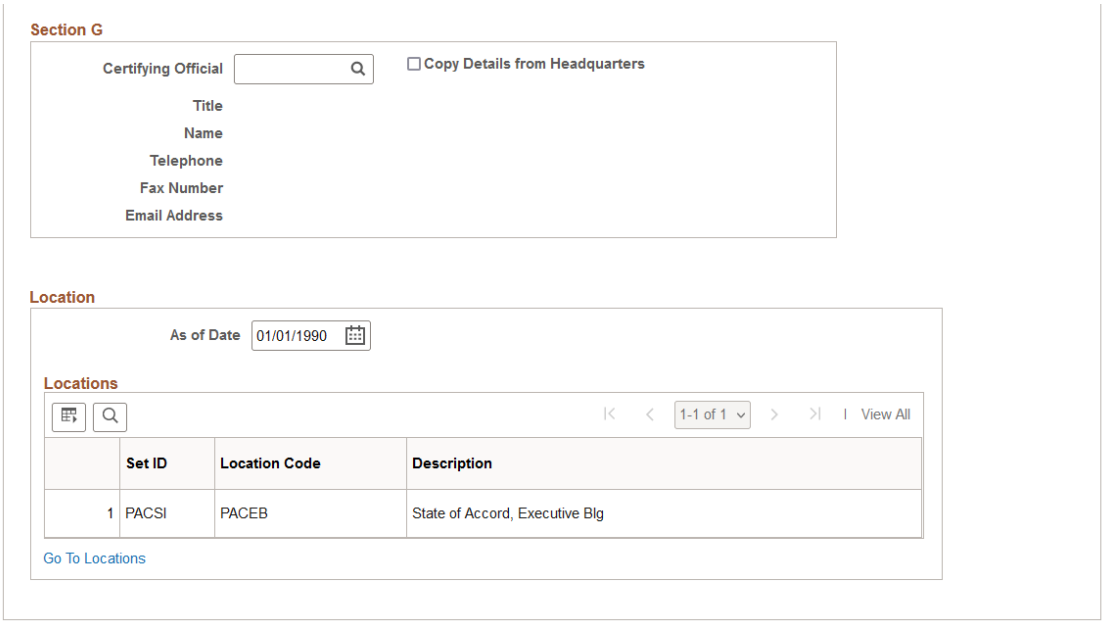


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This example illustrates the fields and controls on the Establishment Address page (4 of 5).



This example illustrates the fields and controls on the Establishment Address page (5 of 5).



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Field or Control	Description
Headquarters Unit	Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters. **Important:** (BRA) To support eSocial processing, specify only one headquarters unit for each company.

(ESP) Spain

Field or Control	Description
Insurance Company Code	Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the Insurance Company page (INSUR_COMP_CD_ESP).
SSN Employer	Enter the social security number as assigned by the Spanish government.
Scheme ID	Select the scheme id.
SSN ER Type (social security number employer type)	Select the SSN type— *Apprentice*, *Regular*, or *Training* —based on the type of contract you have with your employees.
Main	Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.
IA Code (industry activity code)	Enter the IA code, which is maintained on the Industry Activity page (INDSTRY_ACT_CD_ESP).
Days Type	Select the Days type from the available options.
Reduction ID	Select the Reduction ID from the available options.
Eligibility Effective Date	Enter the effective date of eligibility.

(FRA) France

Field or Control	Description
NIC Code (Numero Interne de Classement code). (Internal Number of Filing)	Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise.

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> **Note**
>
> The SIRET number (Systeme Informatique pour le Répertoire des Etablissements, or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE *(Institut National de la Statistique et des Etudes Economiques,* or National Institute of Statistics and Economics Information). INSEE is an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers and is used by the tax and social security authorities to identify a business enterprise and its entities.

Field or Control	Description
CRAM Fund ID (Caisse Regionale d'Assurance Maladie fund ID)	Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM (Caisse Primaire d'Assurance Maladie) offices that manage occupational health care coverage.
Counter#/Acct #/RIB Key (counter number/ account number/RIB key)	Enter the **Counter#/Acct #/RIB Key** information.
Transport Rate	Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Global Payroll uses the transport rate that you enter here.
Transport Rate Date	Enter the date of the last update to the Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Global Payroll for France.
Additional Transport Rate	Enter the additional transport rate if applicable. The transport rate is a statutory deduction and is defined by local regulations. PeopleSoft Global Payroll for France uses the additional transport rate that you enter here.
Additional Transport Rate Date	Enter the date of the last update to the Additional Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Global Payroll for France.
URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales code) and **URSSAF Nbr** (URSSAF number)	Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.
Mandatory Base Scheme	Select the Social Security code for DADS.
Tax on Salary Liability	Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.

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Field or Control	Description
Establishment Activity and **Medical Organization Code**	Enter an establishment activity and select a medical organization code. Medical organization codes are defined on the Medical Organizations page (**Set Up HCM**, and then **Product Related**, and then **Workforce Monitoring**, and then **Regulatory Requirements FRA**, and then **Medical Organizations**). These fields are used for Single Hiring Statement reporting. See PeopleSoft Human Resources Meet Regulatory Requirements: Running Workforce Reporting Statutory Reports.

Establishment Fund Membership

This scroll area displays details of the pension/contingency funds defined for the establishment on the Pension/Contingency Contracts page. Click the **Membership Number** link to view the pension/contingency contract definition.

Establishment Risk

Field or Control	Description
Risk Code	Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.
AT SECTION (Section Accident du Travail section) (Work Accident Section)	System-displayed information that you need to identify the risk code by establishment.
Standard Rate	Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Field or Control	Description
Building	Enter the building for your establishment's address.
Guide Number	Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.
IMSS Zone, IMSS Subzone, and **IMSS Sector**	Select the IMSS zone, subzone, and sector for your establishment's location. The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.
Risk Factor	Enter the risk factor that's used for IMSS tax calculation.

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Field or Control	Description
Wage Zone	Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are *A Zone*, *B Zone*, and *C Zone*.

(USA) USA

Enter information in the following USA-specific sections.

Section B

Field or Control	Description
North Amer Ind Class Sys [North American Industrial Classification System (NCIS)], **Controlling Establishment ID, SIC** (Standard Industrial Classification), and **Vets 100 Unit Number**	Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

Field or Control	Description
EEO-1 Minimum 100 Employees and **EEO-1 Company Affiliated**	Select if they apply to this establishment.
EEO-1 Filed Previous Year	Selected by default. If you didn't file an EEO-1 report for this establishment last year, deselect this check box.
Unique Entity ID	**Note:** This field is required if the employer is a federal contractor. Enter the Unique Entity ID (UEI) for any headquarter or non-headquarter establishment that is designated as a federal contractor (i.e., Federal Contractor Designation).

Section E

Field or Control	Description
Location same as last year	Select **Yes** or **No** to indicate whether your location is the same as last year, or select **No Report** if you made no report last year.
Major business activity: same as last year	Select **Yes** or **No** to indicate whether your business activity is the same as last year; or, select **No Report** if you made no report last year.
Estab major business activity (establishment's major business activity)	Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Section F

Use the **Remarks** group box to enter comments.

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> **Note**
>
> Commas are not permitted in this section.

> **Note**
>
> To maintain historical information, you should add a new effective dated row for the establishment when you make changes to the comments.

Section G

Field or Control	Description
Certifying Official	Select the name of the certifying official.
Copy Details from Headquarters	Select to copy details from headquarters.

Location

Field or Control	Description
As of Date	Select a date to view which locations are associated with this establishment at a certain point in time.
Set ID, Location Code, and **Description**	View the location codes associated with this establishment on the Location Profile page.
Go To Locations	Click to access the Location component. The system will open the component with the same action you are in on the Establishments component. When you save or cancel your changes on the Locations component, the system returns you to the Establishment (Define Establishment) component.

Related Topics

- Establishing Locations
  To establish locations, use the Define Location (LOCATION_TABLE) and the Location Table Report (RUN_PER705) components. Use the LOCATION_TABLE component interface to load data into the tables for the Location component.
- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding U.S. Regulatory Requirements

Establishment - Phone Numbers Page

Use the Phone Numbers page (ESTAB_TBL2_GBL) to enter the establishment's telephone, fax machine, and other related numbers.

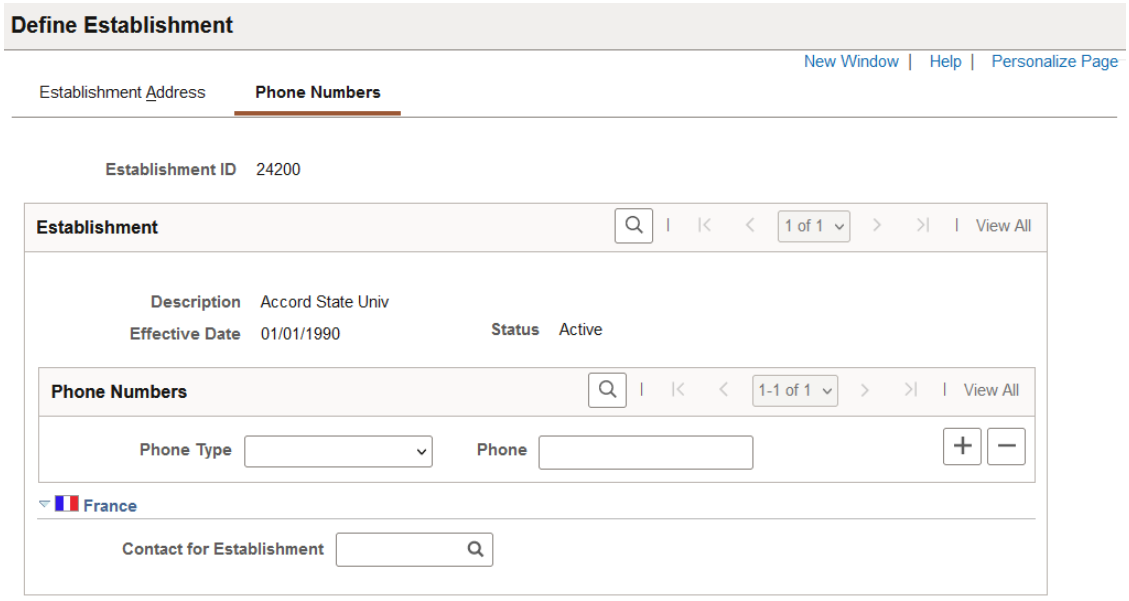
Navigation:

- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Define Establishment**, and then **Phone Numbers**

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- **Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Establishment BRA**, and then **Phone Numbers**
- **Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Define Regulatory Reqmts Data**, and then **Establishments**, and then **Phone Numbers**

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



Field or Control	Description
Phone Type and **Phone**	Enter phone information for this establishment.

(FRA) France

Field or Control	Description
Contact for Establishment	Select the contact for this establishment.

Establishing Locations

To establish locations, use the Define Location (LOCATION_TABLE) and the Location Table Report (RUN_PER705) components. Use the LOCATION_TABLE component interface to load data into the tables for the Location component.

These topics provide an overview of locations and discuss establishing locations.

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Pages Used to Establish Locations

Page Name	Definition Name	Usage
Location Address Page	LOCATION_TABLE1	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Business Units by Location Page	LOC_BU_SEC	View a list of the business units that use this set ID.
Location - Phone Number Page	BUS_PHONE_SEC	Enter phone numbers for the location addresses.
Location Profile Page	LOCATION_TBL2_GBL	Specify a salary administration plan for the location, as well as tax, establishments and local country information.
Location Details BRA Page	LOCATION_TBL_BRA	Define details for geographic locations in Brazil.
Location Table Report - Run Control Page	PRCSRUNCNTL	Run the Location Table report (PER705). This report lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).

Understanding Locations

Use the Locations component to establish physical locations in your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Global Payroll, you may want to report certain information by location, so consider this when planning your implementation of this information.

If you use PeopleSoft Pension Administration, you can create one or more locations specifically for pension payees. You can use a single *retiree location* for all retirees if you don't need to report on your payees based on more specific location information.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations component. In career planning, for example, you can assign training courses to locations. In recruitment, job openings are associated with locations, either directly or indirectly through the link between a location and a separate recruiting object known as a recruiting location.

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> **Note**
>
> (USA) To support AAP reporting, when you select a regulatory region with a country value of USA on the Location Profile page, the system enables you to establish a many to many relationship between locations and establishments. Set up the relationship on the Location Profile page in the USA section of the page. Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

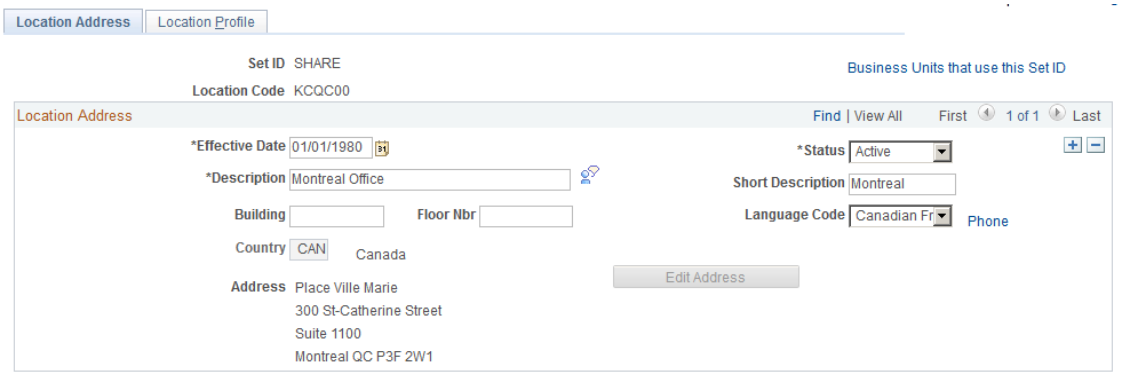
Location Address Page

Use the Location Address page (LOCATION_TABLE1) to enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.

Navigation:

- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Define Location**, and then **Location Address**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Location BRA**, and then **Location Address**

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



Field or Control	Description
Building	Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.
Floor Nbr (floor number)	Enter the floor number, if applicable.
Language Code	Select the code for the official language used at this location.
Phone	Click this link to enter phone numbers.

Location Profile Page

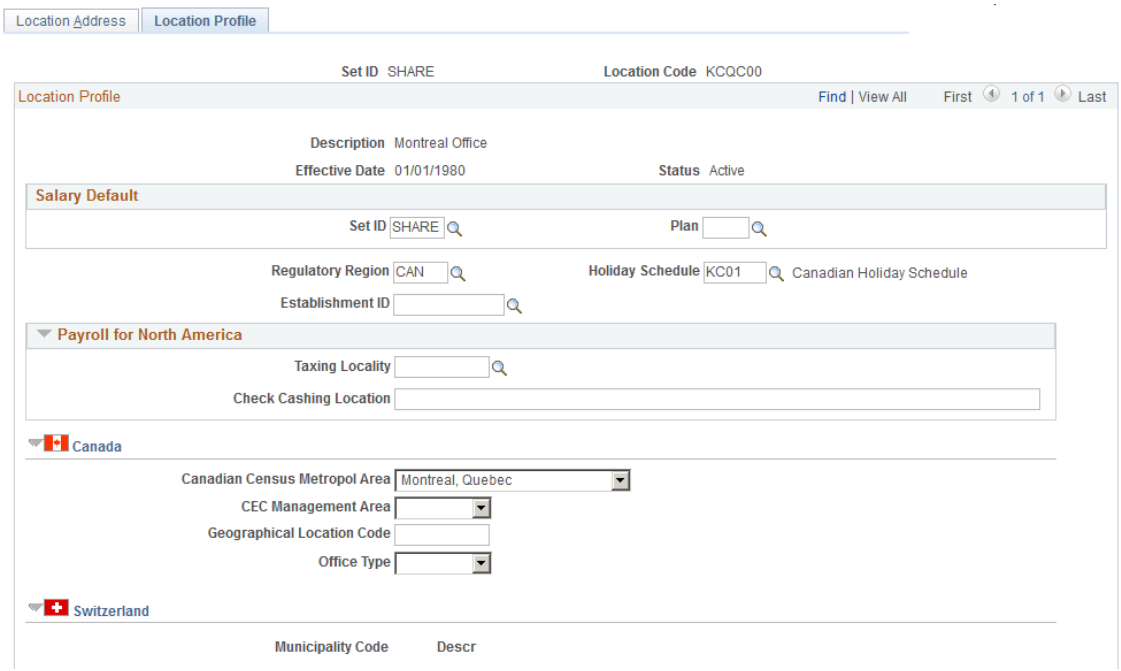
Use the Location Profile page (LOCATION_TBL2_GBL) to specify a salary administration plan for the location, as well as tax, establishments and local country information.

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Navigation:

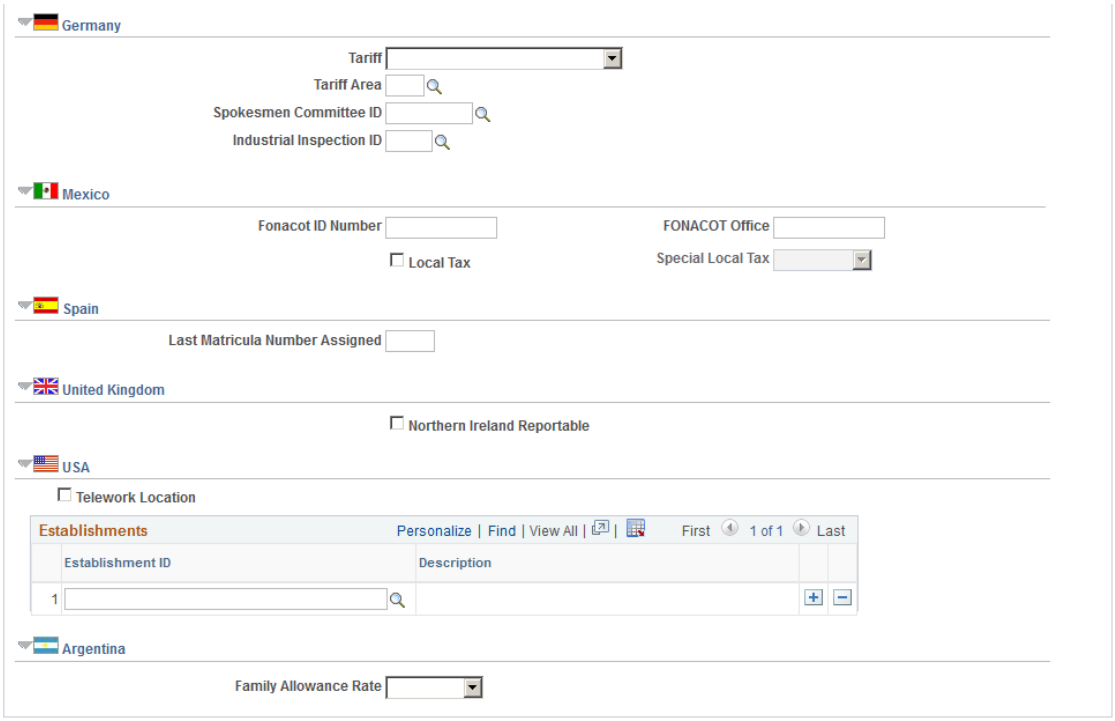
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Define Location**, and then **Location Profile**
- **Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Location BRA**, and then **Location Profile**

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

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You enter U.S. tax information for Canadian and German locations on this page.

> **Note**
>
> PeopleSoft Payroll for North America references the Tax Location Table for location information, and PeopleSoft Pension Administration references the PeopleSoft Payroll for North America tax information. For more information about the relationship between the Locations component and the Tax Location Table in PeopleSoft Payroll for North America, see the PeopleSoft Payroll for North America documentation.

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Field or Control	Description
Set ID and **Plan**	Select a salary administration plan from the values that you created on the Salary Plan component. See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Setting Up Salary Plans, Grades, and Steps. Tying a salary administration plan for a location helps you distinguish currency and cost-of-living differences for workers with the same job code. If you don't need to distinguish salary administration plans by location, leave this field blank. **Note:** Select only the plans that are associated with the set ID that you selected on the Define Salary Plan component. If you select a salary administration plan on this page, the system uses that plan as the default value on the Job Data pages for the people in this location. Otherwise, it uses the salary administration plan that you enter on the Job Code Table. See Classifying Jobs.

Field or Control	Description
Regulatory Region	Enter the regulatory region that is associated with this location. **Note:** (USA) If you select a regulatory region with a country value of USA, the system will hide the Estab ID field. To associate establishments with this location, use the Establishments fields in the USA section of this page.
Holiday Schedule	Select a holiday schedule for this location. **Note:** If you use PeopleSoft Payroll for North America, the holiday schedule you select here is the default holiday schedule assigned to workers on the Job Data – Payroll page (JOB_DATA2). If you leave this field blank, the default holiday schedule comes from the Pay Group component. If you use PeopleSoft Global Payroll, the holiday schedule on this page is for informational purposes only; assigned pay groups control the default holiday schedule for processing. See Setting Up Holiday Schedules.
Establishment ID	Select an establishment ID to associate with this location. **Note:** (USA) If you select a Reg Region value with a country value of *USA*, the system hides this field. Set up establishments for U.S. locations in the USA section of this page.

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Payroll for North America

Field or Control	Description
Taxing Locality and **Check Cashing Location**	Select a taxing locality and check cashing location. This field is for information only.

(CAN) Canada

Field or Control	Description
Canadian Census Metropol Area (Canadian Census Metropolitan Area)	Select the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada for this location. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.
CEC Management Area (Canada Employment Center Management Area)	Select from the list of options.
Geographical Location Code	Enter the geographic location code as defined by Statistics Canada.

> **Note**
>
> (CAN) If the Official Languages Act applies to your organization, use the information in the Geographic Location Code, Office Type, TBS Office Code, and National Capital Region fields as part of the Official Languages reports (PER102CN and PER108CN) that you submit to the Canadian government. If this is a military installation, the geographic location code entered on the first page of the Military Location component, is copied to the Geographical Location code in the Canada section.

See PeopleSoft Human Resources Meet Regulatory Requirements: Understanding Regulatory Requirements for Canada.

(CHE) Switzerland

Field or Control	Description
Municipality Code	The default value is the municipality code that corresponds to the postal code of the location address. You can select a different code from the list of valid municipality codes for the canton that this location is in.

(DEU) Germany

Field or Control	Description
Tariff	Enter the *tariff*, or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.

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Field or Control	Description
Industrial Inspection ID	Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

> **Note**
>
> When you enter a person's location on the Job Data pages, the Tariff and Tariff Area values appear by default from the Locations component, based on the values that you entered on this component for the location.
>
> When you enter a person's location and labor type on the Job Data pages, the system populates the Spokesman Committee ID and Works Council ID fields. These values are based on the person's location in the Work Location page (JOB_DATA1) and the value of the Labor Type *(Management* or *Non-Management)* in the Job Labor page (JOB_LABOR).

See PeopleSoft Human Resources Manage Labor Administration: Understanding the Works Councils Approval Business Process.

(MEX) Mexico

Field or Control	Description
Fonacot ID Number	Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.
FONACOT Office	Identify the nearest FONACOT office for your location.
Tax Local	Select this check box if the location of the state is Chihuahua.
Special Local Tax	If the location of the state is Chihuahuathis field will default to Ciudad Juarez.

(ESP) Spain

Field or Control	Description
Last Matricula Number Assigned	The Spanish government requires employers to assign each people a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

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(GBR) United Kingdom

Field or Control	Description
Northern Ireland Reportable	Select if this is a Northern Ireland reportable location. Indicates that people in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

USA

Field or Control	Description
Telework Location	Select if this establishment allows workers to work remotely.
Establishments	Select one or more establishment IDs for this location. Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations. Only establishments with an effective date as of the location's effective date are available. Assign locations and establishments to people on the Job Data - Work Location page. The system will only enable you to select an establishment associated with the location you select. **Note:** If an establishment's Description is blank, the establishment has become inactive since you initially assigned it to this location. **Note:** You can view the locations associated with an establishment on the Establishment Address page.

(DEU) German Public Sector

Field or Control	Description
Municipality	Specify the municipality for locations used in German Public Sector.

See Also PeopleSoft Human Resources Manage German Public Sector: Municipality Table Page

(ARG) Argentina

Field or Control	Description
Family Allowance Rate	Select the family allowance rate from these values: *General, Zone 1, Zone 2, Zone 3* and *Zone 4*.

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Related Topics

- PeopleSoft Payroll for North America

Establishing Military Locations

To establish military locations, use the Military Geographic Location (GVT_LOCATION_TBL) and Military Location (LOCATION_TABLE_MIL) components.

These topics discuss establishing military locations.

Pages Used to Establish Military Locations

Page Name	Definition Name	Usage
Military Geographic Location Page	GVT_LOCATION	Define geographic locations.
Military Location - Location Address Page	LOCATION_TABLE_MIL	Enter military locations and associate them to geographic locations.

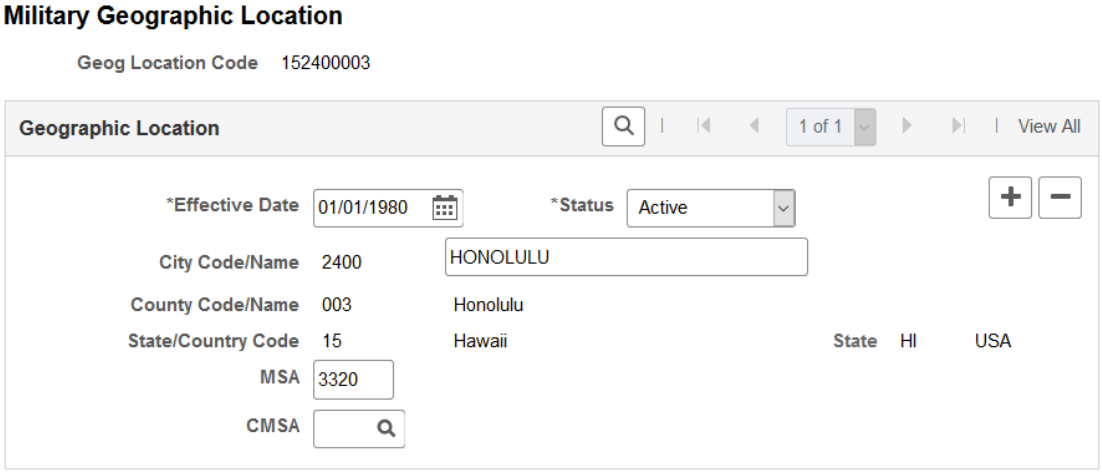
Military Geographic Location Page

Use the Military Geographic Location page (GVT_LOCATION) to define geographic locations.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Military Geographic Location**, and then **Military Geographic Location**

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



Field or Control	Description
City Code/Name	The system assigns a city code. Enter the city name.

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Field or Control	Description
CBSA (core based statistical area)	This value is supplied by the OPM data file. It is blank if the duty station is not in a CBSA. This field is labeled **MSA** for effective dates before February 2, 2005.
CSA (combined statistical area)	This value is supplied by the OPM data file. It is blank if the duty station is not in a CSA. This field is labeled **CMSA** for effective dates before February 2, 2005.

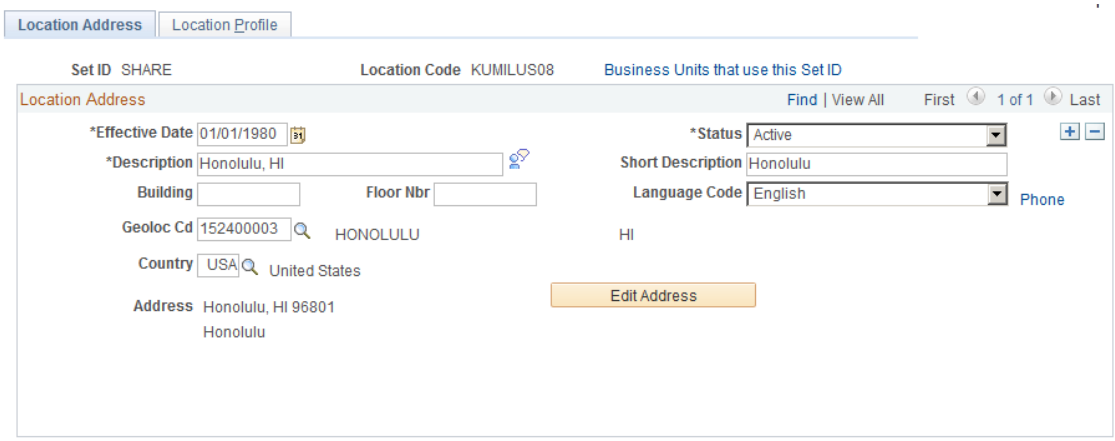
Military Location - Location Address Page

Use the Military Location - Location Address page (LOCATION_TABLE_MIL) to enter military locations and associate them to geographic locations.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Military Location**, and then **Location Address**

This example illustrates the fields and controls on the Military Location - Location Address page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Geoloc Cd (geographic location code)	Select the geographical location code.

See Location Address Page.

(USF) Establishing Federal Locations

To establish Federal locations, use the Locality Pay Area Table USF component (GVT_LOCPAY_AREA_TB), the Geographic Location component (GVT_LOCATION_TBL), the Location USF component (LOCATION_TABLE), the Work Location Reports USF component (RUN_FGPER817), the Geographic Location Report USF component (RUN_FGPER802), and the Locality Pay Area Report (RUN_FGPER807).

These topics provide an overview of and discuss establishing federal locations.

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(USF) Pages Used to Establish Locations

Page Name	Definition Name	Usage
Locality Pay Area Table Page	GVT_LOCAREA_TABLE	Define the regions where federal workers receive additional pay above their base pay.
Geographic Locations USF Page	GVT_LOCATION	Define geographic locations.
Location USF - Locations Address Page	GVT_LOC_TABLE1	Add work locations.
Run Control Page	PRCSRUNCNTL	Run the Work Location Table, Geographic Location Table, and Locality Pay Area Table reports. • Work Location Table report (FGPER817) prints a detailing of the Work Location Table. • Geographic Location Table report (FGPER802) produces a detailing of the Geographic Location Table. • Locality Pay Area Table report (FGPER807) prints information for every Locality Pay Area.

Understanding Federal Locations

Use the Locations USF component to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations USF component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to specific locations.

Locality Pay Area Table Page

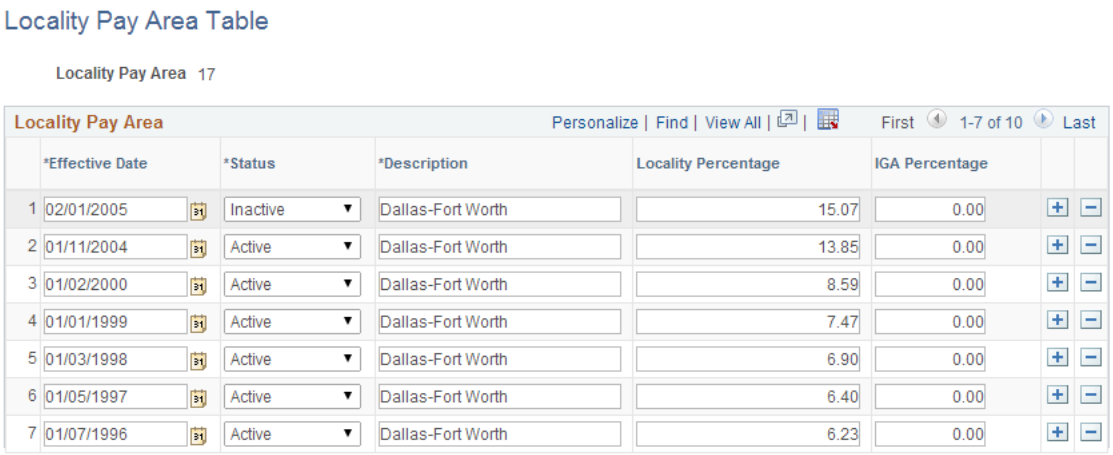
Use the Locality Pay Area Table page (GVT_LOCAREA_TABLE) to define the regions where federal workers receive additional pay above their base pay.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Locality Pay Area Table USF**, and then **Locality Pay Area Table**

This example illustrates the fields and controls on the Locality Pay Area Table page. You can find definitions for the fields and controls later on this page.

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Locality Pay Area Table

Locality Pay Area 17

Locality Pay Area — Personalize | Find | View All | First 1-7 of 10 Last

	*Effective Date	*Status	*Description	Locality Percentage	IGA Percentage
1	02/01/2005	Inactive	Dallas-Fort Worth	15.07	0.00
2	01/11/2004	Active	Dallas-Fort Worth	13.85	0.00
3	01/02/2000	Active	Dallas-Fort Worth	8.59	0.00
4	01/01/1999	Active	Dallas-Fort Worth	7.47	0.00
5	01/03/1998	Active	Dallas-Fort Worth	6.90	0.00
6	01/05/1997	Active	Dallas-Fort Worth	6.40	0.00
7	01/07/1996	Active	Dallas-Fort Worth	6.23	0.00

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Field or Control	Description
Effective Date	The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.
Status	Select a status. **Note:** Add data rows and use the scroll bar, the **Effective Date** field, and the **Status** field to maintain history data for information that changes over time. For example, to retire a **Locality Pay Area,** insert an effective-dated row with a status of *Inactive.*
Locality Percentage	Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the person's Compensation page (JOB_DATA3) in Administer Workforce.

Geographic Locations USF Page

Use the Geographic Locations USF page (GVT_LOCATION) to define geographic locations.

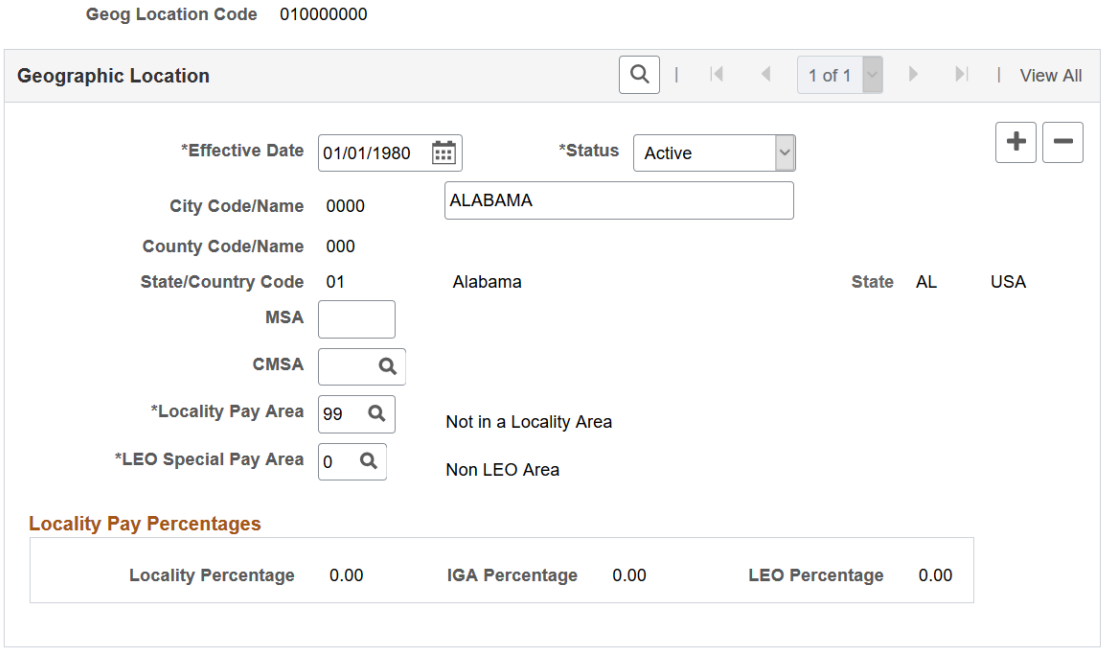
Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Geographic Locations USF**, and then **Geographic Locations USF**

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

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Geographic Locations USF



Field or Control	Description
City Code/Name	The system assigns a city code. Enter the city name.
Locality Pay Area and **LEO Special Pay Area** (law enforcement officer special pay area)	Select from the list.

> **Note**
>
> PeopleSoft Payroll for North America references the Tax Location Table for location information.

Related Topics

- PeopleSoft Payroll for North America

Location USF - Locations Address Page

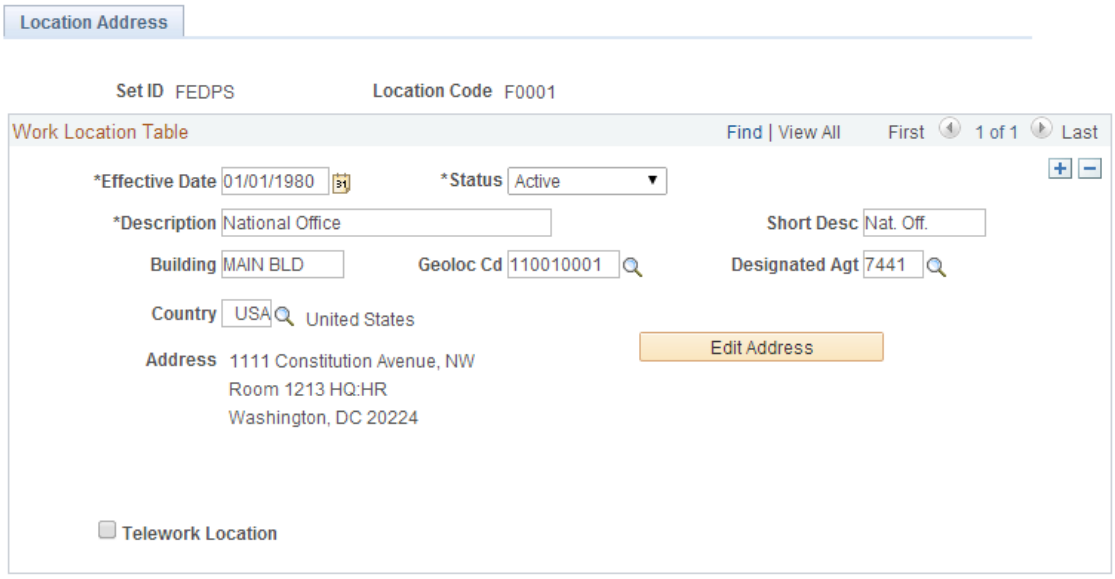
Use the Location USF - Location Address page (GVT_LOC_TABLE1) to add work locations.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Federal Locations**, and then **Location Address**

This example illustrates the fields and controls on the Location USF - Location Address page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Building	Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.
Geoloc Cd (geographic location code)	Select the geographical location code.
Designated Agt (designated agent)	Select the designated agent code.
Country	Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.
Telework Location	Select if this location allows workers to work remotely.

Setting Up Company Locations

To set up company locations, use the Company Location component (COMP_LOC_TBL).

This topic discusses how to establish company locations.

Pages Used to Set Up Company Locations

Page Name	Definition Name	Usage
Company Location Page	COMP_LOC_TBL	Associate Works Council IDs with companies and locations.

Company Location Page

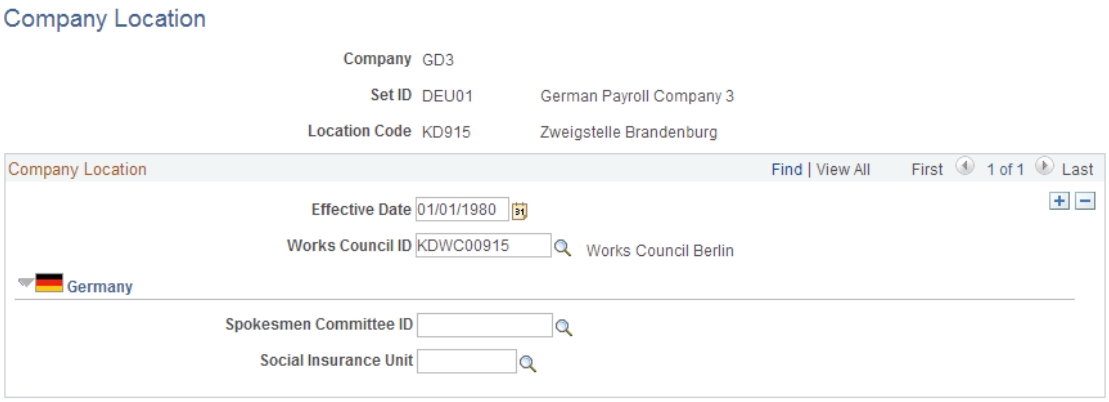
Use the Company Location page (COMP_LOC_TBL) to associate Works Council IDs with companies and locations.

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Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Company Location**, and then **Company Location**

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



Field or Control	Description
Works Council ID	Select the ID of the Works Council representing workers at this company and location.

(DEU) Germany

Field or Control	Description
Spokesmen Committee ID	Select the works council spokesmen committee ID.
Social Insurance Unit	Select a social insurance ID.

Maintaining Departments

To maintain departments, use the Departments component (DEPARTMENT_TBL) and the Department Table Report component (RUN_PER701). Use the DEPARTMENT_TBL component interface to load data into the tables for this component.

These topics provide an overview of departments and discuss how to maintain department information.

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Pages Used to Maintain and Report on Departments

Page Name	Definition Name	Usage
Department Profile Page	DEPARTMENT_TBL_GBL	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG Page (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.
Department Table Report - Run Control Page	PRCSRUNCNTL	Run the Department Table report (PER701) that lists all departments by Department ID.

Understanding Departments

After you define company and location data for your enterprise, use the Departments component to define business entities in your organization. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll, you must set up department codes according to your cost centers where you charge wages. If you use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

PeopleSoft Human Resources offers two ways to access the Departments component to define and view departments:

- From the Set Up HCM menu.
- From PeopleSoft Tree Manager.

This topic discusses how to use the Departments component from within the Set Up HCM menu.

Using Departments for Data Permission Security

PeopleSoft enables you to create a security hierarchy using PeopleSoft Tree Manager and use it to grant or deny users to person data, based on the department a person belongs to. If you decide to use a Department Security tree to control data access, you must attach each department you create, whether from the Set Up HCM menu or Tree Manager, to an effective Department Security Tree.

PeopleSoft HCM also enables you to use other fields for data permission security.

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For more information, see the product documentation for *PeopleTools: Tree Manager*.

Related Topics

- Understanding PeopleSoft Security
  PeopleSoft security is based on permission lists and roles.
- Understanding Data Permission Security for HCM
  Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

Department Profile Page

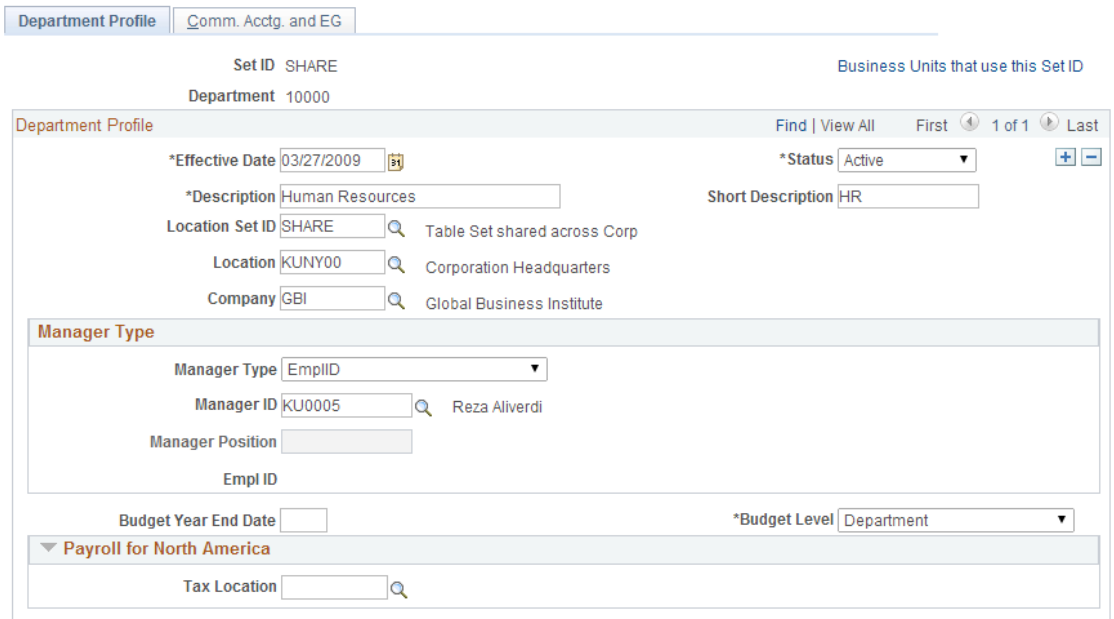
Use the Department Profile page (DEPARTMENT_TBL_GBL) to define basic information about a department.

For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.

Navigation:

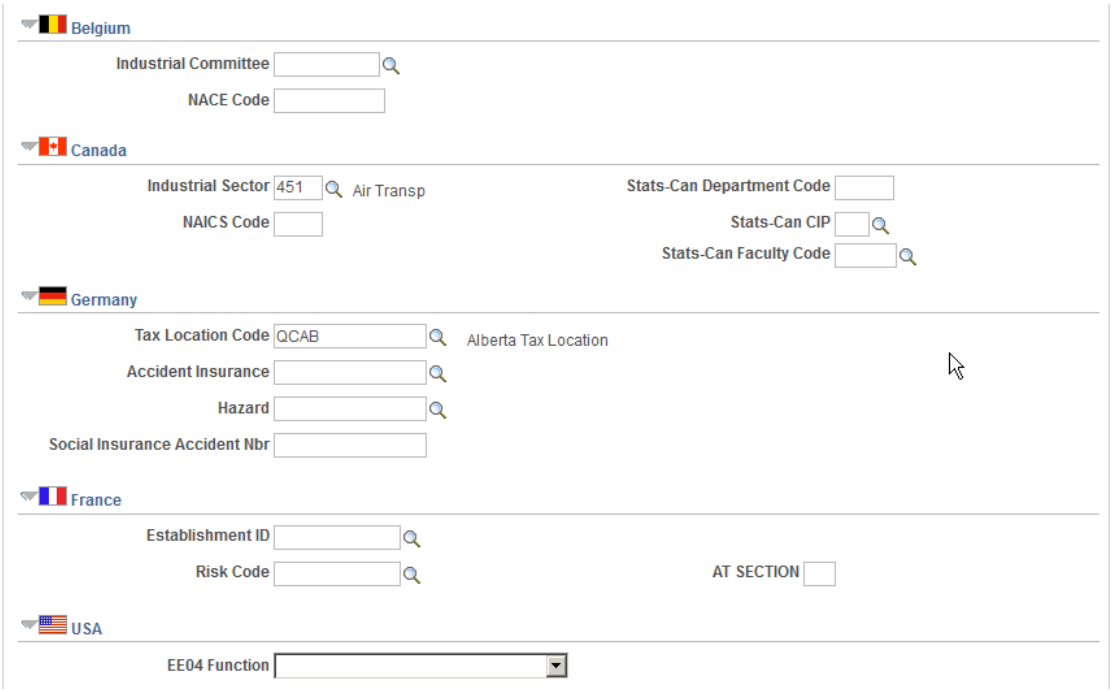
Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Departments**, and then **Department Profile**

This example illustrates the fields and controls on the Department Profile page (1 of 4). You can find definitions for the fields and controls later on this page.

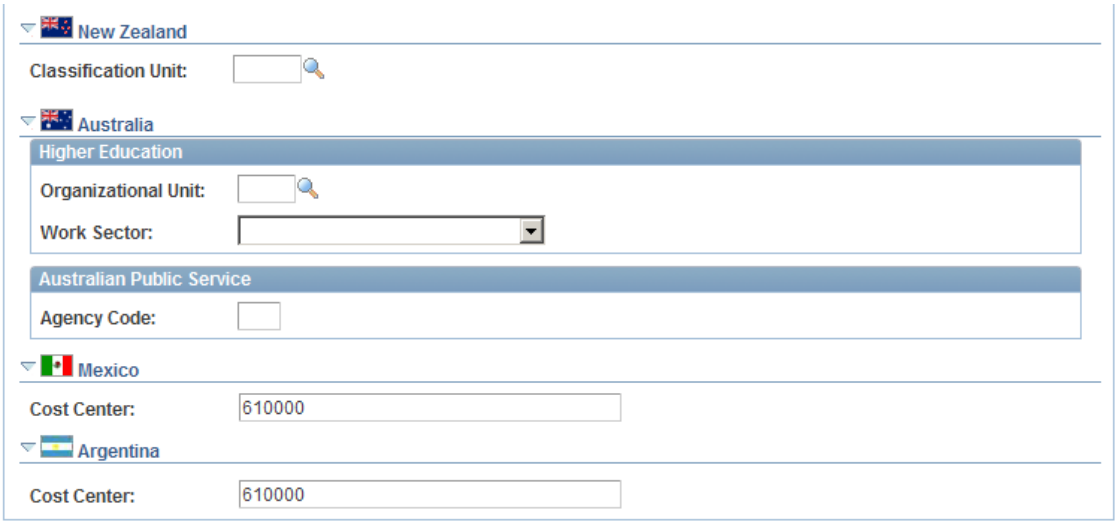


This example illustrates the fields and controls on the Department Profile page (2 of 4). You can find definitions for the fields and controls later on this page.

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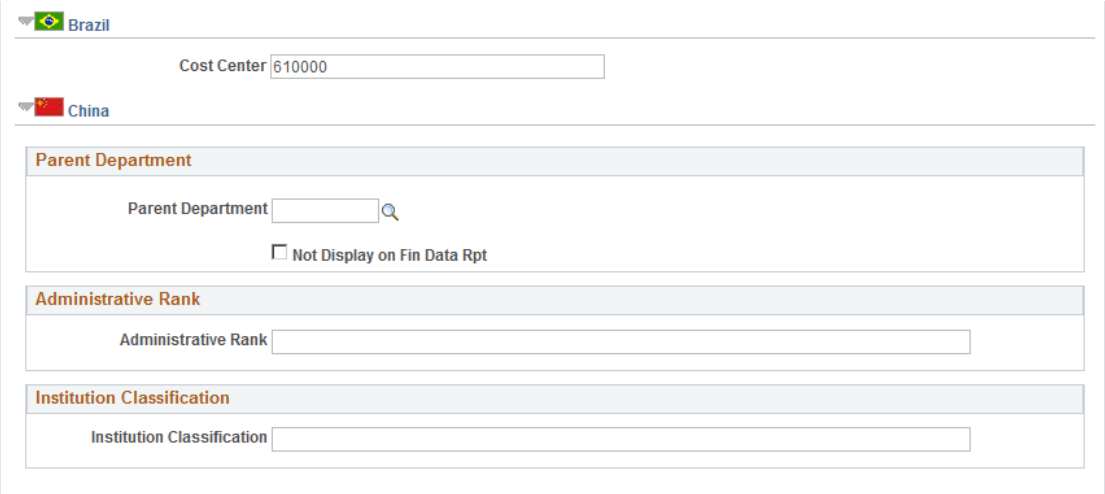


This example illustrates the fields and controls on the Department Profile page (3 of 4). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Department Profile page (4 of 4). You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Effective Date	If you add a new department to the Departments component from the Set Up HCM menu, set its effective date to predate (or be equal to) the effective date of your security tree.
Description	For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.
Location Set ID and **Location**	To associate a department with a physical location, select the location. Maintain these values in the Locations component.
Company	Indicate the company to which this department belongs. The system uses the **Company** field value as the default company location on the job records for all people associated with this department. If you add a person to this department, the system assumes that they are also with the designated company. If you don't enter a company here, you can enter it on the Job Data pages. If you do enter a company here, you can't change it on the Job Data pages. **Note:** If yours is a multicompany environment and you want more than one company to share the department, leave the *Company* field blank.

Manager Type

If you are not specifying managers for departments, select *None.* If you are specifying managers, indicated if the manager is a person *(EmplID)* or a position *(Position).* If you use partial position management, where you use positions for only a portion of your organization, select whichever option is appropriate for this department.

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Field or Control	Description
Manager ID	If you selected *EmplID*, the system makes this field available for you to select the ID of the manager. The manager ID that you select becomes the default supervisor ID on the Job records of all people who are assigned to this department. If you have more layers in your organization, override the default.
Manager Position	If you selected *Position*, and you have created positions for this department, select a **Manager Position** number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. The system displays the name and EmplID of the current position incumbent in the **EmplID** field. **Note:** The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Budget Level	Select *Department, Job Code, Line Item, Position Number*, or *None* to define budgeting for this department.

Payroll for North America

Field or Control	Description
Tax Location	Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution pages (TAX_DISTRIBUTION or TAX_DIST_CAN) of employees of this department. You can override this information for individual employees.

(BEL) Belgium

Field or Control	Description
Industrial Committee	Select the industrial committee for the company. This can be overwritten at the department level if necessary.
NACE Code	Enter the NACE code for the company. **Note:** The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

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(CAN) Canada

Field or Control	Description
Industrial Sector	The North American Industrial Classification System (NAICS) is a common framework for the production of comparable industry statistics for Canada, Mexico and the United States. Its hierarchical structure is composed of sectors (two-digit codes), subsectors (three-digit codes), industry groups (four-digit codes), and industries (five-digit codes). At each level of the hierarchy, additional digits are appended to those from the previous level. For example, the NAICS-2007 sector code for health care is 62, so all of the subsector, industry group, and industry codes for healthcare begin with 62. Use the **Canadian Industrial Sector** field to select the two-digit sector code for the department. Sectors with a large number of industries have multiple sector codes. Although there is no difference between the codes at the sector level, the best practice is to select the code with the correct digits for the department's industry. For example, although you can use 31, 32, or 33 for the Manufacturing sector, if you are a clothing manufacturer with an industry group of 3151, you should select *31* as the sector code. Codes are effective-dated so that you can easily update this field when new codes are published. For example, the NAICS-2007 codes became effective on January 1, 2007 and are available for entry only in rows with effective dates on or after that date.
NAICS Code	Enter the four-digit NAICS code for the department's industry group. The NAICS code is used for Canadian employment equity reporting purposes and appears in the Employment Equity Report (PER101CN). When new NAICS codes are published, create a new effective-dated row to capture any changes to a department's industry group code.
(E&G) Stats-Can-Department Code (Statistics Canada department code)	Enter a department code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only. For reporting periods that start before October 1, 2009, the system uses this code for the department when you load data (see PeopleSoft Human Resources Track Faculty Events: Loading Data Into the Academic Teaching Survey Tables) into the Academic Teaching Survey Tables and when you create the survey result flat file (see .PeopleSoft Human Resources Track Faculty Events: Creating the Survey Report Flat Files).

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Field or Control	Description
(E&G) Stats-Can CIP (Statistics Canada Classification of Instructional Programs)	Enter the code that classifies the department's instructional programs. This field is intended for Canadian higher education degree-granting institutions only. For reporting periods that start on or after October 1, 2009, the system uses this code for the department when you load data (see PeopleSoft Human Resources Track Faculty Events: Loading Data Into the Academic Teaching Survey Tables) into the Academic Teaching Survey Tables and when you create the survey result flat file (see PeopleSoft Human Resources Track Faculty Events: Creating the Survey Report Flat Files).
(E&G) Stats-Can Faculty Code (Statistics Canada faculty code)	Select a code to associate a faculty with a department. Faculty codes are set up on the PeopleSoft Human Resources Track Faculty Events: Faculty Code Stats CAN Page and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See PeopleSoft Human Resources Track Faculty Events: Understanding the University and College Academic Staff System (UCASS) Survey Business Process.

(DEU) Germany

Field or Control	Description
Tax Location Code	Select a code. **Note:** For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

> **Note**
>
> The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

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(FRA) France

Field or Control	Description
Establishment ID	Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund. This field is required for Global Payroll for France. The system will default this value into a worker's Job record when you use PeopleSoft Human Resources: Manage Positions.
Risk Code	Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.
AT SECTION	Select the AT section for the risk code selected in the **Risk Code** field. Risk Code / AT sections are defined for establishments. When there are several AT sections defined for the establishment, use this field to specify the AT section to use.

(USA) USA

Field or Control	Description
EEO4 Function (Equal Employment Opportunity 04 function)	Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand

Field or Control	Description
Classification Unit	Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(AUS) Australia

These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

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Field or Control	Description
Organizational Unit	Enter the appropriate Higher Education organizational unit code.
Agency Code	Enter the four-digit Australian Public Service code for this department.

(MEX, ARG, and BRA) Mexico, Argentina, and Brazil

Field or Control	Description
Cost Center	Identify the cost center for this department.

(CHN) China

Field or Control	Description
Parent Department	Enter the parent department responsible for CNAO reporting for SOE and PSGM.
Not Display on Fin Data Rpt (not display on financial data report	When this check box is selected, the parent company information does not appear on the CNAO XML file. If you want the parent company information to appear, you must deselect this check box.

Comm. Acctg. and EG Page

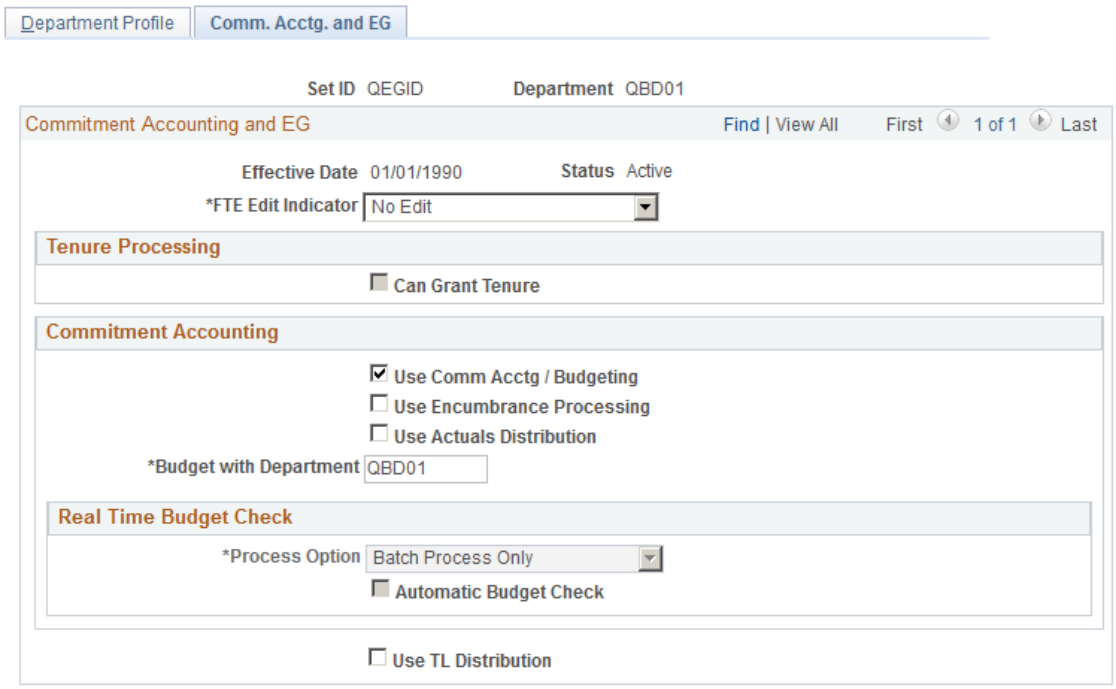
Use the Comm. Acctg. and EG (department table - commitment accounting and education and government) page (DEPARTMENT_TBL_CA) to enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Departments**, and then **Comm. Acctg. and EG**

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

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Field or Control	Description
FTE Edit Indicator (full-time equivalency edit indicator)	Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select *No Edit*.

Tenure Processing

Field or Control	Description
Can Grant Tenure	Select to be able to grant tenure to qualified people in this department.

Commitment Accounting

Field or Control	Description
Use Comm. Acctg / Budgeting (use commitment accounting / budgeting)	Select if you use Commitment Accounting processing for this department. When you select this check box, the other page elements in this group box become available for entry.

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Field or Control	Description
Budget with Department	An accumulated budget for a group of departments rolls up to the department that you enter. The department that you enter must be in the same Set ID as the department that you are defining, and it must be higher on the security tree. For example, if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same Set ID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005. See Setting Up and Assigning Tree-Based Data Permission.
Use Encumbrance Processing	Select if you use Commitment Accounting encumbrance processing for this department.
Use Actuals Distribution	Select if you use Commitment Accounting's Actuals Distribution process for this department.

Real Time Budget Check

Field or Control	Description
Process Option	Choose how to process job data and position data changes that can affect encumbrance calculations. Certain processing options result in different actions depending on whether the job data or position data change is considered critical. Critical changes in the Job Data component include hiring, rehiring, and adding a concurrent job. Critical changes in the Position Data component include creating a position, increasing the head count for a position, changing a position from inactive to active, and changing the Pre-Encumbrance Indicator for a position from *None* or *Requisition* to *Immediate,* The following table describes your processing option choices:

Process Option	Critical Changes	Non-Critical Changes
All	Allows immediate budget checking from the Job Data and Position Data components.	Allows immediate budget checking from the Job Data and Position Data components.
Batch Process Only	Do not allow real-time budget checking. All encumbrance calculations are performed by the batch process. The individual budget check status is set to *Pending.*	Do not allow real-time budget checking. All encumbrance calculations are performed by the batch process. The individual budget check status is set to *Pending.*

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Process Option	Critical Changes	Non-Critical Changes
Critical	Allows immediate budget checking from the Job Data and Position Data components.	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to *Pending*.
Deferred	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to *Pending*.	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to *Pending*.

Field or Control	Description
Automatic Budget Check	This check box is available only if the selected Process Option is *All* or *Critical*. Select this check box if you want the system to immediately perform a real-time budget check when a user attempts to save a change to job data or position data. Deselect this check box if you want the system to present a pop-up window when a user attempts to save a change to job data or position data. The pop-up window gives the user the choice of performing the budget check immediately or saving the transaction without performing the budget check. If the user bypasses the budget check, the system generates a transaction that can be processed from the Budget Check by Job page or the Budget Check by Position page.

Additional Page Element

Field or Control	Description
Use TL Distribution	Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers. If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

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Related Topics

- PeopleSoft Human Resources Track Faculty Events: Setting Up Tenure Tracking
- PeopleSoft Human Resources Manage Commitment Accounting: Understanding Fiscal Year Budgets in PeopleSoft Human Resources

Running an SQR Audit to Cross-Check Departments

When you add new departments to the Departments component, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the Departments component but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Departments component. The latter situation can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator.

(USF) Setting Up Federal Departments

To set up Federal departments, use the Departments USF component (DEPARTMENT_TBL).

These topics discuss how to set up federal departments.

Page Used to Set Up Federal Departments

Page Name	Definition Name	Usage
Department Table Page	GVT_DEPART_TBL_USA	Set up departments.

Department Table Page

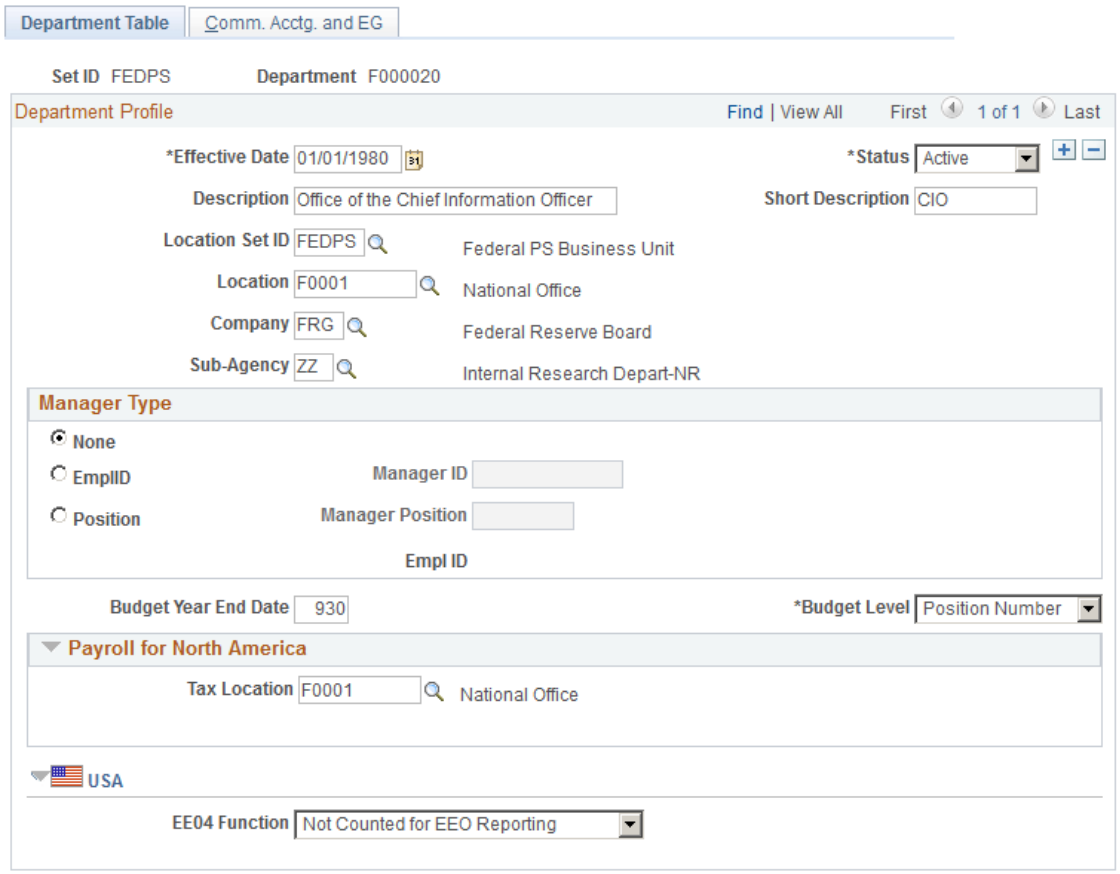
Use the Department Table page (GVT_DEPART_TBL_USA) to set up departments.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Departments USF**, and then **Department Table**

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

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Field or Control	Description
Effective Date	**Note:** If you add a new department to this Departments USF component from the Set Up HCM menu, set its effective date to predate (or be equal to) the effective date of your security tree.
Sub-Agency	Select the sub-agency to which this department belongs. **Note:** The system uses the **Company** and **Sub-Agency** fields as the default agency/sub-agency location on the Job records for all people who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.
Manager ID	The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

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Field or Control	Description
Manager Position	If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position. **Note:** You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS. If you use partial position management, where you use positions for only a portion of your organization, you can use either the **Manager ID** number or the **Manager Position** number. When you select either field, the system disables the remaining field.
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Budget Level	Select *Department, Job Code, Line Item, Position Number*, or *None* to define budgeting for this department.

(USA) USA

Field or Control	Description
EEO4 Function	Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See *PeopleTools: Application Designer Developer's Guide*.

Related Topics

- PeopleSoft Human Resources Manage Positions
- PeopleSoft Payroll for North America

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).

These topics provide an overview of and discusses setting up primary permission list preferences.

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Pages Used to Set Defaults for Permission Lists

Page Name	Definition Name	Usage
Org Defaults by Permission Lst - Defaults Page	OPR_DEF_TBL_HR	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Org Defaults by Permission Lst - Settings Page	OPR_DEF_TBL_HR2	Set Payroll System and system-wide defaults for each of your permission lists.

Understanding Primary Permission List Preferences

You use the Org Defaults by Permission Lst component to set predefined TableSet sharing and system-wide defaults and settings for each of your primary permission lists. Primary permission lists are assigned to the user on the User Profile - General page (USER_GENERAL). The system will default in the values you indicate for a particular permission list on the Org Defaults by Permission Lst component, such as Business Unit, Set ID, Currency, Country, and/or Company Code when a user who is associated with that permission list logs in to PeopleSoft HCM. Primary permission lists also control user access to country functionality, as determined on the Setup Global Security page (SCRTY_TBL_GBL)).

See *PeopleTools: Security Administration*, "Setting Up Permission Lists".

Related Topics

- Setting Up Security for Local Functionality
  These topics provide an overview of security for local functionality and discuss setting up security for local functionality.

Org Defaults by Permission Lst - Defaults Page

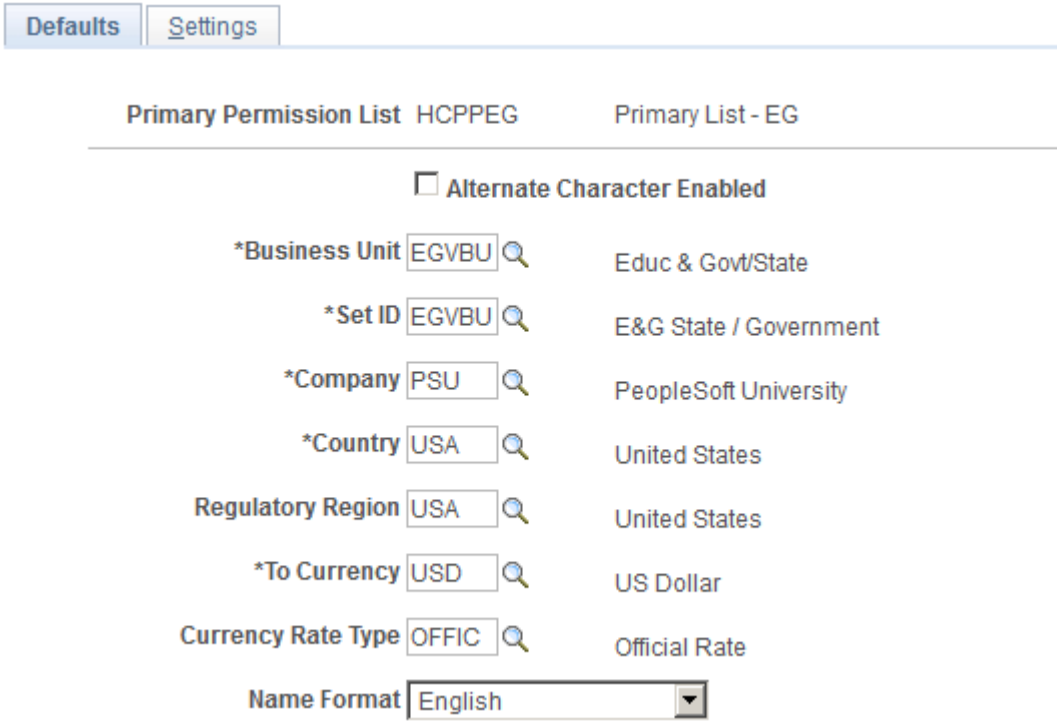
Use the Org Defaults by Permission Lst - Defaults page (OPR_DEF_TBL_HR) to set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Org Defaults by Permission Lst**, and then **Defaults**

This example illustrates the fields and controls on the Org Defaults by Permission Lst - Defaults page. You can find definitions for the fields and controls later on this page.

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You can tailor your PeopleSoft HCM system for each of your users, controlling the default values that users see on pages in the system.

> **Note**
>
> The TableSet Record - Group Control page regulates what users see on the prompt tables in PeopleSoft HCM. These defaults override the defaults that you set for these options on the Installation Table for this permission list.

Field or Control	Description
Alternate Character Enabled	Select to enable alternate character searching for this permission list.

> **Warning**
>
> The Set ID field value that you select affects the business unit and Set ID defaults for this permission list throughout your PeopleSoft HCM system.

Related Topics

- Working with Alternate Character Sets
  These topics provide an overview of alternate character system architecture and discuss how to:

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- Business Units, Tablesets and Set IDs
  PeopleSoft regulates HCM system data through the use of business units, tablesets, and set IDs.
- Administering Country Codes
  To administer country codes, use the Country Table (COUNTRY_TABLE), Country Address Format Table (ADDRESS_TABLE), the Country Table – HR (HR_COUNTRY_TABLE), and the State/Province (STATE_DEFN) components.
- Associating a Regulatory Region with a Transaction
  These topics provide an overview of regulatory regions and transactions and discuss how to:
- Understanding Currency
  If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

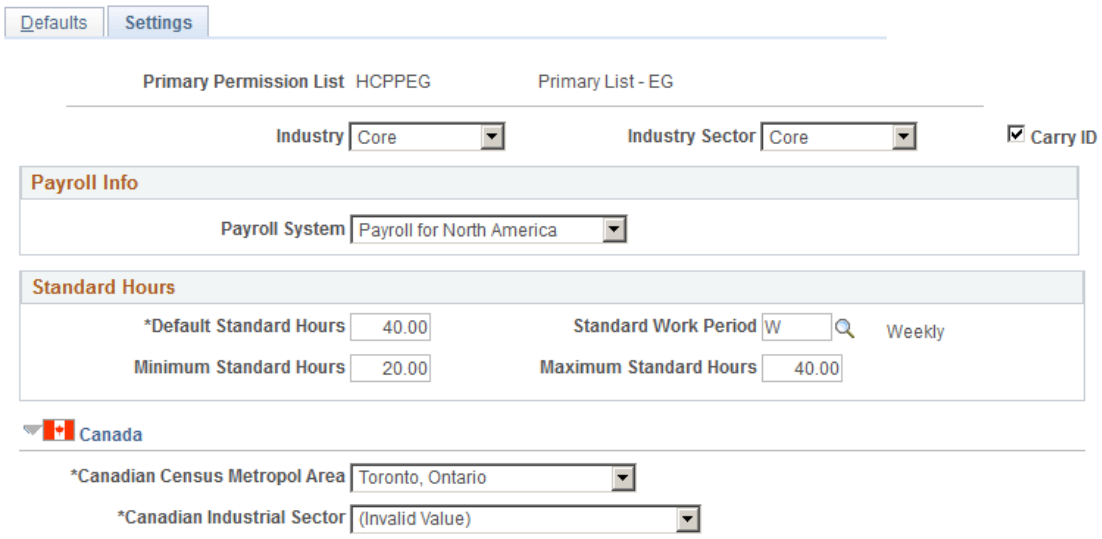
Org Defaults by Permission Lst - Settings Page

Use the Org Defaults by Permission Lst - Settings page (OPR_DEF_TBL_HR2) to set Payroll System and system-wide defaults for each of your permission lists.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Organization**, and then **Org Defaults by Permission Lst**, and then **Settings**

This example illustrates the fields and controls on the Org Defaults by Permission Lst - Settings page. You can find definitions for the fields and controls later on this page.



You can tailor your PeopleSoft HCM system for each permission list, thus controlling the default values that users see on the system pages.

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Field or Control	Description
Industry	Select *Government* if this is a U.S. federal government database. The default value is *Core.*
Industry Sector	Select *US Federal* if this is a U.S. federal government database. The default value is *Core.*

Field or Control	Description
Carry ID	Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

> **Note**
>
> You must select an **Industry** of *Government* and an *Industry Sector* of *US Federal* to fully use U.S. federal government functionality in your database. In addition, you need to select Federal on the Installation Table - Products page (ISTALLATION_TBL1).

Specifying a Default Payroll System

Field or Control	Description
Payroll System	Select the default payroll system. When you select a payroll system on a table or page in PeopleSoft HCM, the system displays *North American, Global,* or neither one based on the choice you enter here for this permission list. The user can override this default, as necessary.

Setting Default Standard Hours

Field or Control	Description
Default Standard Hours	The default is *40* hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.

Field or Control	Description
Standard Work Period	Select a standard work period. The standard work period is the time period in which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).

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Field or Control	Description
Minimum Standard Hours and **Maximum Standard Hours**	Enter the default minimum and maximum standard hours for this Set ID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(CAN) Canada

Field or Control	Description
Canadian Census Metropol Area (Canadian census metropolitan area)	Select from the metropolitan areas defined on the Translate table.
Canadian Industrial Sector	Select from the list of values on the Translate table.

> **Note**
>
> (CAN) These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See PeopleSoft Human Resources Meet Regulatory Requirements: Understanding Regulatory Requirements for Canada.

Related Topics

- Setting Up Implementation Defaults
  To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

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Setting Up Personal Information Foundation Tables

Defining Citizen Status Codes

To define citizen status codes, use the Citizen Status component (CITIZEN_STATUS).

This topic discusses how to define citizenship statuses.

Page Used to Define Citizenship Statuses

Page Name	Definition Name	Usage
Citizen Status Page	CITIZEN_STATUS	Define the citizenship statuses you'll need to track for various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Citizen Status Page

Use the Citizen Status page (CITIZEN_STATUS) to define the citizenship statuses you'll need to track for various countries.

For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Citizen Status**, and then **Citizen Status**

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

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Field or Control	Description
Country	The system displays the country code you entered to access the page. Define citizenship status codes for this country.
Status	Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Defining National ID Types

To define national ID types, use the National ID Type component (NID_TYPE_TABLE).

This topic discusses how to assign a national ID type to a country code.

Page Used to Define National ID Type

Page Name	Definition Name	Usage
National ID Type Page	NID_TYPE_TABLE	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when a person or applicant ID is unavailable.

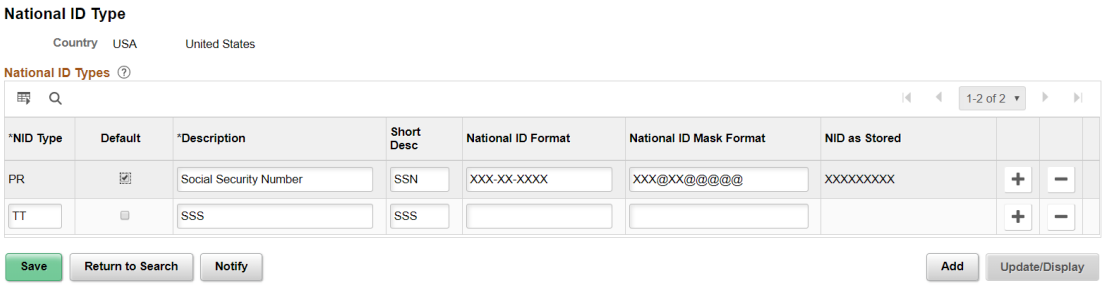
National ID Type Page

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **National ID Type**, and then **National ID Type**

Use the National ID Type page (NID_TYPE_TABLE) to assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when a person or applicant ID is unavailable.

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Field or Control	Description
National ID Mask Format	National ID mask format supports only @ and X. Use X at positions in the National ID that needs masking. The National ID mask format should match the National ID format in length Use @ for showing the input character at that position. For example, for National ID 123-12-1234, if Masking format XXX@XX@@@@@ is used, the masked output will be XXX-XX-1234 Alternatively, to completely display masked value while preserving the format, a single 'X' can be specified in this field. Similarly, a single '@' will display unmasked value. For the same example, completely masked output will be XXX-XX-XXXX. **Note:** : Mask format will be used only if Data Masking is enabled in Installation Options.

All countries track some form of national ID for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance number, UK workers have a National Insurance number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

When you select a country code on any global page where you are entering a national ID, the system refers to the information defined on this page to enter a default national ID type (if selected) or to ensure that you select a valid one. The system also validates the national ID you enter against the format you specify here. If you don't enter the correct number of digits or letters for a country's national ID, the system displays a warning message.

For example, when you enter national ID information for a new American person on the Biographical Details page the system uses the information set up on the National ID Type Table page to determine the valid national ID types for USA and enters PR as the default. It will validate the data you enter to make sure it matches the specific value types you set up for the National ID Type Format and format the data entered, if necessary. In this example, the system will reformat an entry of XXXXXXXXX to XXX–XX–XXXX.

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> **Note**
>
> Application pages containing the **National ID** field perform an additional system check to determine the proper display by referring to the User Defined File (UDF) format. Specify these formats in PeopleSoft Application Designer.

> **Note**
>
> The PeopleSoft application delivers the National ID Type table with the proper types for the supported countries.

> **Note**
>
> (GBR) Use the NID Prefix GBR page to define valid national insurance prefixes. The Inland Revenue requires that employers' year-end reporting contain valid national insurance prefixes only.

See (GBR) Setting Up National Insurance Prefixes for the U.K..

> **Note**
>
> (CAN and USA) The delivered proper national ID type for Canada and the United States is *PR* (which corresponds to the Canadian Social Insurance Number and the American Social Security Number, respectively). You cannot delete this value because it is required for payroll processing.

> **Note**
>
> (DEU and JPN) Users in Germany and Japan aren't required to enter national ID data for workers, so PeopleSoft created a default value of *NO* .

Field or Control	Description
NID Type (national ID type)	Enter the types of national IDs you will use to identify people (for example, employees, dependents, and applicants). If you do not require a national ID type for a country, create a value of *NO* and leave the **National ID Format** field blank. National ID Type is often a required field on other PeopleSoft HCM pages and this gives you a value to enter for individuals from this particular country.

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Field or Control	Description
Default	Select to have the system use this **NID Type** as the default national ID type for individuals from this country. You do not have to designate a default national ID type for a country but without a designated default users will need to specify a type every time they enter a national ID in the system.
National ID Format	Indicate the default format for the national ID. Use the following values: • *X* or *Z* when the user can enter an alphanumeric or blank value. • *A* and any lower case letter when the user must enter a letter. • *9* when the user must enter a numeric value. • If you leave this field blank, users can enter any value (or no value at all) for this national ID type. **Note:** In addition to the general formatting you set up here, PeopleCode record logic performs special data validation on BEL, BRA, CAN, CHE, FRA, GBR, MEX, NLD, USA, DEU, ESP, MYS, and ITA national IDs. **Note:** (USA) When reporting to U. S. federal government agencies, PeopleSoft Payroll for North America converts the default for missing or unknown Social Security numbers to the format required by the agency.
NID as Stored (national ID as stored)	Shows how the NID is stored in the system. Match this value to the field display formats in the Application Designer.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Biographical Details Page

Setting Up Additional Name Information

To set up additional name information, use the No Name Translation (NAME_NOXLAT_TBL), Name Format Types (NAME_FORMAT_TBL), Name Type (NAME_TYPE_TBL), Name Prefix (NAME_PREFIX_TABLE), Name Suffix (NAME_SUFFIX_TABLE), Royal Name Prefix (NM_ROYAL_PREF), Name Royal Suffix (NM_ROYAL_SUFF), and Name Title (TITLE) components.

This video provides an overview of the preferred name feature:

Video: Image Highlights, PeopleSoft HCM Update Image 49: Preferred Name

These topics provide an overview of and discuss setting up additional name information.

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Pages Used to Set Up Additional Name Information

Page Name	Definition Name	Usage
No Name Translation Page	NAME_NOXLAT_TBL	Indicate which language's name fields should not be translated.
Name Format Type Page	NAME_FORMAT_TBL	Define the application class and name group settings to use on Name pages throughout HCM.
Select Name Fields Page	NAME_FORMAT_FML	Select fields to use for all the name display types. If using name groups, identify which fields should display for the formal and display name sections.
Format Name Fields Page	NAME_FORMAT_DSP	Define how to build the employee's formal and display name (NAME_FORMAL and NAME_DISPLAY fields), which is used throughout HCM.
PSFormat Names Page	NAME_FORMAT_PSF	Define how to build the employee's formal and display name for the PeopleSoft Name (NAME and NAME_FORMAL_PSF fields).
Name Type Page	NAME_TYPE_TBL	Define name types.
Name Prefix Page	NAME_PREFIX_TABLE	Enter name prefixes that you'll use when you record name information.
Name Suffix Page	NAME_SUFFIX_TABLE	Enter name suffixes to use to record name information.
Royal Name Prefix Page	NM_ROYAL_PREFIX	Enter royal prefixes and descriptions. Royal Name Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Royal Name Suffix Page	NM_ROYAL_SUFFIX	Define royal suffixes. The Royal Name Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names in the Personal Data pages, you can reference these standard Royal Name Suffixes.

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Page Name	Definition Name	Usage
Name Title Page	TITLE_TBL	Enter titles for use with names. Track standard titles—from *professor* to *mijnheer* —for names in your human resources system.

Understanding Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names as part of your records.

> **Important**
>
> To have the system update names throughout the system, you should always run the Refresh Name Display process whenever you make a change to the No Name Translation and Name Format Types components. You can run this process from the Refresh Name Display Values Page.

Translating Name Fields

When your organization uses multiple languages, the system enables you to determine, which, if any, name fields should be translated into one of the other languages using the No Name Translation table. For example, you may want to translate a Japanese name stored as kanji characters into English so a non kanji user can read the name. However, you may choose to not translate a Spanish name into English.

Formatting Name Fields

PeopleSoft HCM grants you the flexibility to define employee name formats using the Name Format Types component and stores the following information in the Name Format tables (NAME_FORMAT_TBL and NAME_FORMAT_DTL) using these pages:

- Format Name Fields Page (NAME_FORMAL and NAME_DISPLAY fields)
  - Formal name: This is the legal name used for government type forms, government reporting, and legal tender.
  - Display name: This is the employee's preferred, chosen, or lived name that is primarily used for display purposes throughout the system.
- PSFormat Names Page (NAME and NAME_FORMAL_PSF fields)

  The PeopleSoft Format Name typically uses *Last Name,First Name* formatting, often used to alphabetize by last name.
  - PSFormat Formal name
  - PSFormat Display name

The PeopleSoft application delivers 14 global name formats (such as English, German, Chinese, and so on) but you can add or update the name formats to suit your organization's needs. Use the Name Format Types component (NAME_FORMAT_TBL) to identify which name fields your organization wants to use. Then, for the formal and display names (NAME_FORMAL and NAME_DISPLAY fields) and the PSFormat formal and display names (NAME_FORMAL_PSF and NAME fields), specify the order in which they should appear,

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whether or not they are required, and any field labels, spaces, and separators for each name format type.

Video: Image Highlights, PeopleSoft HCM Update Image 19: Configurable Global Name Formatting

Copying to Primary Name Types

PeopleSoft HCM provides the NAME_FLD_CPY application engine program to convert data from source name fields (such as Preferred and Legal Name types) to the name fields of the Primary Name type. This process not only copies fields from one name format type to another but provides the ability to default Preferred Name fields if blank.

See Copy to Primary Name Type Page.

Name Prefixes, Suffixes, and Titles

With the Name Prefix, Name Suffix, Royal Name Prefix, Royal Name Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.,* and suffixes like *Jr.* and *Sr.*

If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor, doctor,* or *count.* These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

No Name Translation Page

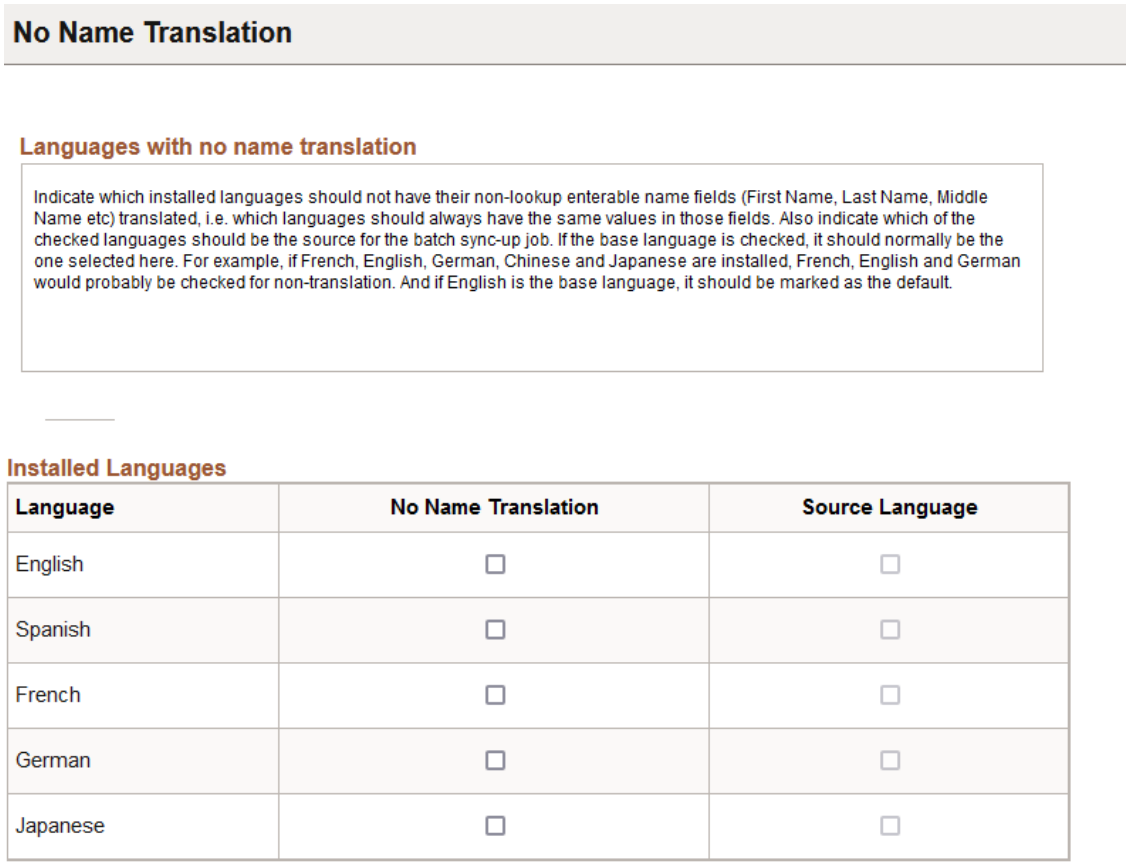
Use the No Name Translation page (NAME_NOXLAT_TBL) to indicate which language's name fields should not be translated.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **No Name Translation**, and then **No Name Translation**

This example illustrates the fields and controls on the No Name Translation page. You can find definitions for the fields and controls later on this page.

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This page is important when it comes to the translation of the editable non-lookup name-related fields (e.g.-First Name, Last Name, or Middle Name). It does not impact the formatted name-related fields that use prompt lookup values (e.g.-Name Prefix or Name Suffix). Translation for these items are defined using the Name Format Types component (see the Name Format Type Page).

Field or Control	Description
Language	Displays the installed languages. The available languages are enabled on the Manage Installed Languages page (**PeopleTools**, and then **Utilities**, and then **International**, and then **Languages**, and then **Manage Installed Languages**). If there is only one language installed, the page is display only and informational text area at the top of the page will indicate that there is no need for translation setup.
No Name Translation	Select which languages the system should *not* translate for the name-related editable fields. If there are multiple languages and you want to use the No Name Translation functionality, at least two languages must be selected and one of the selected languages must be set as the default source language for the batch sync-up job.

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Field or Control	Description
Source Language	Indicate one source language, or the base translation language, the system should use and serve as the language source for the batch sync-up job. The source language is used in the batch job that resets the name fields in the languages that are not to be translated to the values in the source language. For example, say you have set English and Spanish for no translation, and English as the source language. Before the batch job, a person may have a first name of Mary in English and Maria in Spanish. After the batch job runs, both will be set to Mary.

When online changes made to the editable non-lookup name fields in one of the selected languages are saved, background code ensures that those changes are copied to all of the other selected languages. The Refresh Name Display application engine program can be run periodically to ensure that the editable non-lookup name fields are in sync for all of the selected languages, and it copies the values in the Source Language to all of the other selected languages and rebuilds the formatted name display fields.

Important

The Refresh Name Display process (**Set Up HCM**, and then **System Administration**, and then **Database Processes**, and then **Refresh Name Display Values**) should always be run whenever a change is made in this component. For information on this process, see the Refresh Name Display Values Page.

Note

The formatted name fields (Display Name, Formal Name, and PSFormat Name) are not affected by the selections, and will always be translated if the name format includes a translatable lookup field (Name Prefix, Name Suffix or Name Title).

Related Topics

- Format Name Fields Page
  Use the Format Name Fields page (NAME_FORMAT_DSP) to define how to build the employee's Formal Name (NAME_FORMAL) and Display Name (NAME_DISPLAY) field, which are used on pages throughout HCM.
- PSFormat Names Page
  Use the PSFormat Names page (NAME_FORMAT_PSF) to define how to build the employee's formal and display name for the PeopleSoft Name (NAME and NAME_FORMAL_PSF fields).

Name Format Type Page

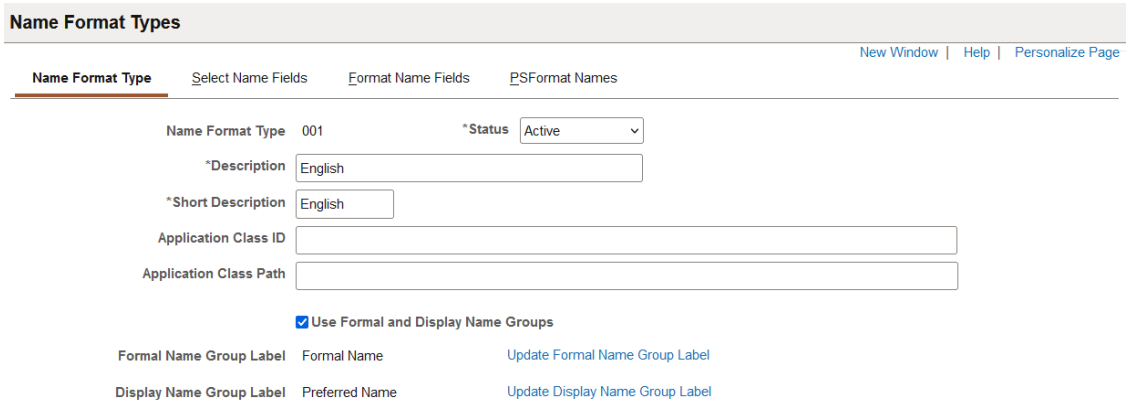
Use the Name Format Type page (NAME_FORMAT_TBL) to define the application class and name group settings to use on Name pages throughout HCM.

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Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Format Types Name Format Type**

This example illustrates the fields and controls on the Name Format Type page.



Field or Control	Description
Application Class ID and **Application Class Path**	Enter the application class ID and page of the application package, which store the path of the extension code. Basic name formatting and all name validation are in the PeopleCode application class **HCR_NAME:NameFormat**. When the basic formatting or validation is not enough for a particular name format, you can extended the class. (CHN, DEU, JPN, and NLD) PeopleSoft HCM delivers extensions that are done for the *Chinese*, *German*, *Japanese*, *Mexican* and *Netherlands* name formats.

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Field or Control	Description
Use Formal and Display Name Groups	Select to organize a person's name fields by Formal Name and Display Name (or Preferred Name) group sections. When enabled, the following occurs: • This page (Name Format Type) displays the **Formal Name Group Label** and **Display Name Group Label** fields and links, where you can define the group name labels using the Maintain Text Catalog. • The Select Name Fields Page in this component presents a **Formal Name** section and a **Display Name** section where you can specify fields specific for those name groups. **Note:**When this group option is deselected, the page will only display one **Name Fields** grid section. • Name pages throughout HCM will display two group boxes: one to enter or view formal name details and one to enter or view display name details. For example, while a person's formal name may be Dr. William Hunter III, his display name might show that he prefers to be addressed as Bill Hunter. Deselect this check box to have all the configured name fields appear within one section. Even if you do not use groups, Name pages will display a field for formal and display name.

These fields become available when you select the **Use Formal and Display Name Groups** check box.

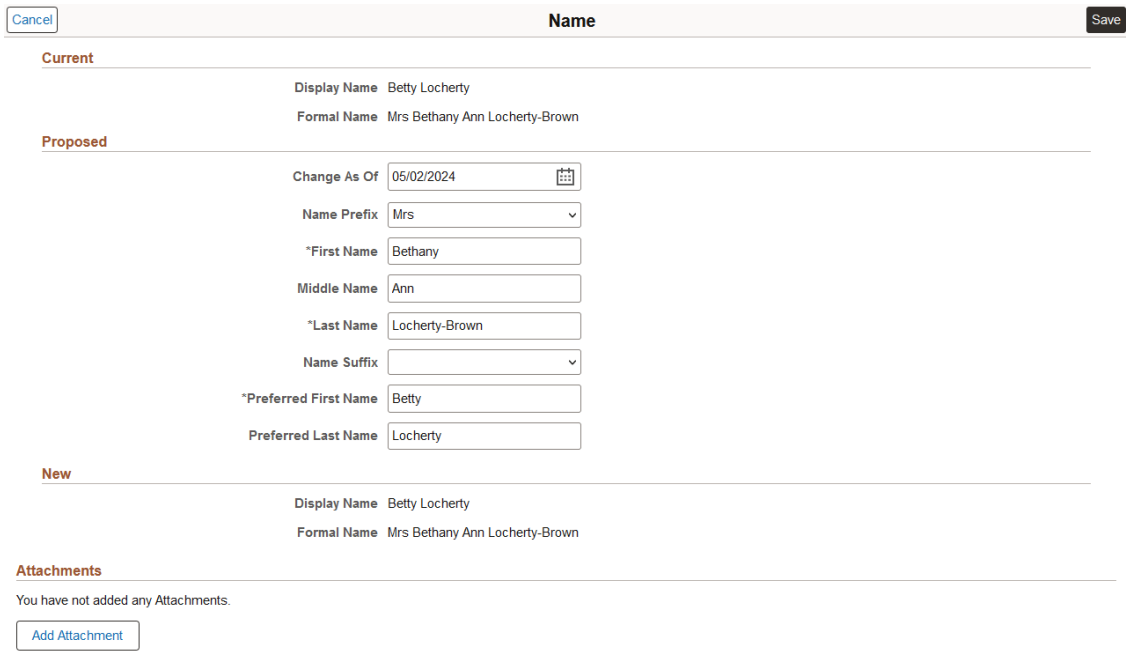
Field or Control	Description
Formal Name Group Label and **Update Formal Name Group Label** link	Displays the label that will appear for a Formal Name group box. Select the link to access the Maintain Text Catalog Page and view or update the formal name group label.
Display Name Group Label and **Update Display Name Group Label** link	Displays the label that will appear for a Display Name group box. Select the link to access the Maintain Text Catalog Page and view or update the display name group label.

Understanding Formal and Display Name Groups

Name pages throughout HCM show a person's **Display Name** and **Formal Name** fields in Current, Proposed, and New subsections.

This example illustrates a typical HR name page without name groups.

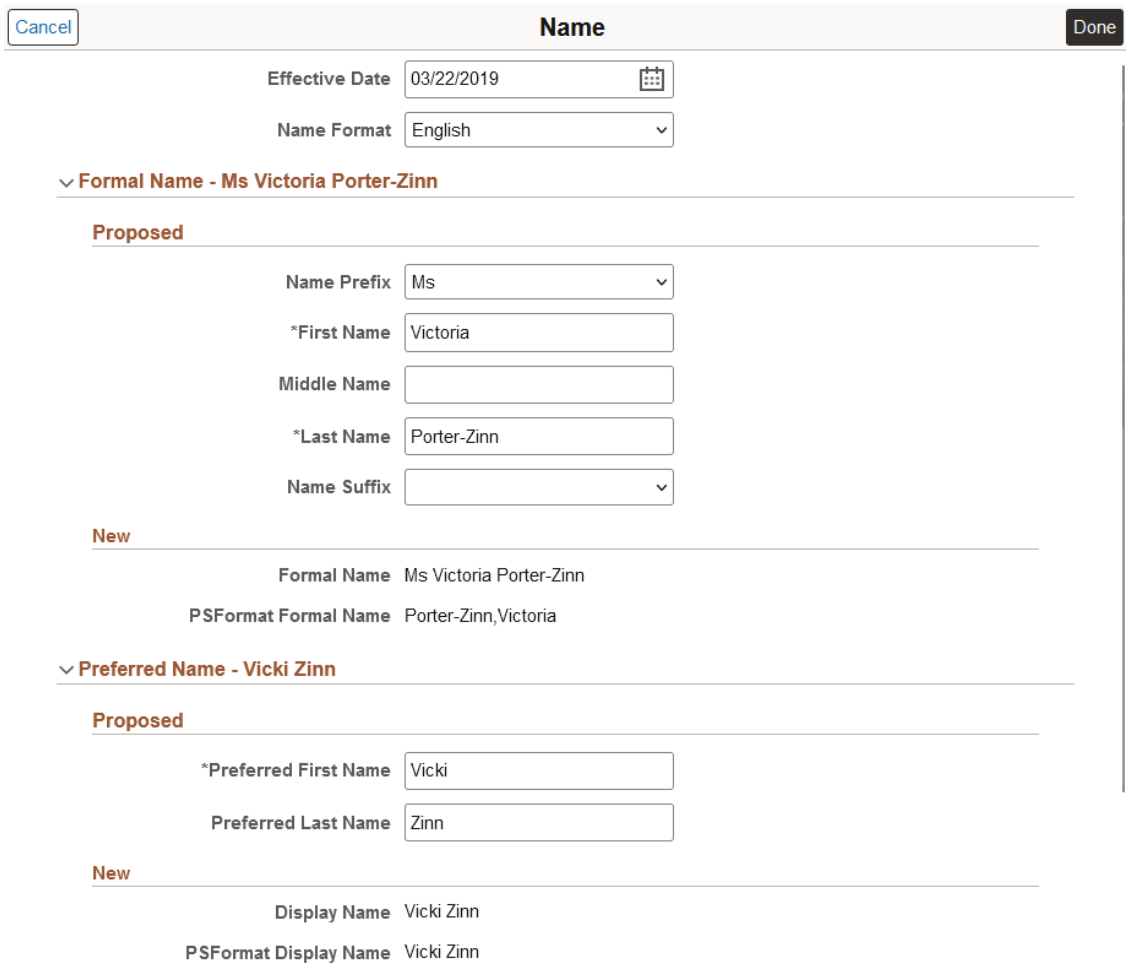
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However, when you enable **Use Formal and Display Name Groups** for a name format type, such as *English*, Name pages using the *English* name format type will display the **Formal Name** and **Display Name** collapsible sections with their configured fields (note that group section labels may vary based on configuration). Each section will show how the name will appear for display and formal purposes.

This example illustrates a name page using name groups.

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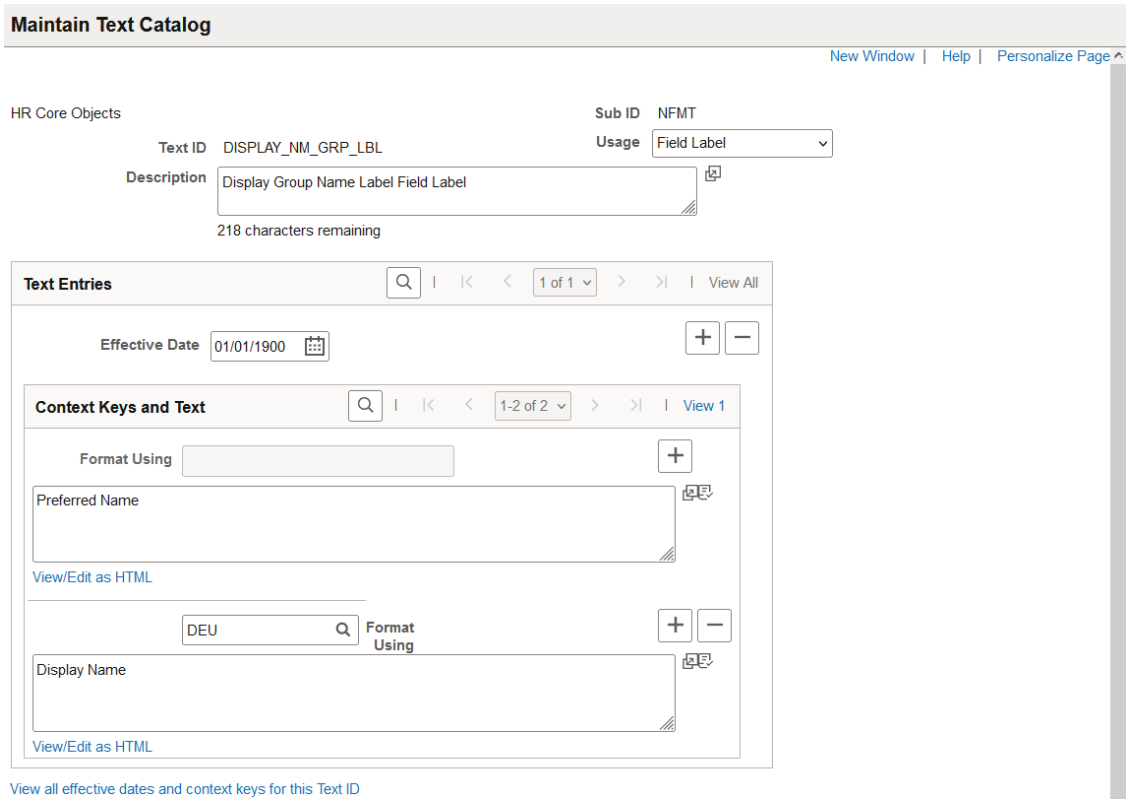
Managing Field Labels Using the Maintain Text Catalog

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to manage labels.

To change the label for one name format type only, add a row in the **Context Keys and Text** area on the Maintain Text Catalog page and indicate the format and text for that format.

In the following example, the DISPLAY_NM_GRP_LBL (Display Group Name Label) will show the label **Preferred Name** for name formats using formal and display name groups except for the German (DEU) name format, where the group label will appear as **Display Name**.

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Select Name Fields Page

Use the Select Name Fields page (NAME_FORMAT_FML) to select fields to use for all the name display types. Use this page to identify which fields are available for setting up all format types, the default order they should appear for configuration, field labels, and whether or not a field is required.

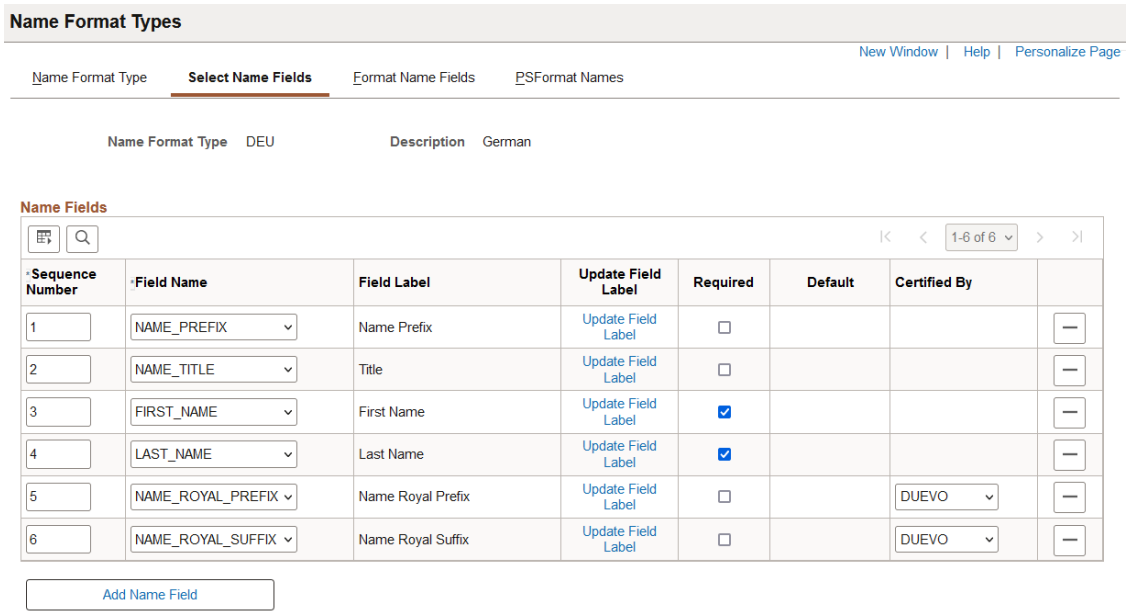
If using name groups, identify which fields should display for the formal and display name sections.

Navigation:

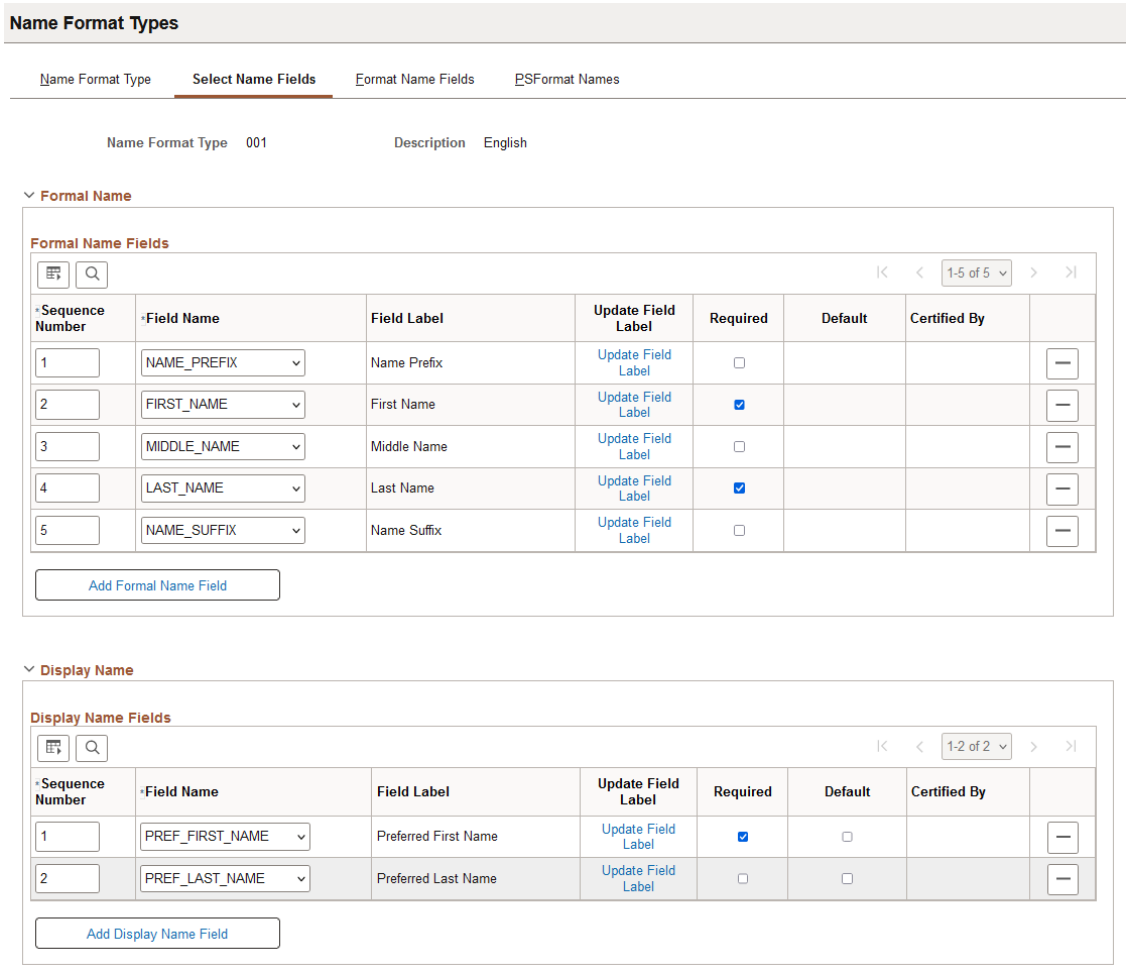
Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Format Types**, and then **Select Name Fields**

This example illustrates the fields and controls on the Select Name Fields page when formal and display names are not selected.

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This example illustrates the fields and controls on the Select Name Fields page when **Use Formal and Display Name Groups** is selected.



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The group boxes for this page will vary based on the whether the **Use Formal and Display Name Groups** option is selected or deselected on the Name Format Type Page.

- *Deselected*: The page displays the **Name Fields** group box where you will identify name fields for all display types.
- *Selected*: The page displays the following collapsible group boxes where you will enter fields specific to display types.
  - **Formal Name**
  - **Display Name**

> **Note**
>
> Since the Display Name (preferred or chosen name) is used for display purposes throughout the system, make sure you configure all the name fields that should appear for the employees.

These fields are common to all group boxes.

Field or Control	Description
Sequence Number	Enter a numeric value to indicate the default order in which you want the name fields to appear on the following pages in this component. By default, the system sets the first row to one and incrementally increases the value by one for each additional row that you insert.
Field Name and **Field Label**	Select the name fields that are available for Formal, Display, and PSFormat Formal and Display Name configuration for this format type. The field label is stored in the Text Catalog.
Update Field Label link	Select this link to access the Maintain Text Catalog Page and view or update the label for this field. To change the label for one name format only, add a row in the **Context Keys and Text** area on the Maintain Text Catalog page and indicate the format and text for that format.

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Field or Control	Description
Required	Indicate whether this field is required for this name format. At least one field per section must be selected as required. Note, however, that If you only require one name for the Display Name group section, and a user enters just one name, that name is all that will show in the headers throughout the system for that person. Oracle recommends that you require both the first and last name when configuring the Display Name group section. **Note:** When this check box is selected for a preferred name field and a user saves a Name page and leaves the required preferred name field blank, the corresponding name field will populate the required preferred name field, even if the **Default** check box is not selected for this field.
Default	This check box is available only for the preferred name fields (e.g.-Preferred First Name, Preferred Last Name, Preferred Middle Name, or Preferred Second Last Name). Select to have the system populate the preferred name field from the corresponding main name field. Values provided by default can be overwritten by the user. **Note:** When a user saves a name page, if the preferred name is left empty, and the field has been marked as required, it will be populated by default from the corresponding name field, even if the **Default** check box is not selected. **Important:** You need to ensure users populate the preferred names since many fluid headers and MouseOver pages use the employee's preferred names.
Certified By	(DEU, NLD) Indicate the certifying authority for the Royal Name Prefix and Suffix fields. Valid values are defined on the Royal Name Prefix Page and Royal Name Suffix Page.
 (Delete Row icon button)	Select this button to remove a name field from this format type.
Add Name Field or **Add Formal Name Fields** and **Add Display Name Field** buttons	Select to add additional name fields to this format type and section. **Note:** When Name Groups are enabled, the **Formal Name** and **Display Name** sections cannot contain the same name fields. You must select at least one name field per section. Keep in mind that if you only select one name for the Display Name group section, the single name will show in the headers. Oracle recommends that you require both the first and last name for the Display Name group section.

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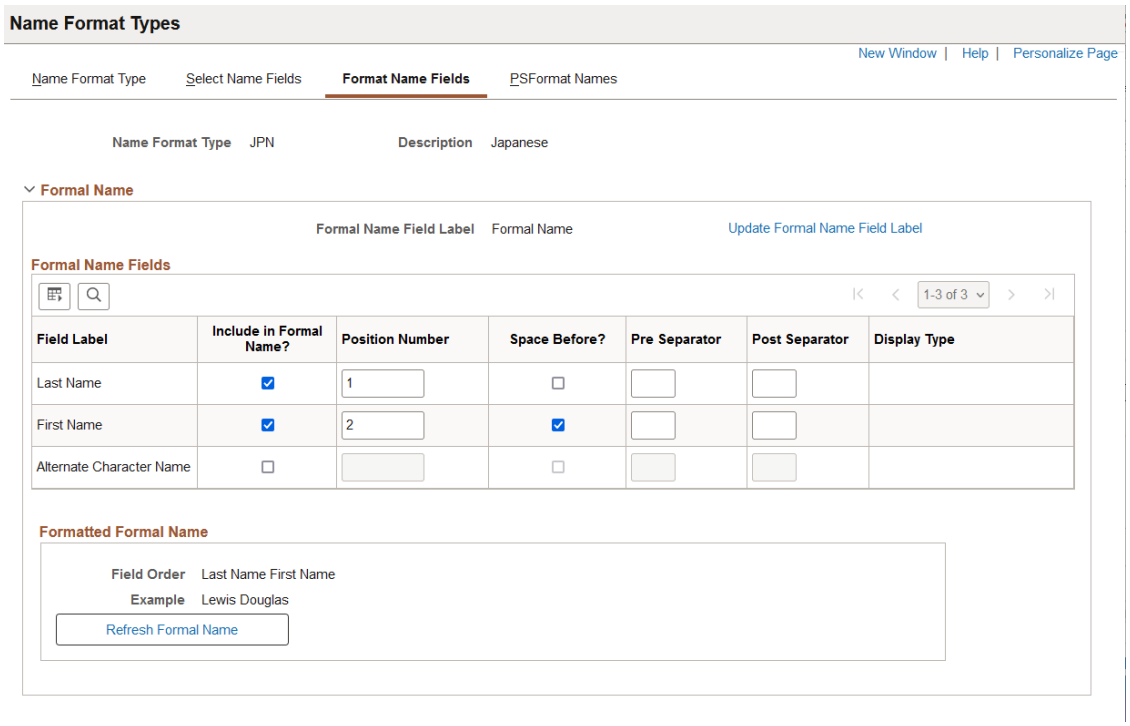
Format Name Fields Page

Use the Format Name Fields page (NAME_FORMAT_DSP) to define how to build the employee's Formal Name (NAME_FORMAL) and Display Name (NAME_DISPLAY) field, which are used on pages throughout HCM.

Navigation:

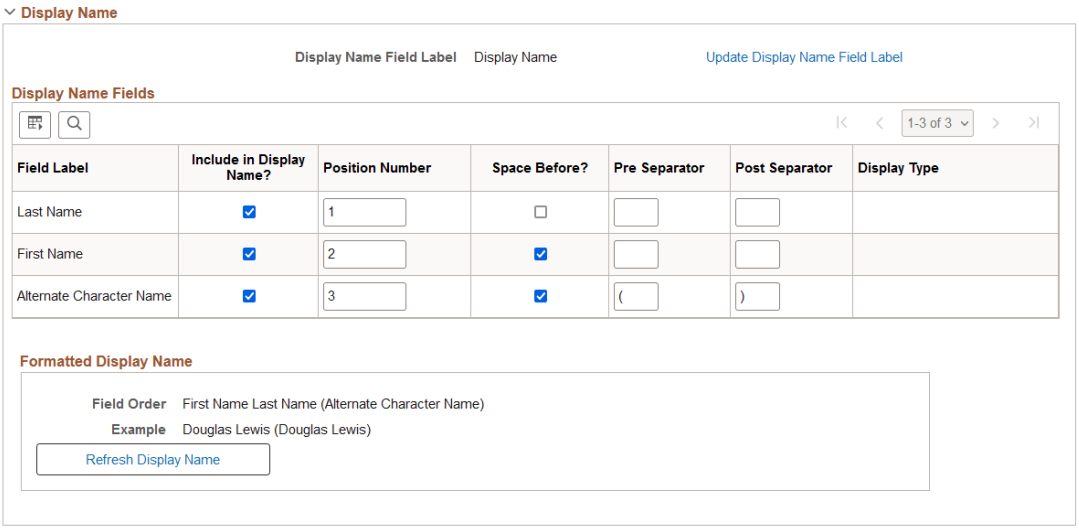
Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Format Types**, and then **Format Name Fields**

This example illustrates the fields and controls on the Format Name Fields page (1 of 2).

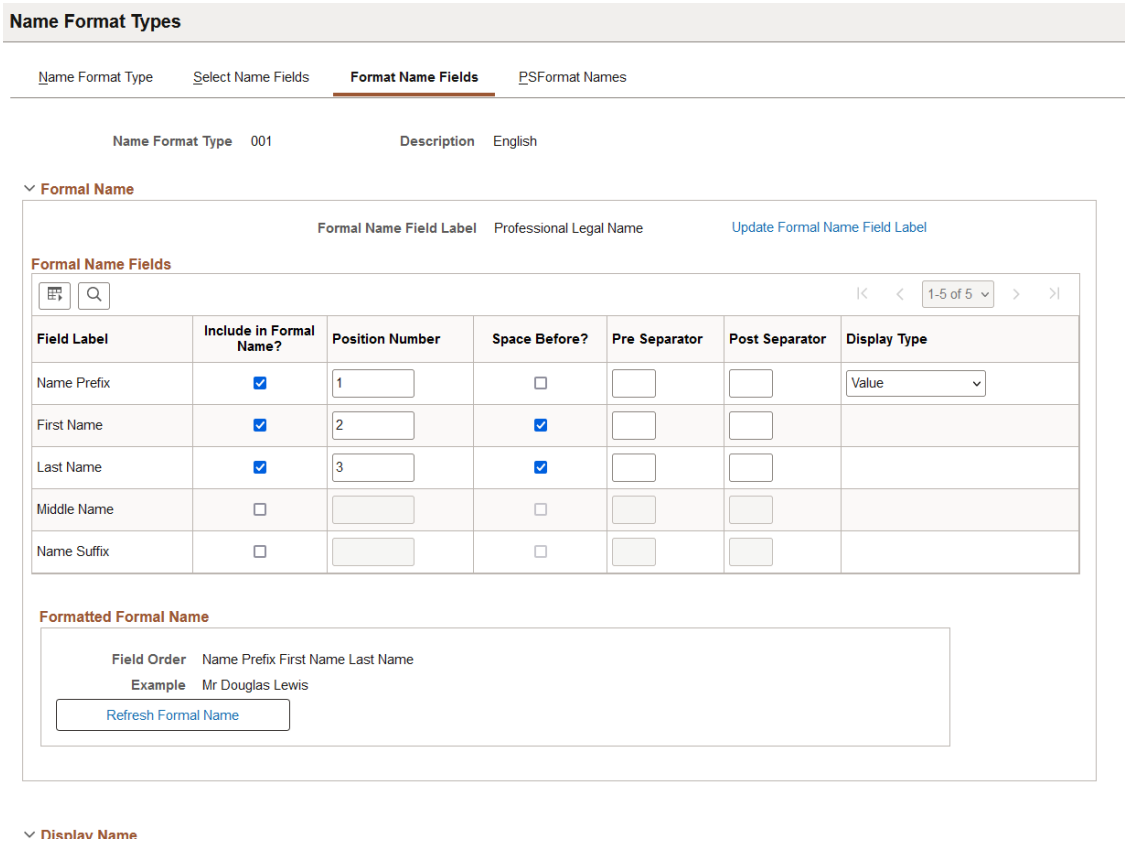


This example illustrates the fields and controls on the Format Name Fields page (2 of 2).

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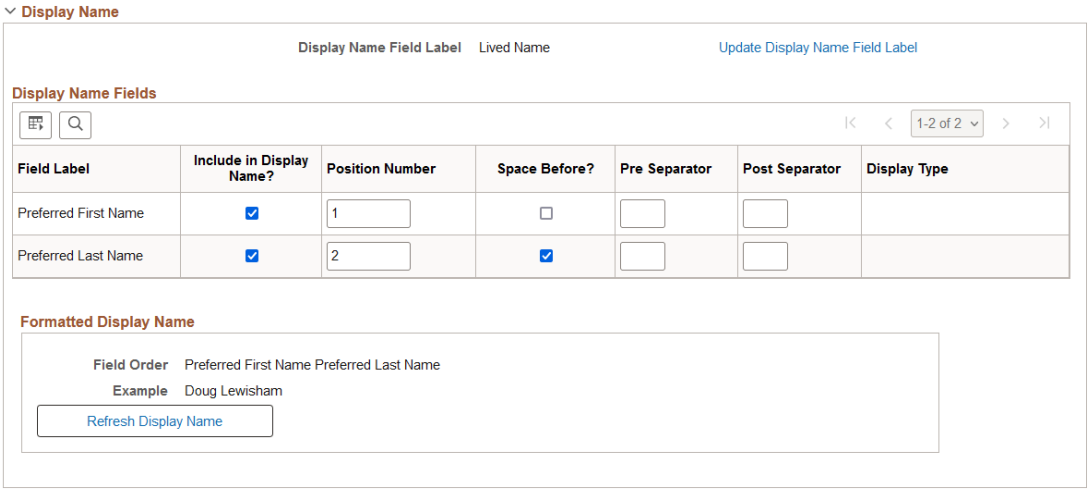


This example illustrates the fields and controls on the Format Name Fields page when Use Formal and Display Name Groups is enabled (1 of 2).



This example illustrates the fields and controls on the Format Name Fields page when Use Formal and Display Name Groups is enabled (2 of 2).

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The fields that appear in the **Formal Name** and **Display Name** group boxes are determined on the Select Name Fields Page.

> **Note**
>
> The page will always display the **Formal Name** and **Display Name** sections and fields, even if you do not have **Use Formal and Display Name Groups** selected on the Name Format Type Page. When the name group options is not enabled, both sections will show the same name fields. When selected, each section will show only those name fields that have been configured for that section.

> **Important**
>
> The Refresh Name Display process (**Set Up HCM**, and then **System Administration**, and then **Database Processes**, and then **Refresh Name Display Values**) should always be run whenever a change is made in this component. For information on this process, see the Refresh Name Display Values Page.

Field or Control	Description
Update Formal Name Field Label and **Update Display Name Field Label**	Select the link to access the Maintain Text Catalog page and view or update the formal name field and display name field header label. The formal name field and display name field labels are typically used as column headers on name summary pages and name grids, such as the name column header labels on the PeopleSoft eProfile: Name (Summary) Page or the column header labels in the Name grid on the PeopleSoft Human Resources Administer Workforce: Person Data Page - Person Details Section.

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Field or Control	Description
Include in Formal Name? and **Include in Display Name?**	Select this check box to ensure that this field value displays when showing either the employee's Formal name (NAME_FORMAL) or Display name (NAME_DISPLAY). When you select this option, other fields on this row will become available. The order in which you select this check box will also set the Position Number value, which you can overwrite. **Important:** Since the Display Name is used throughout the system to show the employee's name, make sure you include all the name fields that should appear for the employees, such as first and last name.
Position Number	Enter a numeric value to indicate the order in which you want the formal and display name fields to appear on the Name pages. By default, the system sets the first included field to one and incrementally increases the value by one for each additional field that is selected as included for the name display. The fields in each section will reorder based on the position number.
Space Before?	Select this check box to indicate that there should be a space before this name field. For example, if a name field displays after another field, you may want to ensure that there is a space between the field values by selecting this option.
Pre Separator or **Post Separator**	Enter a character that should display before or after this field value. For example, if you are showing the name for a person in Japan, you can choose to enclose the alternate character name for the person in parenthesis.
Display Type	For the **Name Suffix, Name Prefix, Title, Name Royal Suffix,** and **Name Royal Prefix** fields, the system enables you to select how to show the field value. Options include: • *Long Description* • *Short Description* • *Value* By default, *Value* is selected. This means that the actual code is used and will not be translated when it is included in the name, (e.g., *Mrs Jane Smith* will be displayed in English and also in French). If the *Short Description* or *Long Description* is selected, the translated value will be used. For example, a display name showing *Mister John Smith* in English would read *Monsieur John Smith* in French.
Refresh Formal Name and **Refresh Display Name**	Select these buttons to have the **Field Order** and **Example** field show how the name will display with the current settings.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Name Page

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- PeopleSoft Human Resources Administer Workforce: Biographical Details Page
- PeopleSoft eProfile: Name (Summary) Page
- PeopleSoft eProfile: Name (Detail) Page

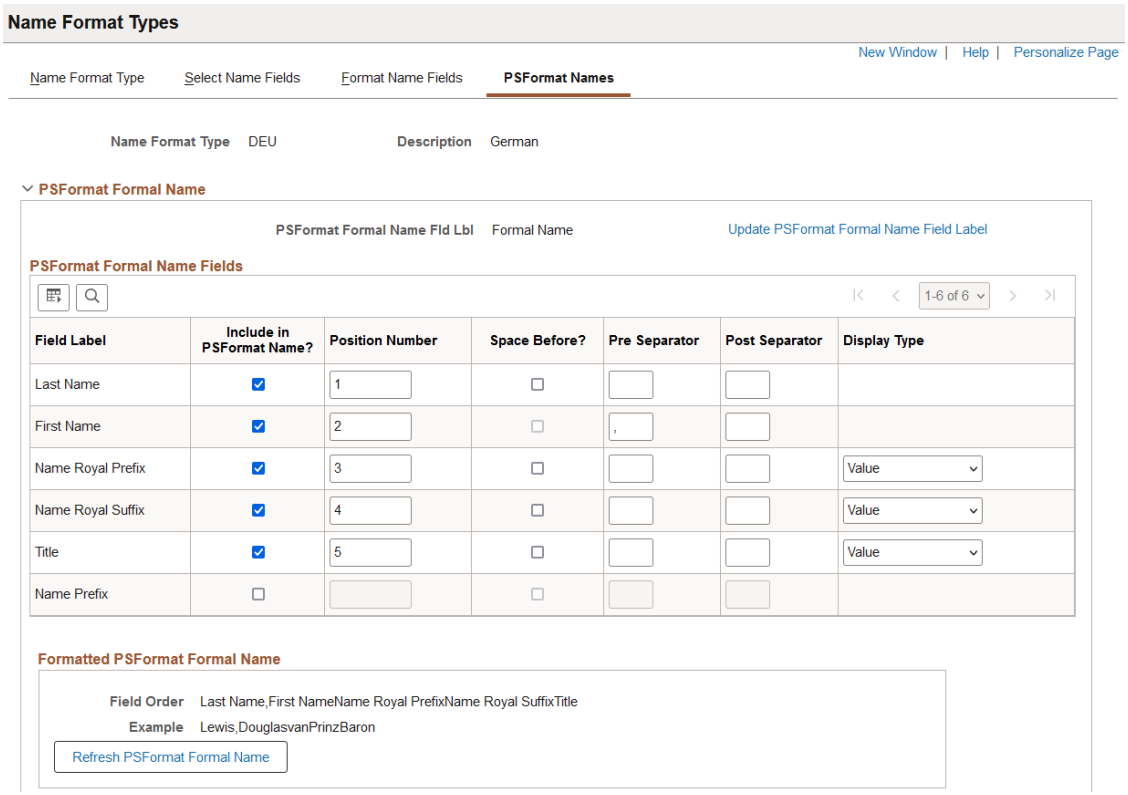
PSFormat Names Page

Use the PSFormat Names page (NAME_FORMAT_PSF) to define how to build the employee's formal and display name for the PeopleSoft Name (NAME and NAME_FORMAL_PSF fields).

Navigation:

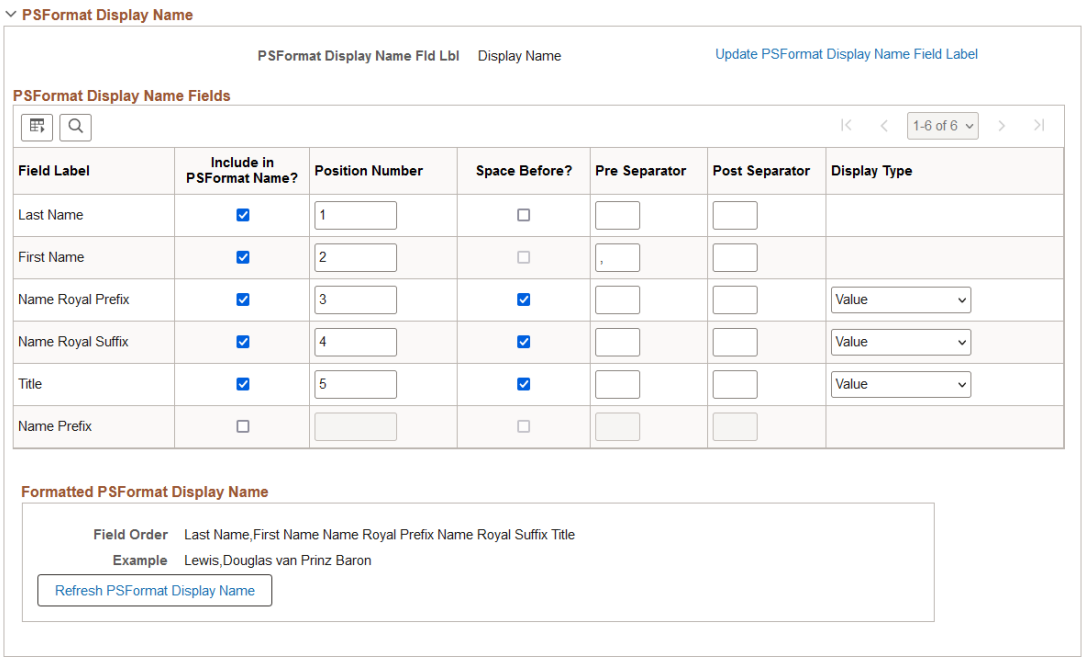
Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Format Types**, and then **PSFormat Name Configuration**

This example illustrates the fields and controls on the PSFormat Names page (1 of 2).



This example illustrates the fields and controls on the PSFormat Names page (2 of 2).

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> **Note**
>
> The page will always display the **Formal Name** and **Display Name** sections, even if you do no have **Use Formal and Display Name Groups** selected on the Name Format Type Page. When the name group options is not enabled, both sections will show the same fields. When selected, each section will show only those fields that have been configured for that section on the Select Name Fields Page.

> **Important**
>
> The Refresh Name Display process (**Set Up HCM**, and then **System Administration**, and then **Database Processes**, and then **Refresh Name Display Values**) should always be run whenever a change is made in this component. For information on this process, see the Refresh Name Display Values Page.

The NAME and NAME_FORMAL_PSF fields use the PeopleSoft Name field format, which automatically removes any spaces before and after the first comma that is included in the name. Because of this, there is no use selecting the **Space Before** option for a name component immediately following or preceding the first comma separator.

The fields that appear in the group box sections are set on the Select Name Fields Page.

The setup for this page is similar to that on the Format Name Fields Page. See this page for setup information and field definitions.

Name Type Page

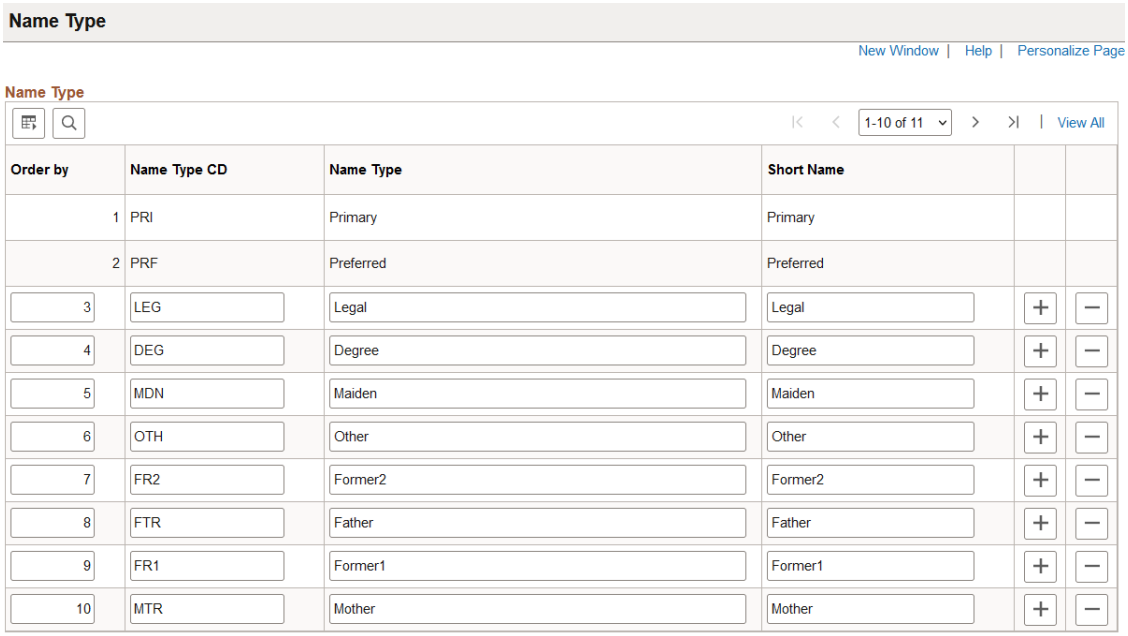
Use the Name Type page (NAME_TYPE_TBL) to define name types.

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Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Type**, and then **Name Type**

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



Field or Control	Description
Order by	Enter the order in which the system should make this name type available.
Name Type CD (name type code), **Name Type,** and **Short Name**	Enter a code for the name type, the full name type name, and a short version of the name type.

> **Note**
>
> You cannot edit the Primary and Preferred name types because they are system data.

Name Prefix Page

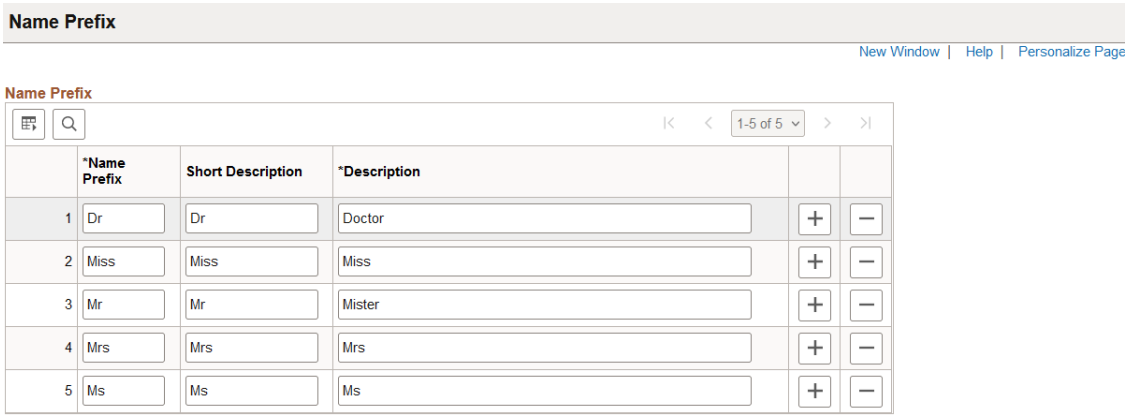
Use the Name Prefix page (NAME_PREFIX_TABLE) to enter name prefixes that you'll use when you record name information.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Prefix**, and then **Name Prefix**

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



Field or Control	Description
Name Prefix	Enter the name prefix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name prefixes. The system displays the prefixes you enter here as part of the person's name. **Note:** Name prefixes aren't effective-dated, nor do they have a status associated with them.

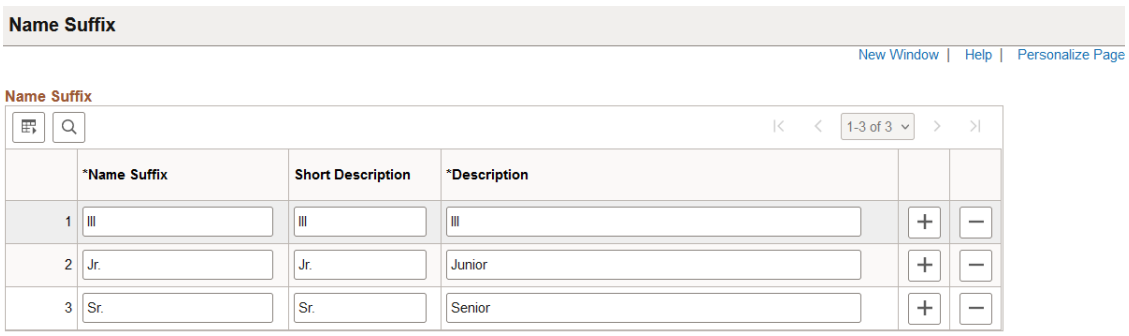
Name Suffix Page

Use the Name Suffix page (NAME_SUFFIX_TABLE) to enter name suffixes to use to record name information.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Name Suffix**, and then **Name Suffix**

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



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Field or Control	Description
Name Suffix	Enter the name suffix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name suffixes.
Short Description and **Description**	Descriptions you enter for the prefix appear on the page as part of the person's name.

> **Note**
>
> Name suffixes aren't effective-dated, nor do they have a status associated with them.

Royal Name Prefix Page

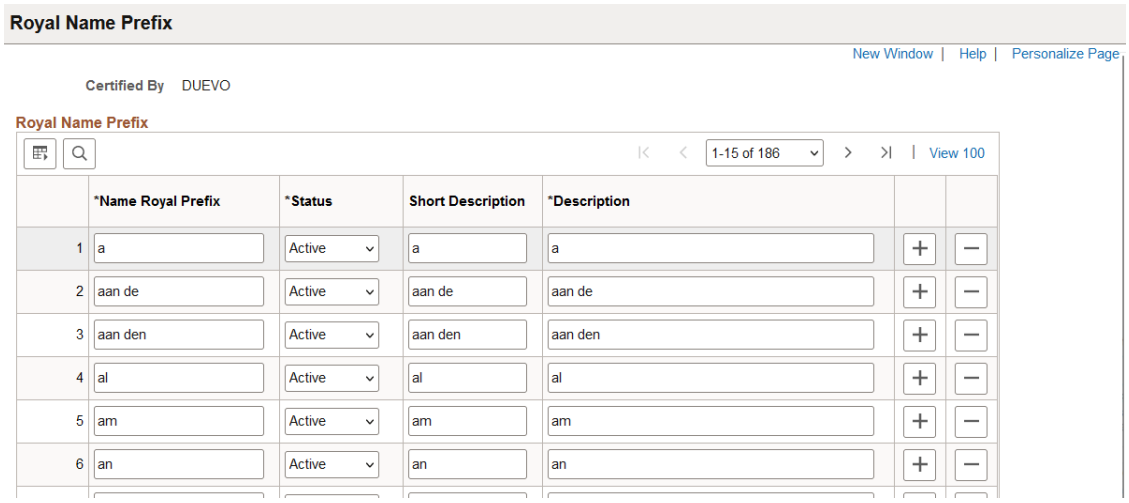
Use the Royal Name Prefix page (NM_ROYAL_PREFIX) to enter royal prefixes and descriptions.

Royal Name Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Royal Name Prefix**, and then **Royal Name Prefix**

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



Field or Control	Description
Certified By	Displays the value you selected when you accessed the page: *DUEVO* for German prefixes or *NEN* for Dutch prefixes.

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Field or Control	Description
Royal Name Prefix	Enter a royal prefix name, using up to 15 characters.
Status	Royal Name Prefixes aren't effective-dated, so to retire a prefix code, change the status to *Inactive*.

Royal Name Suffix Page

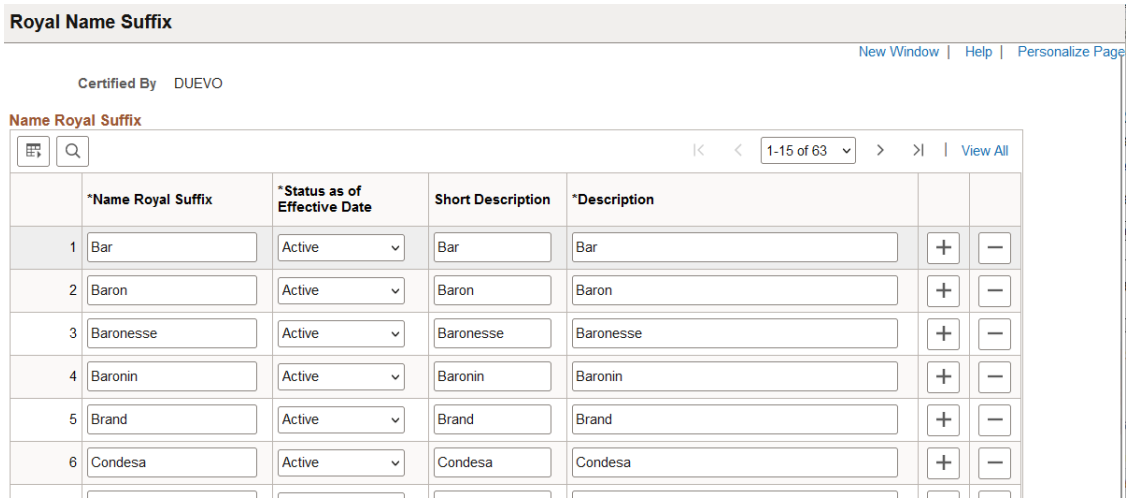
Use the Royal Name Suffix page (NM_ROYAL_SUFFIX) to define royal suffixes.

The Royal Name Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names in the Personal Data pages, you can reference these standard Royal Name Suffixes.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Royal Name Suffix**, and then **Royal Name Suffix**

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



Field or Control	Description
Certified By	The system displays the value you selected to access the page: *DEUVO* for German prefixes or *NEN* for Dutch prefixes.
Royal Name Suffix	Enter a Royal Name Suffix, using up to 15 characters.
Status as of Effective Date	Royal Name Suffixes aren't effective-dated, so to retire a suffix code, change the status to *Inactive*.

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Setting Up Gender Details

To help support organizations with their employee diversity and inclusion, the HCM system tracks gender identity and expression information for employees.

To set up gender details, use the Gender Configuration (GENDER_CONFIG) and Gender Details (GENDER_EXPR_DTL) components.

This topic provides an overview of gender identity tracking and discusses how to set up gender details.

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

Related Topics

- PeopleSoft eProfile: Personal Details Dashboard
- PeopleSoft eProfile: Gender Identity Page
- PeopleSoft Human Resources Administer Workforce: <Gender Field Label> Values Page
- PeopleSoft eProfile Manager Desktop: Using Fluid Approvals to Approve Gender Identity Changes
- PeopleSoft Human Resources Administer Workforce: Biographical Details Page

Pages Used to Set Up Gender Details

Page Name	Definition Name	Usage
Gender Configuration Page	GENDER_CONFIG	Relabel the **Gender** field or allow self service users to update their gender (current sex).
Gender Details Page	GENDER_EXPR_DTL	Define gender identity information by region such as birth sex, pronouns, orientation, and identity options. You can also enable attachments, allow a person to change their own data, and require acknowledgement.

Understanding Gender Identity Tracking

Employee diversity and inclusion is important to an organization because it fosters innovation, promotes better employee engagement and attracts new talented applicants.

The Gender Identity feature allows employees to self-identity their birth sex, current sex (previously called gender), pronouns, sexual orientation, and gender identity. This information is stored in Personal Data and HR administrators can manage this information from there. You can even choose to display a person's pronouns in the Company Directory.

Your organization can take advantage of the Gender Identity tracking functionality through these pages and procedures:

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1. Enable gender identity functionality on the Installation Table - HCM Options Page by selecting the **Enable Gender Identity** option.
2. Assign the *Fluid Dashboard - Person Dtls* role to the employee user profiles (**PeopleTools**, and then **Security**, and then **User Profiles**, and then **User Profiles**, and then **Roles**). This allows them to access the Personal Details dashboard, and in turn the Gender Identity pages when the functionality is enabled.
3. Create acknowledgement IDs using the Acknowledgement Framework, Enterprise Components: Acknowledgement Configuration Page. This information is used when employees agree to the self identification terms and conditions before they save their gender related details.
4. Set up gender configurations using the following tables:
   - Gender Configuration Page: Relabel the **Gender** field and allow employees to change their gender (current sex) on the self service pages.
   - Gender Details Page: Define gender-related field values for your regions. You also use this page to allow employees to update their own gender details, enable attachments on the employee self service Gender Details page, and identify an acknowledgement ID.
5. (Optional) Configure to display a person's pronouns on the Fluid Company Directory - Profile pages using the PeopleSoft Human Resources Administer Workforce: Chart and Profile Settings - Profile Content Page.
6. Employees view or update their gender information on the Personal Details - PeopleSoft eProfile: Gender Identity Page and PeopleSoft eProfile: Gender Details Page.

   The ability for employees to update information is based on the configuration settings (see item 4 in this list).
7. Managers approve an employee's gender/current sex updates using the PeopleSoft eProfile Manager Desktop: Pending Approvals - Gender Identity Change Page.

   When approved, the system inserts a new **Biographical History** effective dated row in Personal Data with the updated gender information.
8. HR administrators review or update gender information for an individual on the PeopleSoft Human Resources Administer Workforce: Biographical Details Page of Personal Data.

   This is particularly useful if self service users are not permitted to update their own information.
9. All users can view an individual's pronouns next to the name on the Fluid Company Directory - Profile pages (see PeopleSoft Human Resources Administer Workforce: Using the PeopleSoft Fluid User Interface for the Company Directory). The Company Directory will display pronouns only for those who specified them so other employees know how to address them.

> **Note**
>
> This functionality must first be enabled on the Fluid Company Directory configuration (see item 5 in this list) to see pronouns.

Gender Configuration Page

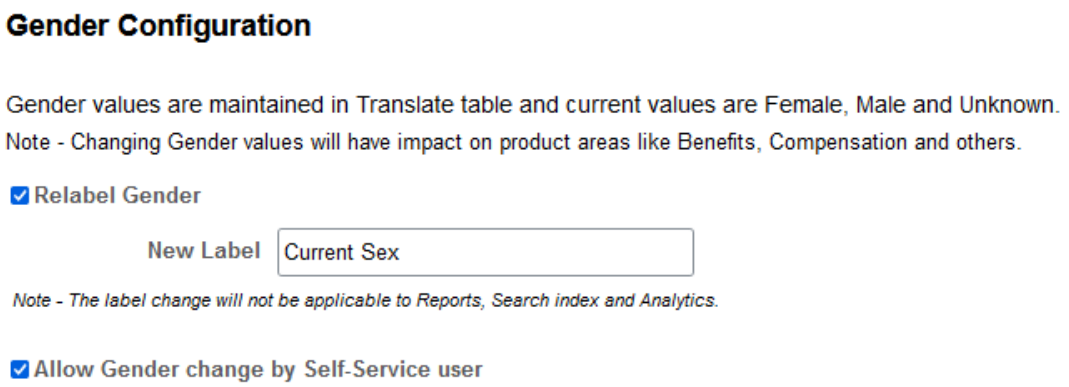
Use the Gender Configuration page (GENDER_CONFIG) to relabel the **Gender** field or allow self service users to update their gender (current sex).

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Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Gender Configuration**, and then **Gender Configuration**

This example illustrates the fields and controls on the Gender Configuration page.



Field or Control	Description
Relabel Gender and **New Label**	Select this option to display the **New Label** field and change the name of the **Gender** field label. This will change the field label throughout the HCM system. The **New Label** field provides *Current Sex* as the new label value by default, but you can overwrite this and enter one of your own. **Note:** If you select the **Relabel Gender** check box, you must provide a new label.
Allow Gender change by Self-Service user	Select to enable the **Gender** (Current Sex) field on the Fluid Personal Details - PeopleSoft eProfile: Gender Details Page. This allows the employee to update their current sex. Deselect this option to make the **Gender** field in employee self service display only. In this case, employees would need to contact the HR administrator to change their current sex.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Biographical Details Page

Gender Details Page

Use the Gender Details page (GENDER_EXPR_DTL) to define gender identity information by region such as birth sex, pronouns, orientation, and identity options. You can also enable attachments, allow a person to change their own data, and require acknowledgement.

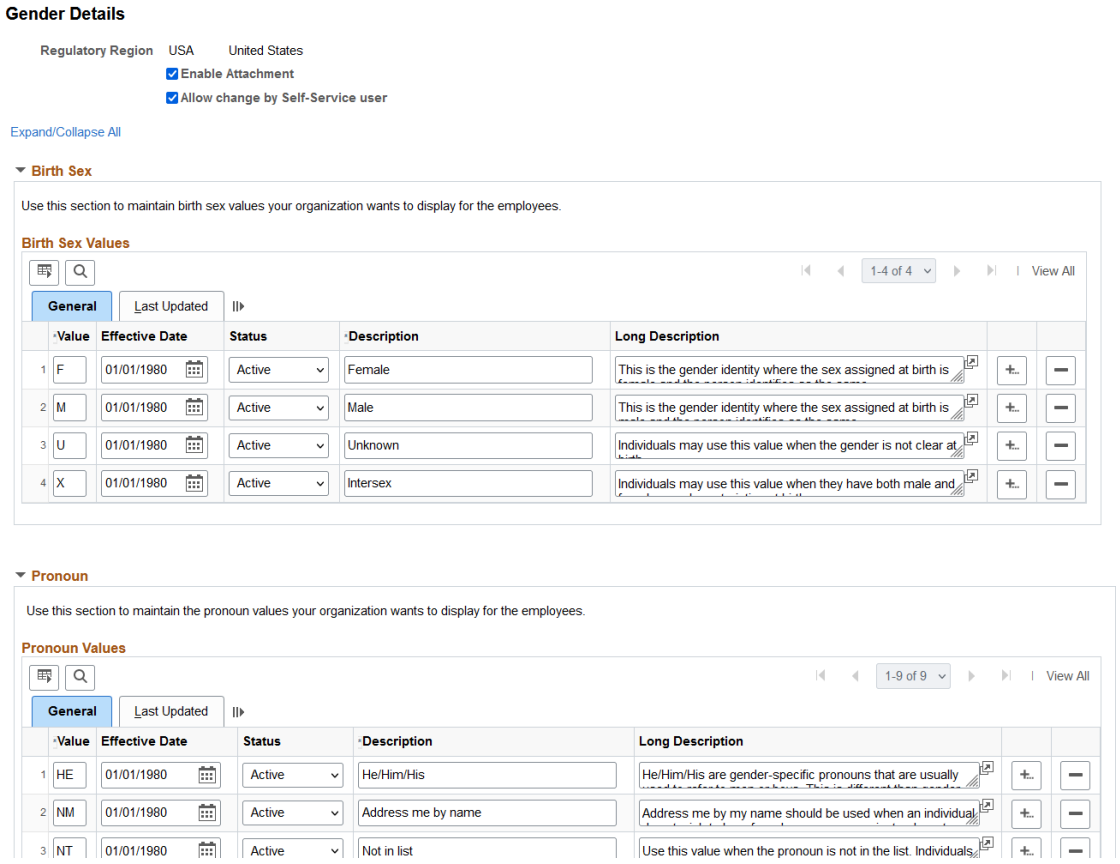
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> **Note**
>
> PeopleSoft HCM delivers gender identity and sexual orientation values for five regions – United States, Canada, United Kingdom, Australia and New Zealand. If your organization has a larger global presence outside of these five, you can add additional regions.

Navigation:

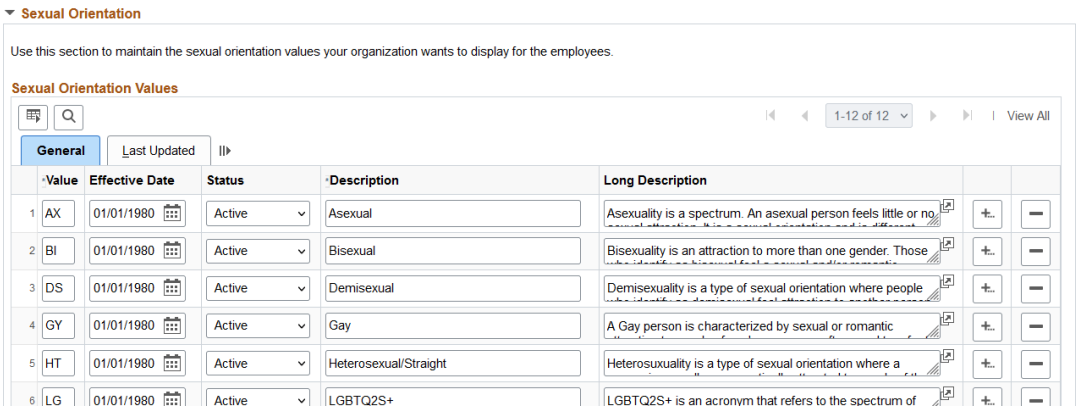
Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Gender Details**, and then **Gender Details**

This example illustrates the fields and controls on the Gender Details page (1 of 4).

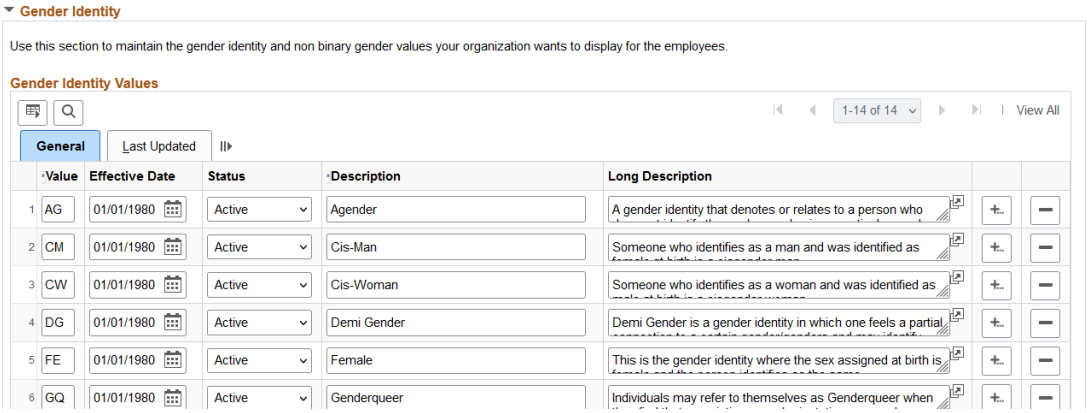


This example illustrates the fields and controls on the Gender Details page (2 of 4).

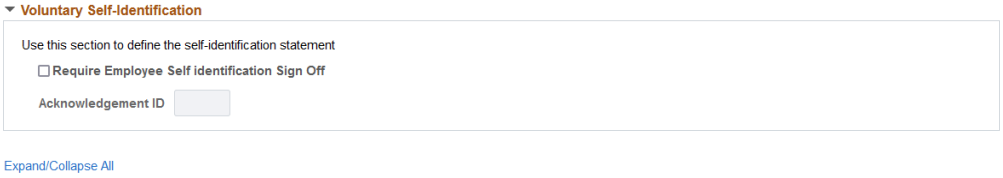
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This example illustrates the fields and controls on the Gender Details page (3 of 4).



This example illustrates the fields and controls on the Gender Details page (4 of 4).



Use this page to include the valid gender-related values by region that should be available to an employee or administrator, including the status and the last time it was updated. Employee's are assigned to a regulatory region on the Job Data - PeopleSoft Human Resources Administer Workforce: Work Location Page.

Field or Control	Description
Enable Attachment	Select this option to allow a person to add attachments, such as supporting documentation.

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Field or Control	Description
Allow change by Self-Service user	Select to enable the following fields on the Personal Details - PeopleSoft eProfile: Gender Details Page and allow a person to update their own information: • Birth Sex • Pronoun • Sexual Orientation • Gender Identity When you deselect this option, the gender-related fields will be display only in the Personal Details component.
Expand/Collapse All	Select the link to expand or collapse all the sections on this page.
Long Description	Enter a description that explains the meaning of a gender type value. This information will display on the PeopleSoft Human Resources Administer Workforce: <Gender Field Label> Values Page for the employee and HR administrator to aid in selecting the appropriate value for a field.

Birth Sex

Manage values by region that identify the sex assigned at birth.

Pronoun

Manage regional pronouns that identify how others should address a person.

Sexual Orientation

Maintain regional values that describe one's inherent attraction to a sexual partner.

Gender Identity

Define regional values that would describe one's inner sense or self perception of being male, female, a blend of both, or neither.

Voluntary Self-Identification

Field or Control	Description
Require Employee Self Identification Sign Off check box	Select to require an electronic signature on all submitted gender changes from the employee self service PeopleSoft eProfile: Gender Details Page. When you select this field, you must also specify an acknowledgement ID.
Acknowledgement ID	Enter the acknowledgement ID containing the message catalog entry for gender change acknowledgement. **Note:** You must first create acknowledgement IDs for gender identify on the Enterprise Components: Acknowledgement Configuration Page to add this value. See also Understanding Gender Identity Tracking.

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Defining Personal Address Types

To define personal address types, use the Personal Address Type component (ADDR_TYPE_TBL).

This topic discusses how to enter personal address types.

Page Used to Enter Personal Address Types

Page Name	Definition Name	Usage
Personal Address Type Page	ADDR_TYPE_TBL	Enter personal address types and the order in which they are available.

Personal Address Type Page

Use the Personal Address Type page (ADDR_TYPE_TBL) to enter personal address types and the order in which they are available.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Personal Address Type**, and then **Personal Address Type**

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

Personal Address Type

Address Type

1-10 of 13 View All

*Order by	Addr Type CD	Address Type	Short Type
1	HOME	Home	Home
2	MAIL	Mailing	Mail
3	BUSN	Business	Business
4	CHK	Check	Check
5	DORM	Dormitory	Dorm
6	LEGL	Legal	Legal
7	CAMP	Campus	Campus
8	OTH	Other	Other
9	BILL	Billing	Billing
10	OTH2	Other 2	Other 2

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Field or Control	Description
Order by	Enter the order in which the system should make this address available.
Addr Type CD (address type code), **Address Type,** and **Short Type**	Enter a code for the address type, the full address type name, and a short version of the address type.

> **Note**
>
> You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

Configuring Address and Contact Types for Fluid Self Service

To support the tracking of personal details in fluid self service, organizations can determine which address, phone, or email types employees are able to edit or not. Administrators can also identify specific address and contact types to hide.

To configure address and contact types for fluid employee self service, use the Address & Contact Type Config (TYPE_CNTL_ESS) component.

These topics discusses the pages that are used to configure the settings for fluid self service address and contact types.

This video provides an overview of the PeopleSoft employee self-service address configurability:

Video: Image Highlights, PeopleSoft HCM Update Image 46: Employee Self-Service Address Configurability

Pages Used to Configure Address and Contact Types for Fluid Self Service

Page Name	Definition Name	Usage
Address Type Control Page	TYPE_CNTL_ADDR_PG	Define which address types an employee can view, update, or delete in Personal Details self service.
Phone Type Control Page	TYPE_CNTL_PHONE_PG	Define which phone types an employee can view, update, or delete in Personal Details self service.
Email Type Control Page	TYPE_CNTL_EMAIL_PG	Define which email types an employee can view, update, or delete in Personal Details self service.

Address Type Control Page

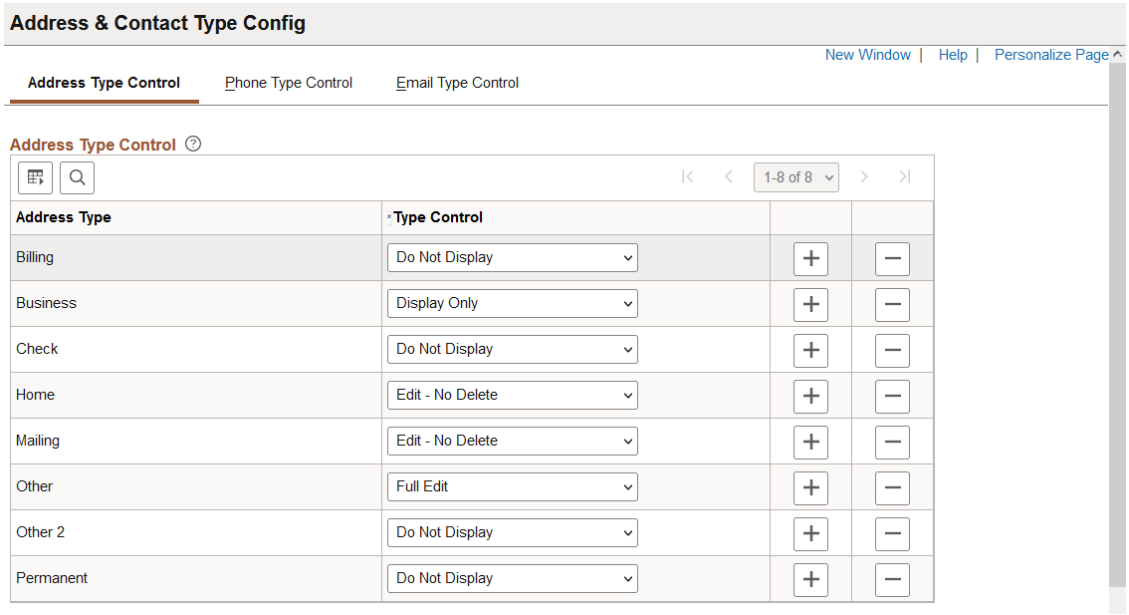
Use the Address Type Control page (TYPE_CNTL_ADDR_PG) to define which address types an employee can view, update, or delete in Personal Details self service.

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Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self Service**, and then **Address & Contact Type Config**, and then **Address Type Control**

This example illustrates the fields and controls on the Address Type Control page.



Field or Control	Description
Address Type	Displays the address type, such as *Business* or *Home*. Add or remove address types in regards to their availability on the Personal Details - PeopleSoft eProfile: Addresses (Summary) Page. Valid address types are defined on the Personal Address Type Page.
Type Control	Specify the type of control you want to give employees for an address type. Options include: • *Display Only*: Shows this address type without the ability to edit or delete. • *Do Not Display*: Hides this address type from the employee. • *Edit - No Delete*: Enables employees to add or edit this address type but does allow them to remove it from the Personal Details - Address page. • *Full Edit*: Allows employees to add, edit, or remove this address type from their Personal Details - Address page.

Related Topics

- PeopleSoft eProfile: Addresses (Summary) Page
- PeopleSoft eProfile: <Type> Address (Detail) Page

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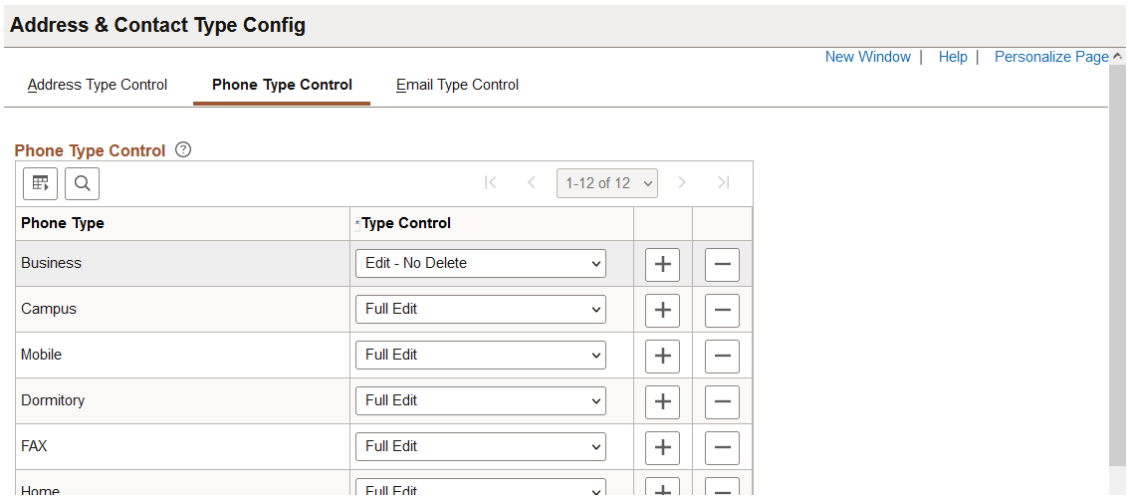
Phone Type Control Page

Use the Phone Type Control page (TYPE_CNTL_PHONE_PG) to define which phone types an employee can view, update, or delete in Personal Details self service.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self Service**, and then **Address & Contact Type Config**, and then **Phone Type Control**

This example illustrates the fields and controls on the Phone Type Control page.



Field or Control	Description
Phone Type	Displays the phone type, such as *Business*, *Home*, or *Mobile*. Add or remove phone types in regards to their availability on the Personal Details - PeopleSoft eProfile: Contact Details Page. Valid phone types are defined as translate values.
Type Control	Specify the type of control you want to give employees for a phone type. Options include: • *Display Only*: Shows this phone type without the ability to edit or delete. • *Do Not Display*: Hides this phone type from the employee. • *Edit - No Delete*: Enables employees to add or edit this phone type but does allow them to remove it from the Personal Details - Contact Details page. • *Full Edit*: Allows employees to add, edit, or remove this phone type from their Personal Details - Contact Details page.

Related Topics

- PeopleSoft eProfile: Contact Details Page

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- PeopleSoft eProfile: Phone Number Page

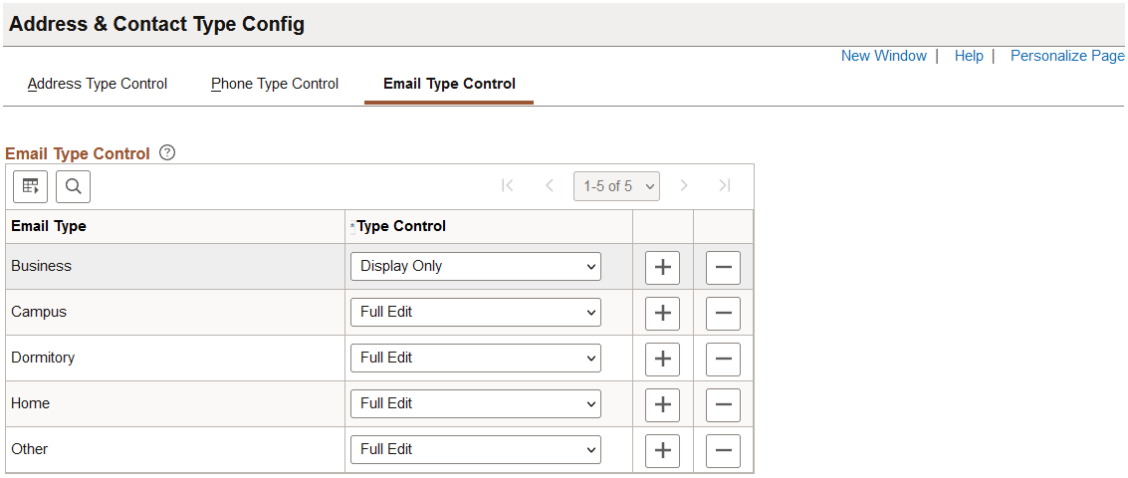
Email Type Control Page

Use the Email Type Control page (TYPE_CNTL_EMAIL_PG) to define which email types an employee can view, update, or delete in Personal Details self service.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self Service**, and then **Address & Contact Type Config**, and then **Email Type Control**

This example illustrates the fields and controls on the Email Type Control page.



Field or Control	Description
Email Type	Displays the email type. Add or remove email types in regards to their availability on the Personal Details - PeopleSoft eProfile: Contact Details Page. Valid email types are defined as translate values.
Type Control	Specify the type of control you want to get employees for this email type. Options include: • *Display Only*: Shows this email type without the ability to edit or delete. • *Do Not Display*: Hides this email type from the employee. • *Edit - No Delete*: Enables employees to add or edit this email type but does allow them to remove it from the Personal Details - Contact Details pages. • *Full Edit*: Allows employees to add, edit, or remove this email type from their Personal Details - Contact Details pages.

Related Topics

- PeopleSoft eProfile: Contact Details Page

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- PeopleSoft eProfile: Email Address Page

Defining Social Media Types

To define social media types, use the Social Media Type component (SOCIAL_MEDIA_TYPE).

This topic discusses how to enter social media types.

Pages Used to Define Social Media Types

Page Name	Definition Name	Usage
Social Media Type Page	SOCIAL_MEDIA_TYPE	Enter social media types and URLs.

Social Media Type Page

Use the Social Media Type page (SOCIAL_MEDIA_TYPE) to enter social media types and URLs.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Personal**, and then **Social Media Type**, and then **Social Media Type**

This example illustrates the fields and controls on the Social Media Type page.

Social Media Type

Social Media

1-3 of 3

*Social Media ID	*Description	Status	URL
LINKEDIN	LinkedIn	Active	http://www.linkedin.com
FACEBOOK	Facebook	Active	http://www.facebook.com
TWITTER	Twitter	Active	http://twitter.com

Use this page to enter valid social networking sites to which your workers may belong. Employees will select from this list to identify their social media accounts on the PeopleSoft eProfile: Social Media (Detail) Page.

Field or Control	Description
Social Media ID	Enter a unique ID to identify the social media type. This value does not appear to the user.
Description	Enter the name that will appear as the social media type on the Social Media pages of the Personal Details component. (See the PeopleSoft eProfile: Social Media (Detail) Page).

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Field or Control	Description
URL	Enter the URL for this social media type. This will appear as a display only value to the user when he or she selects this media type.

The system will prevent you from deleting a social media type that is in use.

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15

Setting Up Jobs

Defining Job Subfunction and Job Function Codes

To define job subfunction codes, use the Job Sub function component (JOB_SUBFUNC_DEFN). To define job function codes, use the Job Function Table component (JOB_FUNCTION_TBL).

These topics provides an overview of job subfunction codes and function codes and discuss how to set them up.

Page Used to Define Job Function and Job Subfunction Codes

Page Name	Definition Name	Usage
Job Subfunction Page	JOB_SUBFUNC_DEFN	Set up and define job subfunction codes.
Job Function Page	JOB_FUNCTION_TBL	Set up and define job function codes. Define the relationship of subfunctions to job functions.

Understanding Job Subfunction and Job Function Codes

Use job subfunction codes to create subfunctions that can then be assigned to job function codes. For example, you can create a job subfunction code of Payroll that can then be assigned to the job function code of Finance and Accounting. It is also possible to set up profiles for job subfunctions and job functions, if desired.

Related Topics

- PeopleSoft Human Resources Manage Profiles: Understanding Managing Profiles

Job Subfunction Page

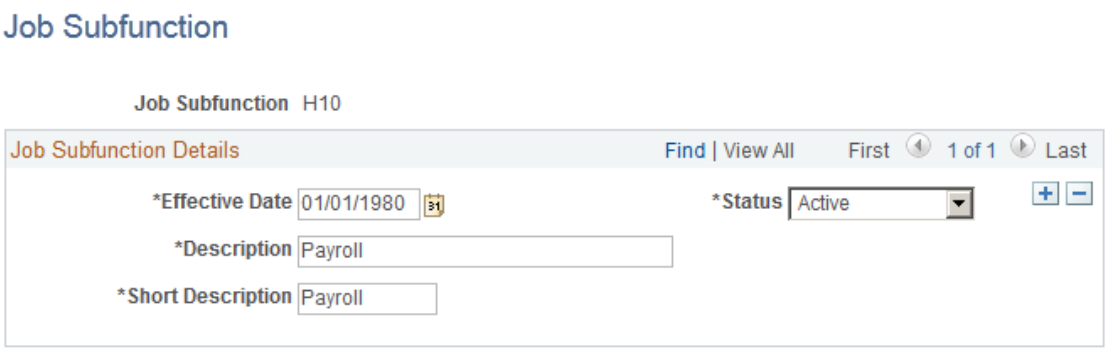
Use the Job Subfunction page (JOB_SUBFUNC_DEFN) to set up and define job subfunction codes.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Sub function**, and then **Job Subfunction**

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

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Job Function Page

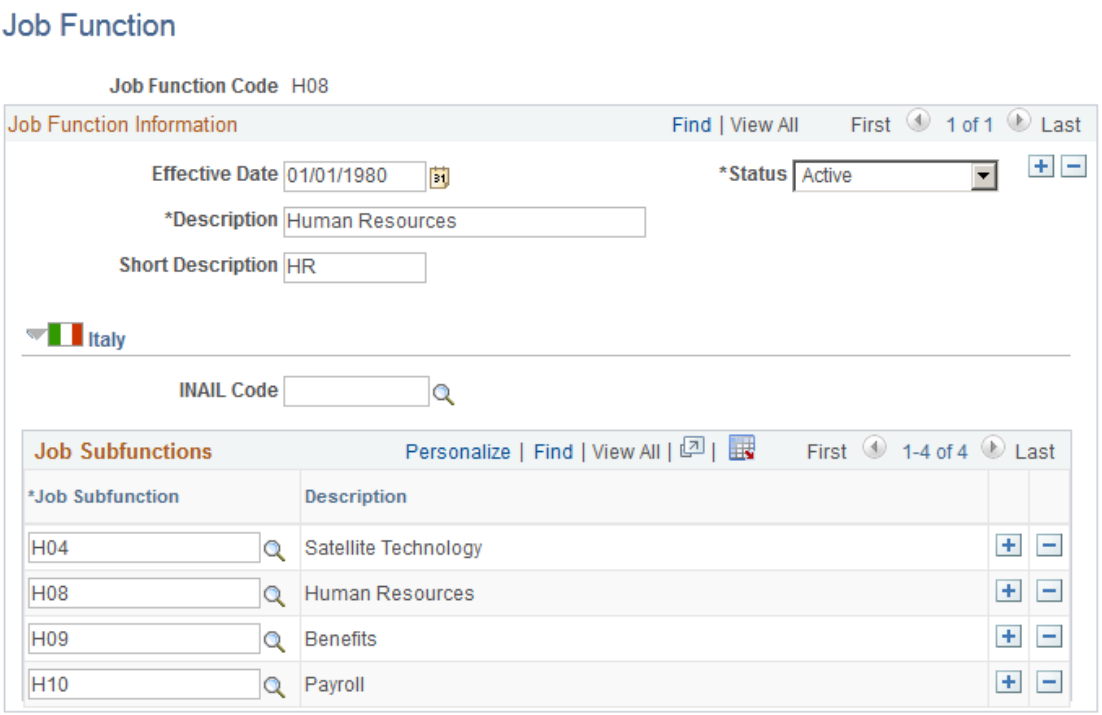
Use the Job Function page (JOB_FUNCTION_TBL) to set up and define job function codes.

Define the relationship of subfunctions to job functions.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Function**, and then **Job Function**

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



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(ITA) Italy

Field or Control	Description
INAIL Code (Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro code)	The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Defining Job Families

To define job families, use the Job Family Table component (JOB_FAMILY).

These topics provide an overview of job families and discuss how to group jobs into families.

Page Used To Set Up Job Families

Page Name	Definition Name	Usage
Job Family Table Page	JOB_FAMILY_TABLE	Create job families.

Understanding Job Families

Create job families to group similar jobs. Using Manage Profiles you can create profiles for job families that describe all the jobs in the family.

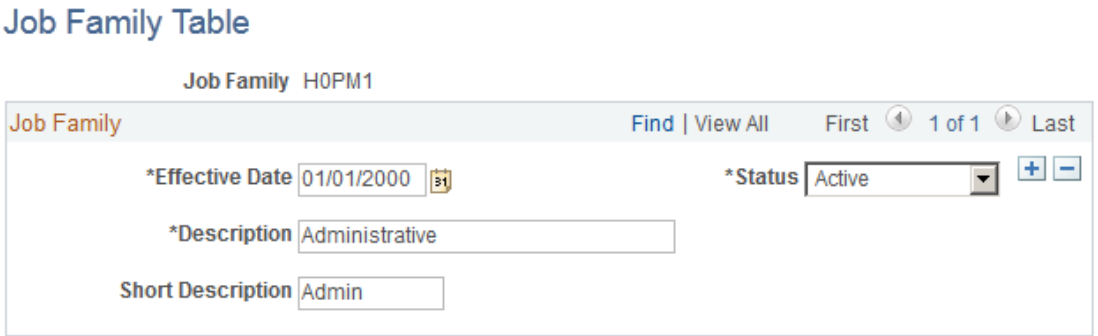
Job Family Table Page

Use the Job Family Table page (JOB_FAMILY_TABLE) to create job families.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Family Table**, and then **Job Family Table**

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



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> **Important**
>
> The job family effective date must be effective as of the relevant job code effective dates.

Classifying Jobs

To classify jobs, use the Define Job Code component (JOB_CODE_TBL). Use the CI_JOB_CODE_TBL component interface to load data into the tables for this component.

These topics provide an overview of and discuss classifying job codes.

Pages Used to Classify Jobs

Page Name	Definition Name	Usage
Job Code Profile Page	JOBCODE_TBL1_GBL	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Business Units by Job Code Page	JOBCODE_BU	View all business units associated with the Set ID for this Job Code.
Evaluation Criteria Page	JOBCODE_TBL2_GBL	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Market Pay Match Page	JOBCD_MP_SAL_SURV	Associate a market pay matrix to a specific job code.
Default Compensation Page	JOBCD_COMP_RATE	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page.
Non-Base Compensation Page	JOBCD_NON_BASE	Associate non-base rate codes with a job code.

Understanding Job Codes

In HCM, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code

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defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Job Codes and Positions in HCM

In HCM, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with workers. Job codes have a one-to-many relationship with workers.

You still use job codes to create general groupings or job classifications in your organization if you drive PeopleSoft Human Resources by position in your organization. You then use the Job Code groupings as the basis for default job data for positions.

> **Note**
>
> If you use PeopleSoft Pension Administration, set up jobs, and not positions, for your pension payees. You can use Manage Profiles to set up profiles for your job codes.

See PeopleSoft Human Resources Manage Profiles: Understanding Managing Profiles.

(JPN) Using Job Codes and Capability Grade Management in Japan

The **Job Code** field on the Job Details page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the **Job Code** field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

Related Topics

- PeopleSoft Human Resources Manage Positions: Understanding Positions

Job Code Profile Page

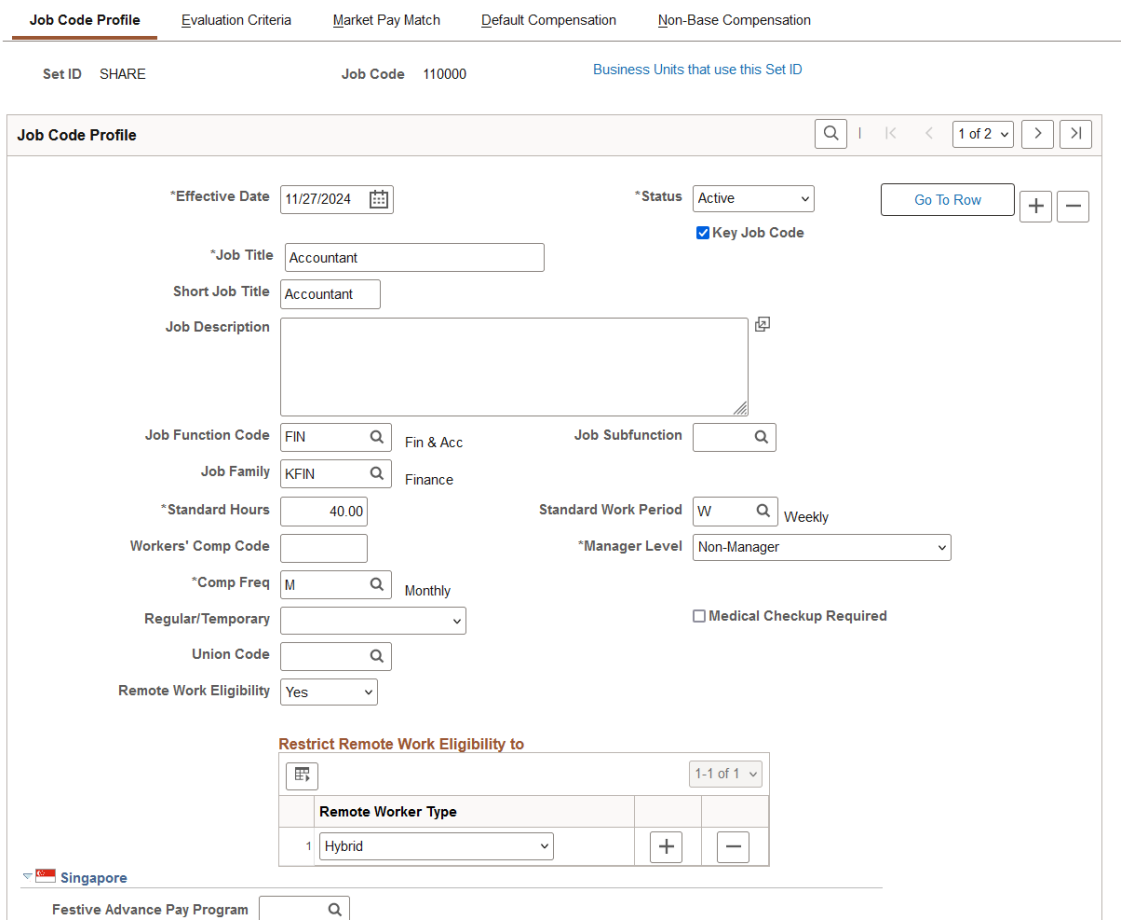
Use the Job Code Profile page (JOBCODE_TBL1_GBL) to add new job codes to the system and define job family, compensation, and regulatory information for each job code.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Define Job Code**, and then **Job Code Profile**

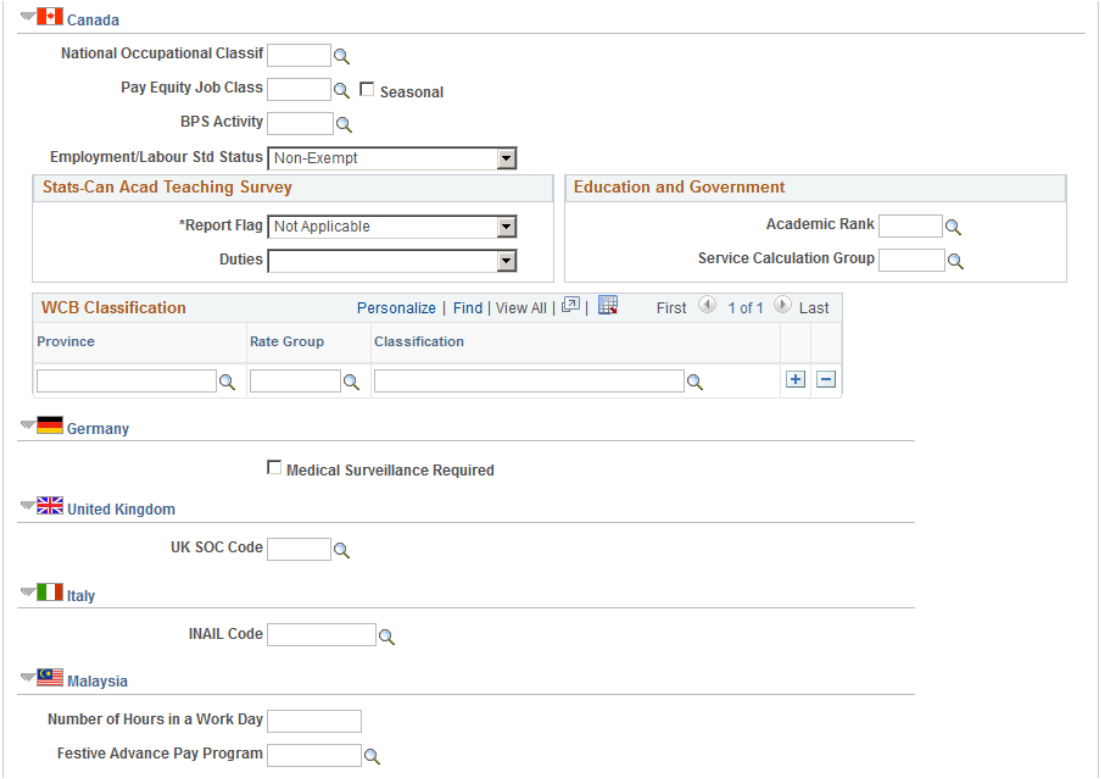
This example illustrates the fields and controls on the Job Code Profile page (1 of 5). You can find definitions for the fields and controls later on this page.

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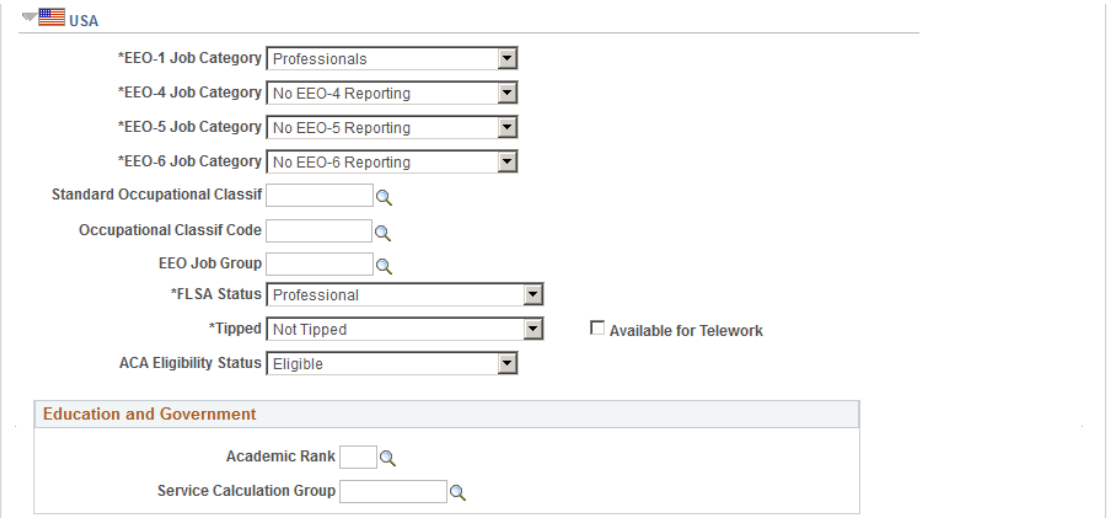


This example illustrates the fields and controls on the Job Code Profile page (2 of 5). You can find definitions for the fields and controls later on this page.

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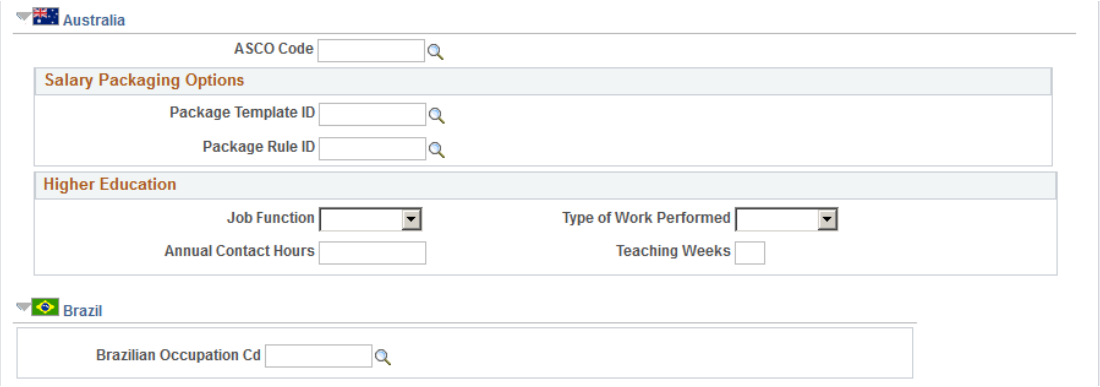


This example illustrates the fields and controls on the Job Code Profile page (3 of 5). You can find definitions for the fields and controls later on this page.

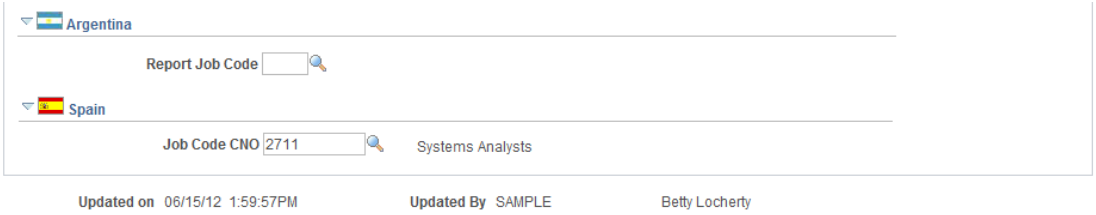


This example illustrates the fields and controls on the Job Code Profile page (4 of 5). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Job Code Profile page (5 of 5). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Job Code	A unique code that you associate with a specific job in your organization.
Key Job Code	Select this check box if it is a key job for your organization's succession planning.
(USF) Occupation Series, Official Posn Title Code (official position title code), and **Organization Posn Title Cd** (organization position title code)	Select from the list. This fields are available on the federalized database for users authorized to view federal information.
Job Function Code	Select the code that best categorizes the job by function, such as administrative, legal, or management.
Job Subfunction	Select the code that best categorizes the job's subfunction.
Job Family	Select a job family to categorize a job code into a more general grouping. For example, you might group a trust analyst and an operations analyst into a job family called *Analyst.*

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Field or Control	Description
Standard Hours	Enter the default number of hours in a standard work period for this job. The **Standard Hours** value that you enter on this page becomes the default for all workers who are associated with this job code. You can modify the standard hours for an worker on the worker's Job Data pages (JOB_DATA). The value that you assign for **Standard Hours** must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences table. If no minimum standard hours and maximum standard hours are defined on the Primary Permission List Preferences table, the system uses the values on the Installation table.
Standard Work Period	Select the time period in which workers must complete the standard hours. Maintain these values in the Frequency Table page (FREQUENCY_TBL). The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency). See *PeopleSoft: Enterprise Components*.
Workers' Comp Code (Workers' Compensation code)	Enter a code to specify the workers' compensation plan to which this job code belongs.
Manager Level	Select the level of management associated with the employee.
Comp Freq (compensation frequency)	Select the frequency in which the compensation is quoted. The default value is the frequency that you specified on the Installation table
Medical Checkup Required	Select if this job code requires a onetime medical checkup when the worker is hired into the job. **Note:** If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.
Union Code	If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations business process in PeopleSoft Human Resources.

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Field or Control	Description
Remote Work Eligibility	**Important:** Remote work eligibility can be defined for the job code as well as position. When remote work eligibility is defined for both the employee's job code and position, the position configuration always takes precedence. Indicate if this job code is eligible for remote work. Options include: • *Blank*: No eligibility is define. When no eligibility is defined, employees with this job code can be eligible for remote work types if the position for an employee allows remote work or the override is enabled. • *No*: Select to indicate that this job is not eligible for remote work. Note that employees with this job code can still be eligible for remote work if the position for an employee allows remote work or the override is enabled. • *Yes*: Select this option to indicate that this job code is eligible for remote work. The page displays the **Restrict Remote Worker Eligibility to** grid, where you can select remote worker types that are eligible with this job code, which allows you to restrict the type of remote work employees can request. **Note:**By enabling remote worker eligibility, the system will display the Remote Worker tile in fluid for employees that hold this job and have been granted the *Fluid Remote Worker Employee* role. However, if an employee with this job code is in a position that is not eligible for remote work and the override is not enabled, the employee will not have access to the tile or be able to submit requests for remote work. To override the job code remote worker eligibility settings, see the PeopleSoft Human Resources Administer Workforce: Remote Worker Configuration Page. To understand the rules that drive remote worker eligibility and the values available to the employee, see PeopleSoft Human Resources Administer Workforce: Understanding Remote Work Eligibility for Employee Requests. 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

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Restrict Remote Work Eligibility to

This section is available when you select *Yes* for the **Remote Work Eligibility** field.

Field or Control	Description
Remote Worker Type	Select which remote worker types are eligible with this job code. Delivered Remote Worker Type translate values are *Hybrid* and *Fully Remote*. Job code Remote Worker Type values are used when an employee is in a position that has not been configured for remote work eligibility (eligibility is blank). In this case, employees in this job can select only from these job code values. For example, if only *Hybrid* is entered for the job code, only the *Hybrid* option will be available for the employee when entering a remote worker request. **Note:** When you do not select remote worker types and this grid is left blank, all remote worker types are eligible and available for employees with this job code when job code values are used. See also PeopleSoft Human Resources Administer Workforce: Understanding Remote Work Eligibility for Employee Requests.

This video provides an overview of the PeopleSoft Insights feature:

Video: Image Highlights, PeopleSoft HCM Update Image 51: Restrict Remote Worker Type by Job Code/Position and Limit Retroactive Requests

(SGP) Singapore

Field or Control	Description
Festive Advance Pay Program	If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here. The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods. This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

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(CAN) Canada

Field or Control	Description
National Occupational Classif (National Occupational Classification)	Select a Canadian National Occupation classification code.
Seasonal	Select if the job is seasonal.
BPS Activity (Business Payrolls Survey activity)	If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.
Employment/Labour Std Status (employment and labour standards status)	Choose whether this job is *Exempt* or *Non-Exempt* according to the provincial Employment Standards Act or Labour Standards Act. This value becomes the default for the **Employment/Labour Std Status** field on positions that are associated with this job code and on worker job records that are associated with this job code.
Report Flag	Select the *Both Surveys*, *Full-Time Survey*, *Part-Time Survey*, or *Not Applicable* to indicate whether the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys. This field is for Canadian higher education degree-granting institutions only.
Duties	Indicate whether the duties of the job code consist of *Research*, *Teaching Only*, or *Teaching & Othr Responsibility* (teaching and other responsibilities). This field is required if you selected an option other than *Not Applicable* in the **Report Flag** field. This field is for Canadian higher education degree-granting institutions only.
Academic Rank	Select the academic rank that is associated with this job code. Set up values for this field on the PeopleSoft Human Resources Track Faculty Events: Academic Rank Page.
Province	Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.
Rate Group	Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.
Classification	Select a WCB classification for this job code. The classification indicates the industry that applies to this job code. **Note:** The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.

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(DEU) Germany

Field or Control	Description
Medical Surveillance Required	Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

Field or Control	Description
UK SOC Code (United Kingdom Standard Occupational Classification code)	Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Fair Employment reporting.

(ITA) Italy

Field or Control	Description
INAIL Code	Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Field or Control	Description
Number of Hours in a Work Day	Enter the standard workday hours that are used for payroll and leave calculations.
Festive Advance Pay Program	If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here. The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods. This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

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(USA) USA

Field or Control	Description
EEO Job Categories	Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC). To retrieve valid job codes for EEO-1 reporting, select a EEO-1 job category that is not equal to *No EEO-1 Reporting*.
Standard Occupational Classif (Standard Occupational Classification)	If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.
EEO Job Group	To further classify the job categories, enter the EEO job group to which this job belongs.
FLSA Status (Fair Labor Standards Act status)	Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all worker job records that are associated with this job code. Example values are *Administrative, Executive, Nonexempt,* and *Professional.*
Available for Telework	(Classic) Select if this job allows workers to work remotely. **Note:** Selecting this option does not enable Fluid remote worker functionality. Use the **Remote Work Eligibility** field for Fluid functionality. (USF) When creating a U.S. federal job, select this option to enable the **Remote/Telework Type** field in the **US Federal** section. **Note:** (USF) Federal functionality is not tied to the Fluid Remote Worker feature. Selecting this check box does not enable Fluid Remote Worker functionality for Federal users.

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Field or Control	Description
ACA Eligibility	Enter the default ACA eligibility for this job code. This value will be provided by default to the employee's record, where it can then be overwritten, if needed. Valid values are: • *Always Eligible:* For example, a salaried full-time employee who is always eligible for benefits. • *Eligible:* An employee whose average hours is equal to or above the minimum hours/ week or hours/month so that the employee is considered Benefits Full Time. The employee is eligible for benefits • *Excluded:* For example, volunteer employees, student employees, members of religious orders. • *Ineligible:* An employee whose average hours is below the minimum hours/week or hours/month so that the employee is considered Benefits Part Time. The employee is not eligible for benefits. • *To be determined:* Unable to determine whether the employee is Benefits Part-Time or Full-Time. Human Resources needs to review and determine the employee's ACA Eligibility status. **Note:** When a new hire is entered in the system, the value that is set in the respective Job Code record is passed to Benefits. Therefore, you should analyze all Job Code table data for your organization and set the appropriate value for this field.

(AUS) Australia

Field or Control	Description
ANZSCO Code (Australian and New Zealand standard classification of occupation code)	Select the ANZSCO code.
Package Template ID and **Package Rule ID**	Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here. By associating templates and rules with job codes, package components are automatically assigned to workers during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling. **Note:** You set up package templates on the Package Template page. You set up package rules on the Package Rule page.

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(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Field or Control	Description
Job Function	Select the default job function for the organization.
Type of Work Performed	Select the default type of work performed for the organization.
Annual Contact Hours	Enter the number of contact hours. This depends on the type of work performed. See "Determining Contact Hours" to calculate this value.
Teaching Weeks	Enter the default number of teaching weeks.

(BRA) Brazil

Field or Control	Description
Brazilian Occupation Cd (Brazilian occupation code)	Enter the appropriate Brazilian Code of Occupation (CBO - Código Brasileiro de Ocupações) from the official table. If this job code is created for the Brazilian country extension, you must specify a Brazilian occupation code in this field. Brazilian occupation codes are defined on the PeopleSoft Human Resources Administer Workforce: CBO Codes BRA Page.

Argentina

Field or Control	Description
Report Job Code	Enter a job code for My Simplification reporting. Valid values are defined in the Report Job Codes component.

Spain

Field or Control	Description
Job Code CNO	Enter the national occupation code that you want to map to the selected PeopleSoft HCM job code.

Fields at the bottom of the page

The following fields appear at the bottom of the page.

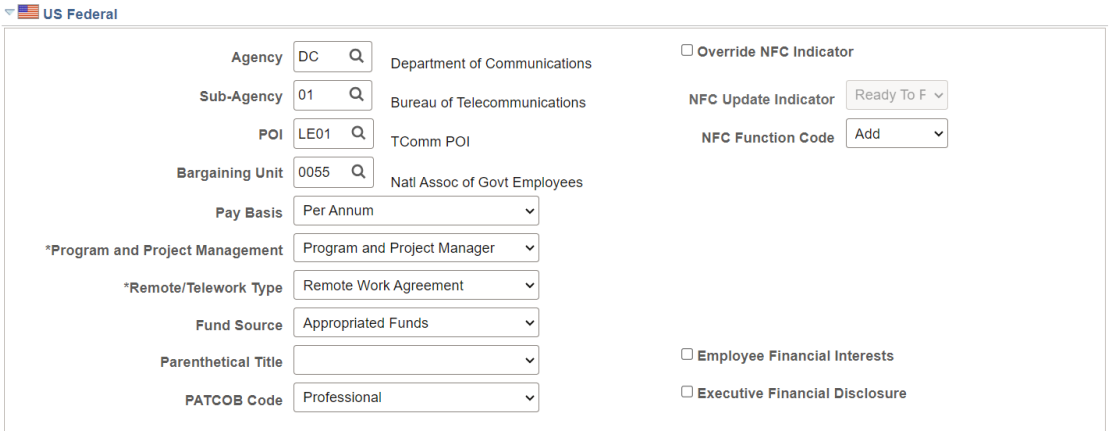
Field or Control	Description
Updated On	Last updated timestamp for this jobcode.
Updated By	Last updated by user information

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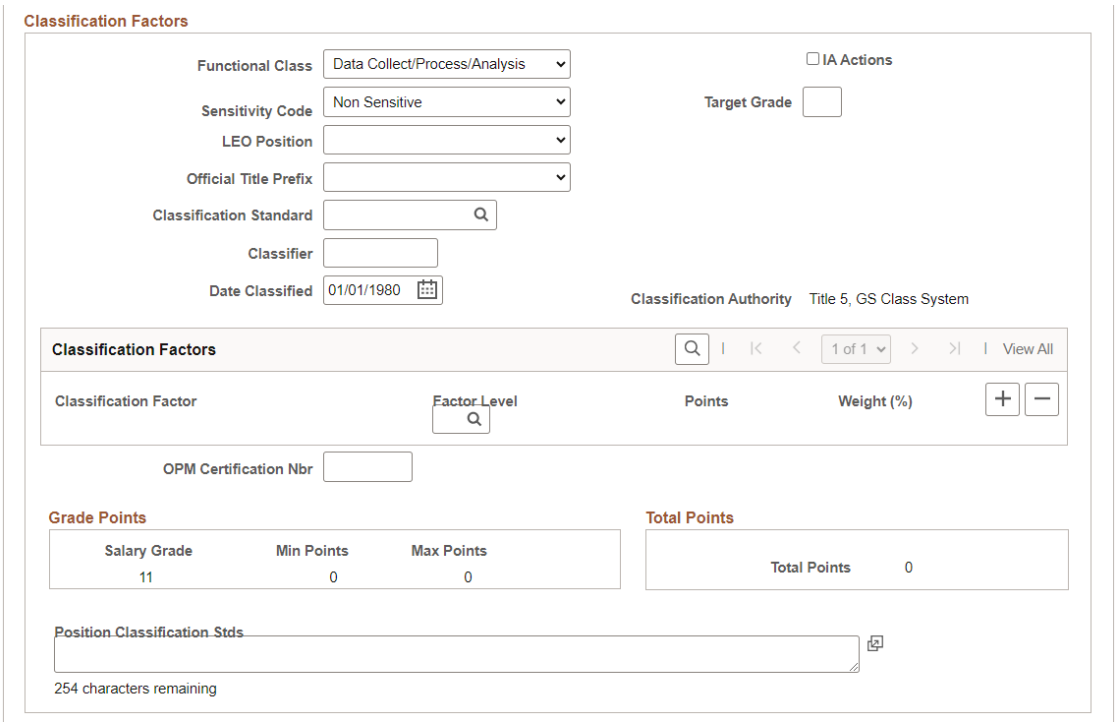
(USF) US Federal

These fields are available when you work in a federalized (U.S. Federal) database:

This example illustrates the fields and controls on the Job Code Profile page – US Federal section (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 Job Code Profile page – US Federal section (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Override NFC Indicator	Select this check box to override the value in the **NFC Update Indicator** field.

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Field or Control	Description
NFC Update Indicator	Status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include: • *In Process* – This Jobcode has been run through the export program and will be sent to NFC. • *Not Ready* – User intends to exclude this Jobcode from export to NFC. • *Other* – Status maintained by system user. • *Ready* – User intends to include this Jobcode in the next NFC export. • *SINQ* – This Jobcode has not successfully passed NFC's PINE Edits and needs correction.
NFC Function Code	Identifies the task to be performed by NFC on a primary record. Options in this field include *Add, Change, Delete, Inactivate*, and *Reactivate.*
Bargaining Unit	If the job code is associated with a union, select a bargaining unit.
Pay Basis	Enter the pay basis for which you quote salaries for this job code; for example, *Per Annum, Per Hour*.
Program and Project Management	**Note:** This field is available for job rows with the effective date of August 2, 2023 or later. Specify the managerial position for this job code, which can be used for reporting to the OPF.
Remote/Telework Type	**Note:** This field is available for job rows with the effective date of September 1, 2023 or later and editable when the **Available for Telework** check box is selected on the Job Code Profile - USA section. Identify the remote worker/teleworker agreement type for this job, which can be used for reporting to the OPF.
Classification Factors	The system displays the classification authority and the classification factors that are associated with the classification standard.
Target Grade	Enter the target grade of the job, if applicable.
Official Title Prefix	NFC-defined list of title prefixes.
Factor Level	Enter a classification factor level for each classification factor that is associated with this classification standard.
Points, Grade Points, and **Total Points**	The system displays the points that are associated with the classification standard.
Weight (%)	The system displays the weight percentage of the points that are associated with the classification standard.
OPM Certification Nbr (office of personnel management certification number)	Enter the OPM certification number that is associated with this job code.

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Field or Control	Description
Position Classification Stds (position classification standards)	Enter the position classification standards that are used.

Related Topics

- PeopleSoft Human Resources Manage Profiles
- PeopleSoft Human Resources Administer Compensation
- PeopleSoft Human Resources Manage Positions: Understanding Positions
- PeopleSoft Human Resources Administer Festive Advance: Understanding Festive Advances
- PeopleSoft Human Resources Administer Salary Packaging: Understanding Salary Packaging Setup
- PeopleSoft Human Resources Track Faculty Events: Understanding DETYA Calculations and Reference Dates
- PeopleSoft Payroll for North America

Evaluation Criteria Page

Use the Evaluation Criteria page (JOBCODE_TBL2_GBL) to assign points to certain job evaluation criteria.

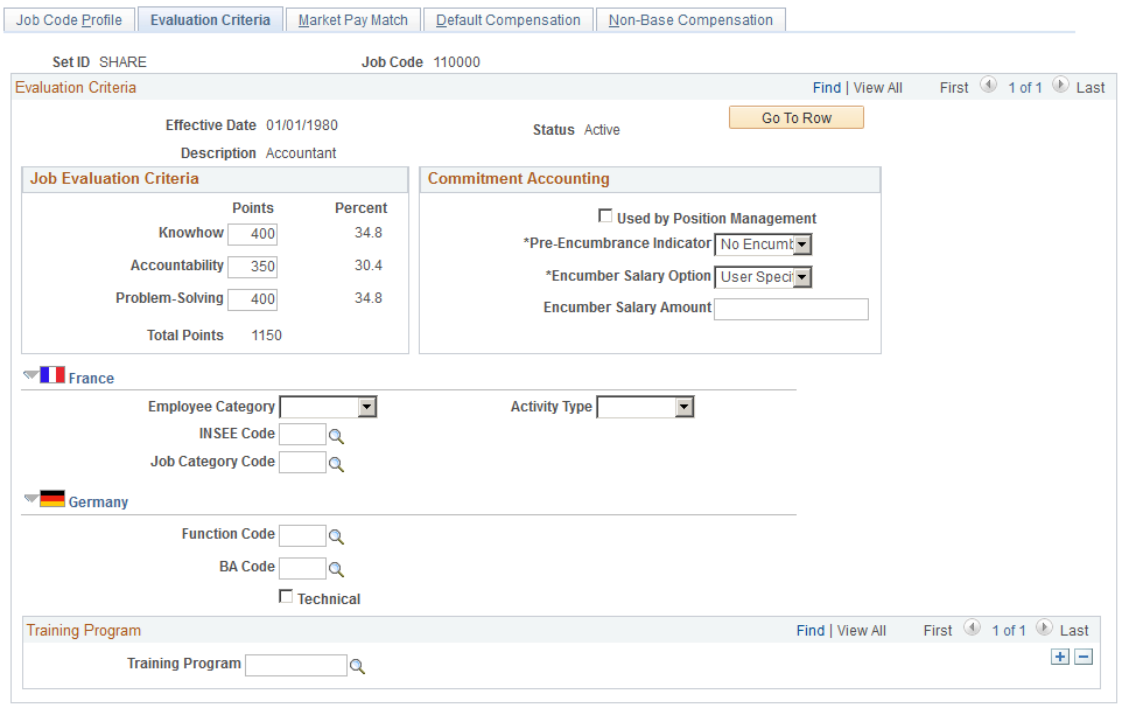
You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Define Job Code**, and then **Evaluation Criteria**

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

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Field or Control	Description
Knowhow	Enter points that represent the worker's knowledge required to perform the job.
Accountability	Enter points that represent the worker's ability to do the assigned job.
Problem-Solving	Enter points that represent the worker's ability to work out solutions despite obstacles.
Total Points	You determine the points by comparing each of these factors to every other job in your company. The greater the know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility. The system calculates **Total Points** and the **Percent,** or relative importance, of each factor. For example, if **Knowhow** receives 33.2 percent of the total points, **Accountability** receives 33.7 percent, and **Problem-Solving** receives 33.1 percent, then all three factors are almost equally important. However, if **Knowhow** receives 54.4 percent of the total points, **Accountability** receives 9.2 percent, and **Problem-Solving** receives 36.4 percent, then **Knowhow** is of greater importance than **Accountability** or **Problem-Solving,** and **Accountability** is of little significance.

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Field or Control	Description
Used by Position Management	Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default. A selected check box tells the system that you're budgeting for the job code at the position level. In Education and Government systems, deselecting this check box prevents you from attaching the job code to a position. In commercial and U.S. Federal systems, deselecting this check box does not restrict your ability to attach positions to a job code. That is, even if this check box is deselected, you can still set up a position with the job code. When you deselect this check box, the **Pre-Encumbrance Indicator** and **Encumber Salary Option** fields appear.
Pre-Encumbrance Indicator	Indicate if and when to pre-encumber for this job code by selecting one of these values: *Encumber Immediately, Encumber on Requisition,* or *No Encumbrance.*
Encumber Salary Option	If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.
Encumber Salary Amount	If you select *User Specified Amount* as the Encumber Salary Option, enter the salary amount to encumber.

(FRA) France

Field or Control	Description
Employee Category	Select the employee category for the job code. This code is required for these statutory reports: • Personal Register • Annual Survey by Nationality • French Accident report
INSEE Code (National Institute for Statistical and Economic Studies code)	Link this job code to an INSEE code for use in the French Disability report.
Job Category Code	Select a job category code, required for the Single Hiring Statement report.

(DEU) Germany

Field or Control	Description
BA Code (Bundesanstalt fuer Arbeit code)	Select this job code's BA code, if applicable.
Technical	Select if this job code is technical.

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(FRA) French Public Sector

Field or Control	Description
Job Type	Select whether this job is public, private, or public private combination.
Contract Worker Compensation	Select the salary grade table type and salary grade table that apply to contract workers in this job. See PeopleSoft Human Resources Manage French Public Sector: Setting Up Salary Grades.
Job Outside Coll Lbor Agrment (job outside the collective labor agreement)	Select this check box if the job code is not covered by a collective labor agreement.
Regulatory Region	Select the job code's regulatory region. **Note:** Labor agreements are grouped by regulatory region. If you are assigning a labor agreement to this job code, ensure that the regulatory region matches that of the labor agreement. See PeopleSoft Human Resources Manage Labor Administration: Defining Labor Agreements.
Labor Agreement	Select the labor agreement that covers this job code. See PeopleSoft Human Resources Manage Labor Administration: Defining Labor Agreements.
Labor Agreement Category	Select the labor agreement category for this job code. See PeopleSoft Human Resources Manage Labor Administration: Employee Labor Agreement Page.
Auto Hire Validation	Select to have the system automatically validate the newly hired person's qualifications with the job requirements.
Match Competencies	Select to have the system match the competencies associated with this job code with the qualifications of the person assuming the job.
Occupation Code	Select an occupation code for this job code.

Training Program

Field or Control	Description
Training Program	You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for workers in this job code, you can use the default training program as the basis for an individual career-training plan.

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Related Topics

- PeopleSoft Human Resources Manage Positions: Understanding Positions
- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding French Regulatory Requirements

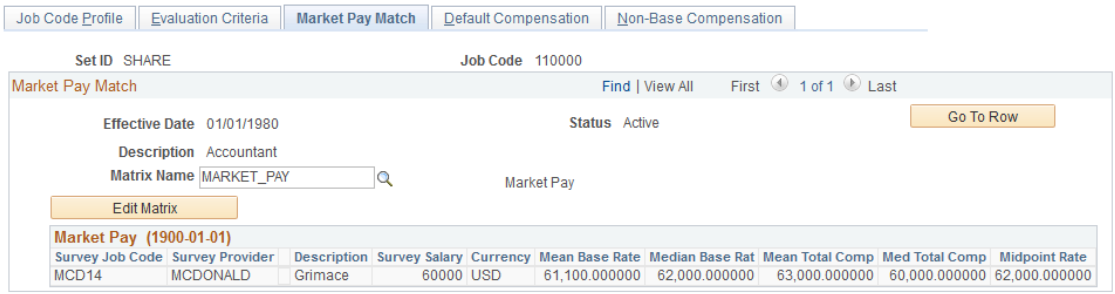
Market Pay Match Page

Use the Market Pay Match page (JOBCD_MP_SAL_SURV) to associate a market pay matrix to a specific job code.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Define Job Code**, and then **Market Pay Match**

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



Field or Control	Description
Matrix Name	Select the market pay matrix that you want to associate with this job code. The effective date of the matrix must be less than or equal to the effective date of the job code.
Edit Matrix	Click this button to access the Data Content page where you can view and edit values associated with this matrix. Any other job code linked to this same matrix will be impacted as well.

Related Topics

- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Understanding Configurable Matrices
- Understanding Market Pay
  These topics discuss:

Default Compensation Page

Use the Default Compensation page (JOBCD_COMP_RATE) to associate salary plan information and base pay rate codes with a job code.

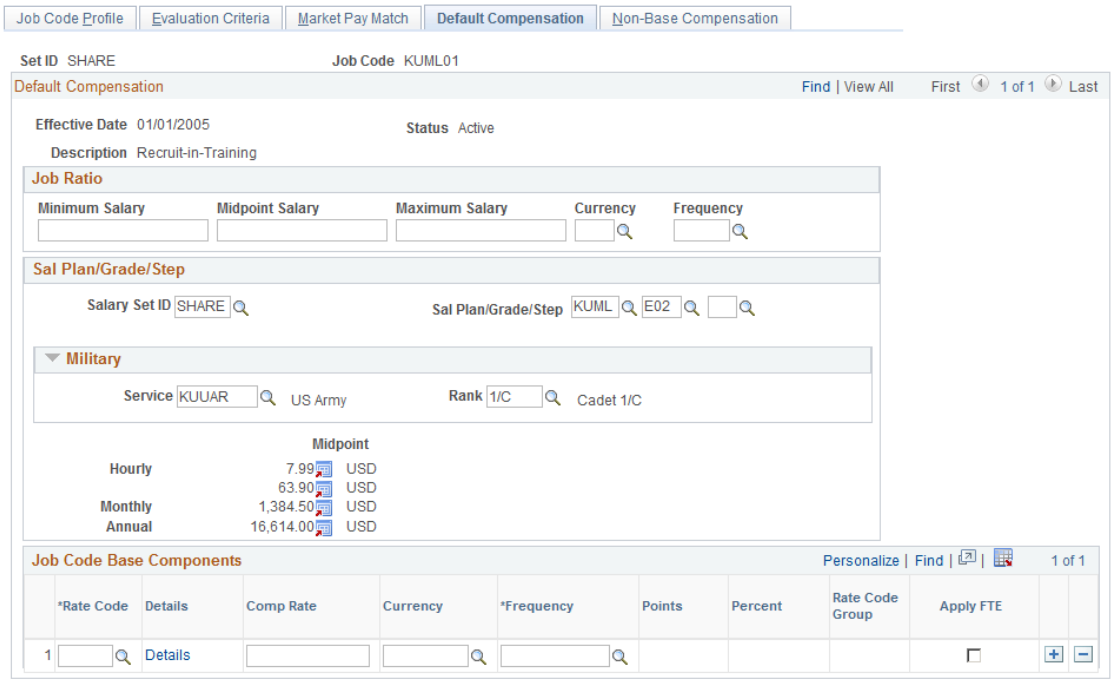
By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page.

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Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Define Job Code**, and then **Default Compensation**

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



By associating rate codes with job codes, you define default compensation packages that will be associated with a worker's job record on the Job Information page.

Job Ratio

The job ratio calculates comparative salary information for workers who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The worker's compensation rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

Field or Control	Description
Minimum Salary, Midpoint Salary, Maximum Salary, Currency, and **Frequency**	Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

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Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Field or Control	Description
Sal Plan/Grade/Step	Select a salary plan, grade and step. Note that all three fields are optional. If you do set defaults, the system populates the rest of the Salary Administration Plan fields on the page and the Salary Step Components grid with hourly, monthly, and annual midpoint pay rates that are associated with the grade. When you assign a worker to a job code on the Job Information page (JOB_DATA_JOBCODE), the system enters these values as a default on the Salary Plan page (JOB_DATA_SALPLAN). **Note:** If you have associated a salary plan with the location code assigned to the worker on the Work Location page (JOB_DATA1), the system will use the location salary plan as a default on the Salary Plan page instead of the job code salary plan. See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Tying Salary Plans to Job Codes, Locations, or Labor Agreements.

Military

Field or Control	Description
Service	Select the military service to which this job belongs. This becomes the military service default value in Manage Positions when you associate this job code to a position.
Rank	Select the military rank to which this job is classified. This becomes the military rank default value in Manage Positions when you associate the job code to a position.

Job Code Base Components

Select one or more rate codes that will make up default base compensation for this job code. The default values for compensation rate, currency, and frequency come from the Rate Code Definition page, but you can set different values if required.

> **Note**
>
> If a rate matrix is associated with the rate code, the compensation rate field will be unavailable. In this case, the rate will be set dynamically based on employee data when this rate code is added to the employee's compensation record.

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Field or Control	Description
Details	Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.
Frequency	The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page. See Understanding Frequency IDs.
Points	The system displays the points that are associated with this rate code, if applicable.
Percent	If the rate code 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.
Apply FTE (apply full-time equivalency)	Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.

> **Note**
>
> Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

Related Topics

- Application Fundamentals
- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Understanding the Base Compensation Budgeting and Planning Business Process

Non-Base Compensation Page

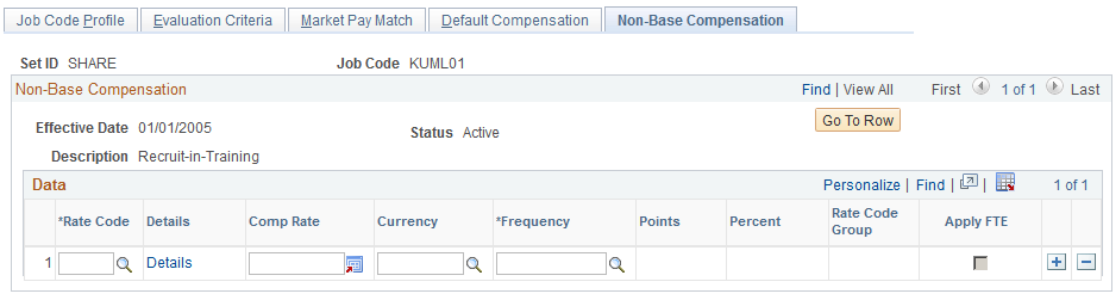
Use the Non-Base Compensation page (JOBCD_NON_BASE) to associate non-base rate codes with a job code.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Define Job Code**, and then **Non-Base Compensation**

This example illustrates the fields and controls on the Non-Base Compensation page. You can find definitions for the fields and controls later on this page.

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The system doesn't use non-base pay rate codes as default values on any HCM pages. The codes are used for payroll processing.

Defining Job Tasks

To define Setup Job Tasks use the Job Tasks component (JOB_TASK_TABLE) and Job Code Task Table component (JOBCODE_TASK_TABLE). Use the JOB_TASK_TABLE component interface to load data into the tables for this component.

These topics provide an overview of job tasks and discuss how to define job task codes.

Pages Used to Define Job Tasks

Page Name	Definition Name	Usage
Job Tasks Page	JOB_TASK_TABLE	Define job task outcomes. For example, if a job requires an worker to pick up heavy boxes and move them, then define moving heavy boxes as the essential job task. Because a worker with a disability could use a forklift to move them, do not define the job task as *lifting* heavy boxes.
Job Code Task Table Page	JOBCODE_TASK_TABLE	Associated job tasks with each job code.

Understanding Job Tasks

Define job task codes, such as *Data Entry,* and assign it to a Job Code on the Job Code Task Table. On the Job Code Task Table, indicate the importance and frequency of the task. You can use Manage Profiles to set up a profile for a job task.

Related Topics

- PeopleSoft Human Resources Manage Profiles: Understanding Managing Profiles

Job Code Task Table Page

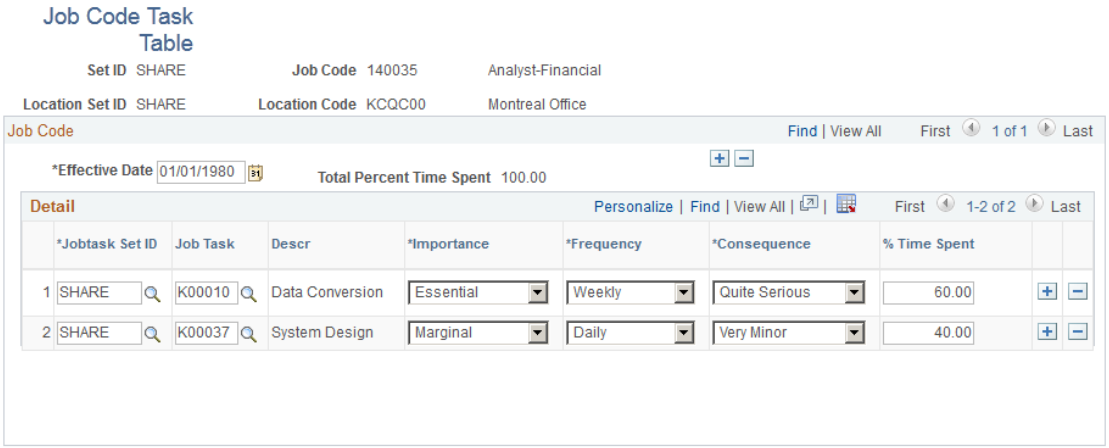
Use the Job Code Task Table page (JOBCODE_TASK_TABLE) to associated job tasks with each job code.

Navigation:

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Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Code Task Table**, and then **Job Code Task Table**

This example illustrates the fields and controls on the Job Code Task Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Total Percent Time Spent	The system calculates and displays this when you move out of the **% Time Spent** field. The total cannot exceed *100%*. **Note:** Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.
Jobtask Set ID	Select a job task set ID from the available options. Valid values are stored on the TableSet ID page.
Job Task	Select a job task from the available options. Valid values are stored on the Job Tasks page.
Imprtce (importance)	Select the importance of the job task to the particular job code. Valid values are in the Translate Table.
Freq (frequency)	Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.
Cons (consequence)	Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.
% Time Spnt (percentage time spent)	Enter the percentage of time that is spent on the job task.

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Setting Up Pay Groups

To set up pay groups, use the Pay Group Table component (PAYGROUP_TABLE).

These topics provide an overview of and how to set up pay groups.

Pages Used to Set Up Pay Groups

Page Name	Definition Name	Usage
Pay Group Table - Definition Page	PAYGROUP_TABLE1	Set up and describe pay groups.
Process Control Page	PAYGROUP_TABLE2	Establish employee type options for a particular pay group.
Pay Group Table - Calc Parameters Page	PAYGROUP_TABLE3	Define further payroll processing parameters for pay groups.
(USA) FLSA Period Definition Page	FLSA_PERIOD_SBPNL	(USA) Specify FLSA period definition and other parameters for the pay group's FLSA calculation.
(E&G) Education and Government Additional Earnings Codes Page	PAYGRP_TBL3_HP_SEC	(E&G) Add earnings codes for education and government.

Understanding Pay Groups

When implementing a payroll system for use with HCM, one of your major tasks is to set up pay groups. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While pay groups may seem specific to payroll processing, you also need this information for Human Resources, to set up job records and benefit programs. Many of the default field values on the Administer Workforce pages are based on the pay group values that you specify on the Pay Group Table component (PAYGROUP_TABLE). Set up at least one pay group for each company that you established in the Company component (COMPANY_TABLE) or the Agency USF component (AGENCY_TABLE) for U.S. federal users.

See Entering Company Information.

See (USF) Entering Agency Information.

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- PeopleSoft Payroll for North America.

  If you use PeopleSoft Payroll for North America, use the Pay Group table pages discussed in this topic as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Payroll for North America.*

  See PeopleSoft Payroll for North America: Understanding Pay Groups.

- PeopleSoft Payroll Interface

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If you use PeopleSoft Payroll Interface, use the Pay Group Table pages discussed in this topic as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Payroll Interface.*

See PeopleSoft Payroll Interface: Understanding Payroll Schedules.

- PeopleSoft Global Payroll.

  If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

  See PeopleSoft Global Payroll: Defining Pay Groups.

- Pay system other than a PeopleSoft payroll application.

  If you are not using a PeopleSoft payroll application, use the Pay Group table pages discussed in this topic.

- PeopleSoft Pension Administration.

  If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. Pension Administration doesn't use pay groups for paying pension benefits.

  See *PeopleSoft Pension Administration.*

> **Note**
>
> If you use more than one payroll application (for example, Payroll for North America and Global Payroll), set up the pay groups required for both applications. Otherwise, set up only the pay groups required for the application you are using. The company and pay group keys must be unique to the payroll application; do not use the same combination of keys for multiple payroll applications.

Using the Pay Group Table

The Pay Group Table component consists of nine pages. For Human Resources, enter information only on the first three pages of the component, because that information is used across all HCM applications. The last six pages in the component are used with Payroll for North America, and to a lesser extent, with Payroll Interface.

Pay Group Table - Definition Page

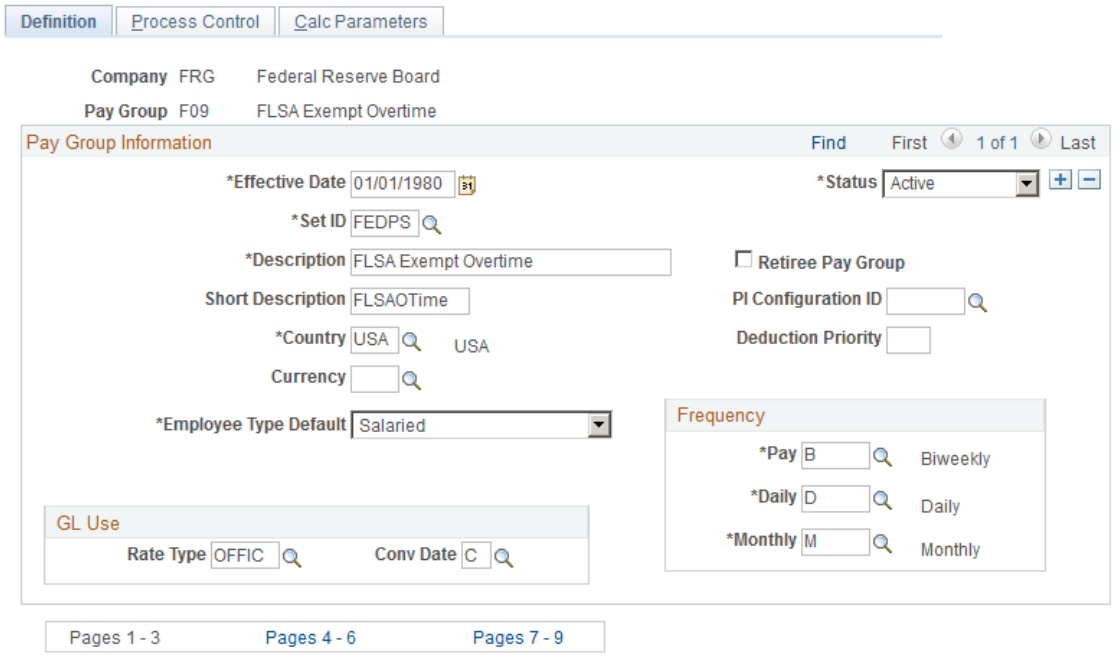
Use the Pay Group Table - Definition page (PAYGROUP_TABLE1) to set up and describe pay groups.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Group Table**, and then **Definition**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Group Table**, and then **Definition**

This example illustrates the fields and controls on the Pay Group Table - Definition page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Pay Group	The **Pay Group** value that you specified in the entry dialog box is displayed. **Note:** On employee job records, the Pay Group default is from the company level.
Set ID	Select a set ID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic set ID.
Retiree Pay Group	Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.
PI Configuration ID (Payroll Interface configuration ID)	Select, if appropriate. The PI Configuration ID is set up using the Configuration Table component (INTRFC_CONFIG) in Payroll Interface. You must set up that component first, or leave this field blank for now. **Note:** You *must* enter a value for Payroll Interface. If the PI Configuration ID is not set up correctly, payroll processing in Payroll Interface will not function properly. Refer to the *PeopleSoft Payroll Interface* for more information.
Deduction Priority	Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

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Field or Control	Description
Employee Type Default	Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit Program table. You need either to set up that table first or leave this field blank for now. Values are as follows: • *Salaried:* Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets. • *Hourly:* Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets. • *Exception Hourly* (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets. • *Not Applicable* (not applicable): Select if this field isn't applicable.
(CAN) Wage Loss Plan Default	Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency

Field or Control	Description
Pay	Select the pay period frequency. **Note:** If the employee's compensation rate on the Compensation page is quoted with the same frequency type as the pay period (for example a monthly frequency), you must use the same frequency ID (same annualization factor) for both the pay frequency and the compensation frequency.
Daily	Select the frequency used by Payroll for North America to calculate the daily pay rate. Only frequencies on the Frequency table with a frequency type of daily are available for selection.
Monthly	Select the frequency used by Payroll for North America to calculate a monthly pay rate. Only frequencies on the Frequency table with a frequency type of monthly are available for selection.

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GL Use

PeopleSoft General Ledger uses these fields.

Field or Control	Description
Rate Type	Select the appropriate value from the list provided.
Conv Date (conversion date)	Values are *Check Date, Pay End Date,* and *Today's Date.*

Related Topics

- PeopleSoft Payroll for North America: Setting Up Deductions
- Understanding Frequency in Payroll for North America
  These topics discuss:

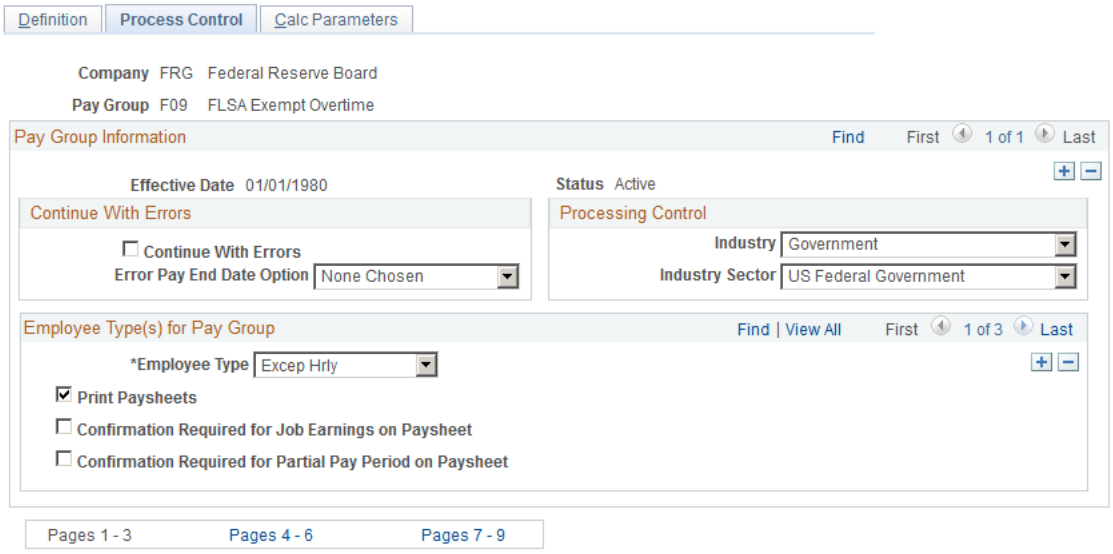
Process Control Page

Use the Process Control page (PAYGROUP_TABLE2) to establish employee type options for a particular pay group.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Group Table**, and then **Process Control**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Group Table**, and then **Process Control**

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



You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

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Continue With Errors

Field or Control	Description
Continue With Errors	Select to enable the Pay Confirmation process to proceed even if the Pay Calculation process encounters nonfatal calculation errors. The system moves the paysheets in error to a designated off-cycle calendar to be corrected in a separate off-cycle run. **Note:** All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on this page. If this condition is not met, the system cannot transfer any errored paysheets for the pay run ID.
Error Pay End Date Option	This value is used by the Pay Calendar build process to set up the pay calendar. Select the date of the off-cycle calendar to which erred paysheets are moved. If you select *Next Day,* the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st. **Note:** If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Field or Control	Description
Industry	Select your organization's primary business industry, such as *Core, Education, Government, Retail,* and so on.
Industry Sector	Select *None, Core, Public Sct* (public sector), or *US Federal.*

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Employee Type(s) for Pay Group

Field or Control	Description
Employee Type	Select the options—*Hourly*, *Exception Hourly*, or *Salaried*—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave **Print Paysheets** selected as the default. **Note:** If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.
Print Paysheets	If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is deselected still appear on the paysheet pages. **Note:** You must check this box if either of the confirmation required check boxes is selected.
Confirmation Required for Job Earnings on Paysheet	If you are using PeopleSoft Payroll for North America, select this box to deselect the **OK to Pay** field on the paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected. Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid. For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

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Field or Control	Description
Confirmation Required for Partial Pay Period on Paysheet	If you are using PeopleSoft Payroll for North America, select this box to control the **OK to Pay** check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should deselect this check box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

Related Topics

- PeopleSoft Payroll for North America: Understanding Paysheets and Paylines

Pay Group Table - Calc Parameters Page

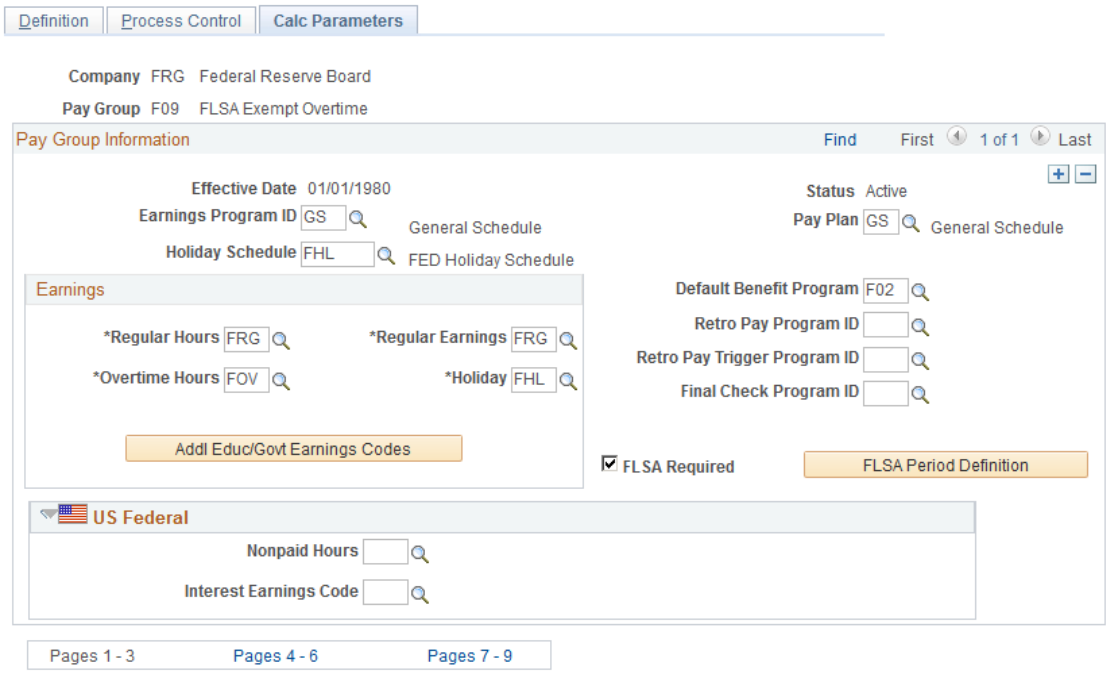
Use the Calc Parameters page (PAYGROUP_TABLE3) to define further payroll processing parameters for pay groups.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Group Table**, and then **Calc Parameters**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Group Table**, and then **Calc Parameters**

This example illustrates the fields and controls on the Pay Group Table - Calc Parameters page. You can find definitions for the fields and controls later on this page.

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Pay Group Information

Field or Control	Description
Earnings Program ID	Select a default value for the employee records in this pay group. Earnings Program IDs are set up using the Earnings Program Table component (EARNS_PROGRAM_TBL) in either Payroll for North American or Payroll Interface. You must set up that component first or leave this field blank for now.
Pay Plan	(USF) Select the pay plan to assign to this pay group.
Holiday Schedule	Select the holiday schedule for the pay group. If you left the Holiday Schedule field blank on the Location Profile page, the system uses the holiday schedule you specify on this page as the default for the worker's job record. You must set up the Holiday Schedule table before making a selection or leave this field blank for now. **Note:** In Payroll Interface, if you want the third-party payroll system to process holiday pay, on the Holiday Schedule component set up a holiday schedule called NONE.
Default Benefit Program	Select the default benefit/deduction program for the pay group. The system uses this default benefit/deduction program as the default for the employee's job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Benefits menu. You must set up that table first, or leave this field blank for now.

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Field or Control	Description
Retro Pay Program ID	Select a retro pay program to associate with the pay group. The retro pay program identifies the earnings codes used in retro pay calculations. In each retro pay program, you list earnings codes that are eligible for retro pay, and for each of these earnings codes, you specify the earnings code to be used for paying the retro pay earnings. You define retro pay programs in the Retro Pay Program component. See PeopleSoft Payroll for North America: Program Table Page.
Retro Pay Trigger Program ID	Select a retro pay trigger program to associate with the pay group. The retro pay trigger program controls which record and field changes (on the job record and the additional pay data record) create retro pay requests. The retro pay calculation process then processes these requests to determine how much, if any, retro pay is to be paid because of the changes. You define retro pay trigger programs in the Retro Pay Trigger Program component. See PeopleSoft Payroll for North America: Retro Pay Trigger Program Page. **Note:** Releases before PeopleSoft Payroll for North America 9.1 generated retro requests using PeopleCode rather than retro pay trigger programs. When you upgrade from one of these earlier releases, use correction mode to enter retro pay trigger programs for the current and history rows on this page. You cannot save changes to this component if there are any rows that have a retro pay program but no retro pay trigger program.
Final Check Program ID	To specify a default final check program for the pay group, select the final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

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Field or Control	Description
FLSA Required	(USA) Select this check box if FLSA regulations are to be applied to this pay group. When you select this check box, the *FLSA Period Definition* button appears. If you do not select this check box, the button does not appear and you cannot define FLSA pay periods. FLSA is for U.S. Payroll only; this check box appears on the page if you have enabled FLSA processing on the FICA/Tax Details page (access through the Company Table – Default Settings page) and on every pay group when applicable. **Note:** If FLSA is not selected for a company, it cannot be selected for a pay group within that company. After it has been selected at the company level, it does not have to be selected at the pay group level. However, if FLSA is required for a pay group, it must be selected at both the company and pay group levels. **Note:** (USF) If FLSA is required for a whole agency or for most pay groups in an agency, you should deselect the **FLSA Required** check box and define FLSA requirements on the Agency Table. Remember that if the *FLSA Required* check box isn't selected on the Agency Table, the FLSA Rule for a pay group is set by default to *Higher of FLSA Contractual*. **Note:** To be included in FLSA calculation, an employee must have non-exempt status and belong to an FLSA pay group. **Note:** When setting up pay groups, do not use the same pay group ID in two separate companies if the companies use different overtime earnings codes for FLSA.
FLSA Period Definition	(USA) Click to access the FLSA Period Definition page.

Earnings

Use this group box to define earnings codes for each earnings type.

Field or Control	Description
Regular Hours	Select the appropriate earnings code for the regular hours earnings type.
Overtime Hours (overtime hours earnings type)	Select the appropriate earnings code for the overtime hours earnings type.
Regular Earnings	Select the appropriate earnings code for the regular earnings type.

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Field or Control	Description
Holiday	When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with this field. If Holiday Type on the Holiday Schedule Table is Canadian, the system uses this earnings code to set up the statutory holiday earnings on the paysheet. **Note:** (USF) The system does not enter the holiday earnings code on the paysheet if the employee is in a nonpay status for the entire pay period.
Refund	Enter the earnings code used to refund money to employees who cancel U.S. Savings Bond elections or whose purchases are suspended due to the annual purchase limit. **Note:** The refund earnings code must be configured appropriately. On the Earnings Table - Taxes page, the Add to Gross and Maintain Earnings Balances check boxes must be selected, and the earnings code must not be subject to any taxes. See PeopleSoft Payroll for North America: Earnings Table - Taxes Page.

(USF) US Federal

Specify additional earnings codes.

Field or Control	Description
Nonpay Hours	Enter the earnings code to be entered on the paysheets when the system detects that an employee is on leave without pay or short or long-term disability for an entire pay period. **Note:** Nonpay hours are included on paysheets only if the employee is in nonpay status for the entire pay period.
Interest Earnings Code	Enter the earnings code used to pay interest on retroactive payments that are over 30 calendar days late. See PeopleSoft Payroll for North America: (USF) Managing Interest Calculations on Retro Pay.

Related Topics

- Setting Up Holiday Schedules
  To set up holiday schedules, use the Holiday Schedule (HOLIDAY_SCHED_TBL) component.
- PeopleSoft Payroll for North America: Setting Up Retro Pay Processing

(USA) FLSA Period Definition Page

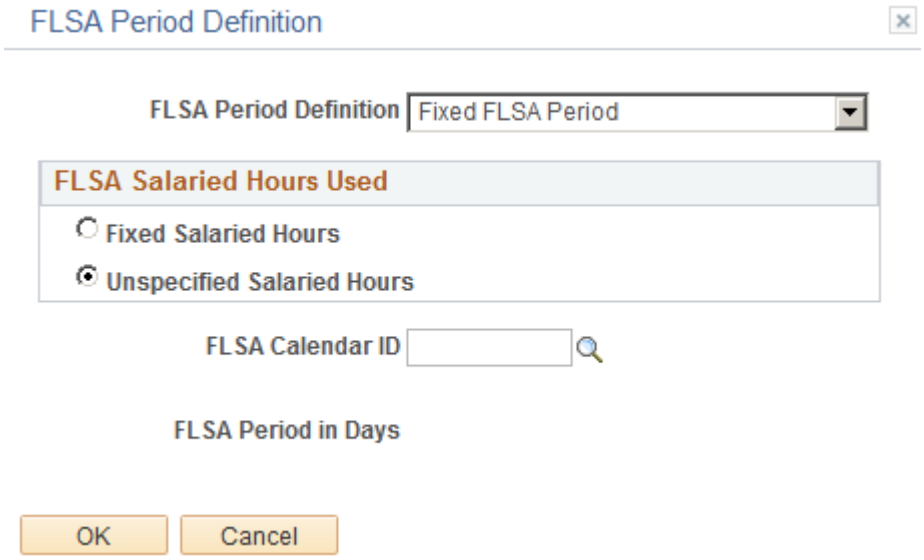
Use the FLSA Period Definition page (FLSA_PERIOD_SBPNL) to specify FLSA period definition and other parameters for the pay group's FLSA calculation.

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Navigation:

Click **FLSA Period Definition** on the Calc Parameters page.

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



The FLSA Period Definition page changes, depending on which options you select. The following table shows which fields are visible on the page, depending on the FLSA Period Definition you select:

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X	X	X	
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula selected	X	X			
Fixed FLSA Period with Unspecified Salaried Hrs selected	X		X	X	
Law Enforcement			*X*	X	X

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FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Fire Protection			X	X	X

Field or Control	Description
FLSA Period Definition	Select the appropriate FLSA period definition: • *Fixed FLSA Period:* 7 or 14 days. 7 is the default. • *Fire Protection:* 7 to 28 days. • *Law Enforcement:* 7 to 28 days. • User-defined FLSA period definitions are also available in the list. If you select *Fixed FLSA Period,* the period can only be for 7 or 14 days. There are no FLSA Threshold Hours for employees in the *Fixed FLSA Period,* because threshold hours only apply to law enforcement and fire protection employees.

FLSA Salaried Hours Used

Field or Control	Description
Fixed Salaried Hours	Select this option to use the standard hours you entered on the employee's Job record. If you select this option, the *Use Basic Formula* check box appears.
Use Basic Formula	If you select this check box, the *FLSA Calendar ID* and *FLSA Period in Days* check boxes disappear. Basic formulas are used only for monthly and semi-monthly pay periods. The FLSA period is assumed to be the same as the Pay Calendar period; hence, no FLSA Calendar ID is required. If you select this check box, you must enter information into the Work Day Hours field on the Job Information page.
Unspecified Salaried Hours	Select this option to use the actual number of hours worked per week by salaried employees to determine their FLSA rate.
FLSA Calendar ID	Select a FLSA calendar ID. The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA Calendar ID to define the FLSA periods. This field is not applicable if you select *Basic Rate Formula.* If you select *Fixed FLSA Period,* the prompt list contains only FLSA Calendar IDs with 7 or 14 FLSA Periods in Days. For Fire Protection or Law Enforcement, the prompt list contains FLSA Calendar IDs from 7 to 28 days.

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Field or Control	Description
FLSA Period in Days	The length of the FLSA pay period, or the days from the FLSA Begin Date to the FLSA End Date. The system displays it automatically. It is based on the FLSA Period in Days you define on the FLSA Calendar Table. This field is display-only.
FLSA Threshold Hours	The number of hours worked before the FLSA rate applies to Fire Protection and Law Enforcement employees. Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in the FLSA Period Table. You can create user-defined FLSA period definitions with different threshold hour schedules if necessary. See PeopleSoft Payroll for North America: Overview of FLSA Calculations and PeopleSoft Payroll for North America: Multiplication Factors in FLSA Calculations.

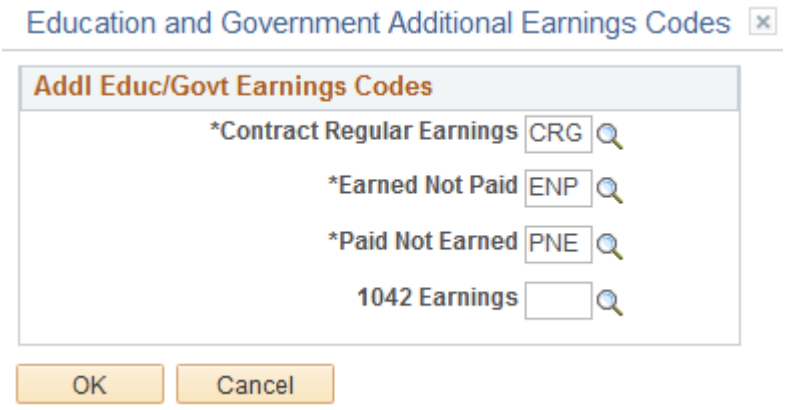
(E&G) Education and Government Additional Earnings Codes Page

Use the Education and Government Additional Earnings Codes page (PAYGRP_TBL3_HP_SEC) to add earnings codes for education and government.

Navigation:

Click **Addl Educ/Govt Earnings Codes** on the Calc Parameters page

This example illustrates the fields and controls on the Education and Government Additional Earnings Codes page. You can find definitions for the fields and controls later on this page.



Select the appropriate earnings code for each field.

Running Job Code and Pay Group Reports

To run job code and pay group reports, use the Job Code Table Report component (RUN_PER_709C) and Pay Group component (RUN_PAY711).

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This topic lists the page used to run job code and pay group reports.

Page Used to Run Job Code and Pay Group Reports

Page Name	Definition Name	Usage
Job Code Table Report - Run Control Page	PRCSRUNCNTL	Run the Job Code Table report (PER709C), which lists all job codes.
Pay Group Report Page	PRCSRUNCNTL	Run the Pay Group report (PAY711), which prints each pay group and the processing characteristics that apply to that group.

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16

(USF) Setting Up Human Resources Management Tables

Setting Up Federal HCM Control Tables

To set up federal HCM control tables, use the Handicap Table component (GVT_HANDICAP_TBL), Legal Authority component (GVT_LEGAL_AUTH_TBL), U.S. County Table component (GVT_COUNTY_TABLE), Nature of Actions USF component (GVT_NOAC_TBL), LEO Pay Area USF component (GVT_LEOPAY_AREA_TB), NOA/Legal Authority component (GVT_AUTH_VAL_1), Sub Agency component (GVT_SUB_AGENCY_TBL), Personnel Office ID component (GVT_POI_TABLE), and Personnel Action Rqst Rmks component (GVT_SF50_RMK_TBL).

These topics provide an overview of and discuss how to set up federal HCM control tables.

Pages Used to Set Up Federal HCM Control Tables

Page Name	Definition Name	Usage
Handicap Table Page	GVT_HANDICAP_TBL	Assign codes to the types of disabilities a person might have. You can set up the table with the disabilities that your agency is likely to use and add more as needed.
Legal Authority Page	GVT_LEGAL_AUTH_TBL	The Legal Authority table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.
U.S. County Table Page	GVT_COUNTY_TABLE	View a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.
Nature of Actions USF Page	GVT_NOAC_TBL	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources.

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Page Name	Definition Name	Usage
Law Enforcement Officers Pay Area Table Page	GVT_LEOAREA_TABLE	Set up special pay areas in the Law Enforcement Officers Pay Area Table. Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.
NOA/Legal Authority 1 Page	GVT_AUTH_VAL_1	Connect the NOA codes that are defined in the Nature of Actions USF with the legal authorities that are defined in the Legal Authority table. You must have set up nature of action codes and legal authority codes.
Sub-Agency Page	GVT_SUBAGCY_TABLE	Set up sub-agencies if your agency has multiple organizations that report to OPM as separate entities.
Personnel Office ID Table Page	GVT_POI_TABLE1	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the personnel action requests.
PAR Approving Officials Table Page	GVT_POI_TABLE2	Enter the names that appear in the routing process section of the PAR.
Personnel Action Rqst Rmks Page	GVT_SF50_RK_TBL	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert person-specific information into other remarks when you attach the remark at the person level.

Understanding Federal HCM Control Tables

This topic discusses the set up of control tables that are specific to federal agencies.

When creating personnel action requests, you search fields using information from the Legal Authority table, the Nature of Actions USF, the PAR Remarks table, and the NOA/Legal Authority 1 table.

When you enter employee-specific information, you use values from the Handicap table and the LEO Pay Area table.

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In PeopleSoft HCM, you use values from the U.S. County table, the Personnel Office ID table, and the Sub-Agency table.

Handicap Table Page

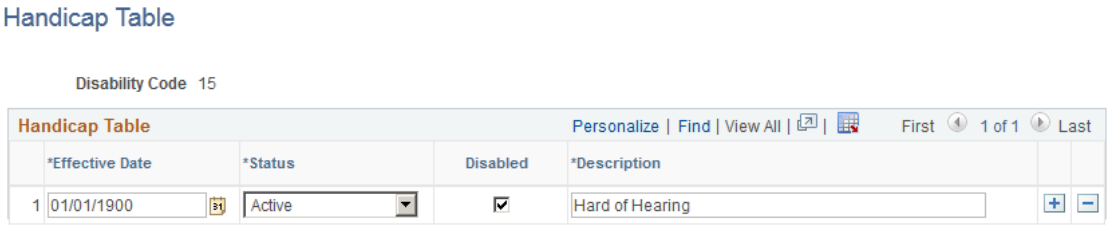
Use the Handicap Table page (GVT_HANDICAP_TBL) to assign codes to the types of disabilities a person might have.

You can set up the table with the disabilities that your agency is likely to use and add more as needed.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Handicap Tables USF**, and then **Handicap Tables USF**

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



Field or Control	Description
Disabled	Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a disability code to indicate that a person has no disability, leave this check box deselected.

Legal Authority Page

Use the Legal Authority page (GVT_LEGAL_AUTH_TBL) to the Legal Authority table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Define Legal Authority**, and then **Define Legal Authority**

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

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A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority table.

Field or Control	Description
Effective Date	When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.
Description - Part 1 and **Description - Part 2**	Enter descriptions that appear on the Data Control page (GVT_JOB0) when you process personnel actions for a person.

Nature of Actions USF Page

Use the Nature of Actions USF page (GVT_NOAC_TBL) to review, add, and update codes.

This table defines the Nature of Action codes that are used in PeopleSoft Human Resources.

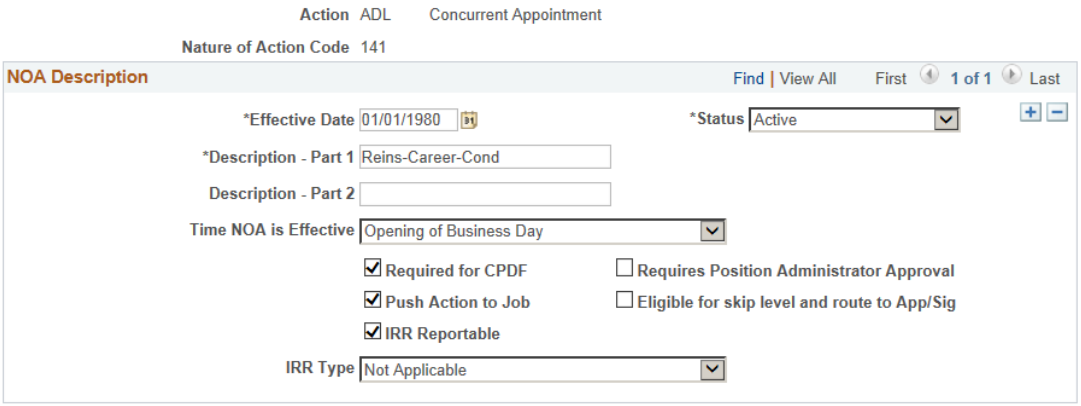
Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Nature of Actions USF** , and then **Nature of Actions USF**

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

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Nature of Action Table



Field or Control	Description
Nature of Action Code	Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code. PeopleSoft delivers the NOA codes, but you can add or update entries as needed. The first digit of the nature of action code specifies the action type. • 100 series — appointments • 200 series — returns to duty from nonpay status • 300 series — separations • 400 series — placements in nonpay or nonduty status • 500 series — conversions to appointment • 600 series — (reserved for Office of Personnel Management use) • 700 series — position changes, extensions, and miscellaneous changes • 800 series — pay changes and miscellaneous changes • 900 series — (reserved for use by agencies) When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series. Use the 900 series of numbers to document personnel matters relevant to your agency that are not required by Standard Form 50. The second and third digits specifies the particular action, such as a promotion or resignation.
Effective Date	When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time for the NOA code.

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Field or Control	Description
Time NOA is Effective (time nature of action is effective)	This field designates when the personnel action should take effect. Select *Opening of Business Day* (the default) or *Close of Business Day.* If you select *(none),* the system uses the default, *Opening of Business Day.* In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With *Termination/Non-Pay* actions (NOAs that are in the 300 series and 400 series), the action is effective at *Close Of Business Day* on the effective date. Any personnel action defined with *Close of Business Day* increments the Job effective date by one. The Federal (GVT_JOB) effective date is not affected.
Required for CPDF (required for central personnel data file)	Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.
Push Action to Job	Select if the nature of action is to be applied to the core PeopleSoft job record (JOB) from the federal government side after saving the personnel action.
IRR Reportable (individual retirement record reportable)	Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.
IRR Type	Select the type of IRR to be generated. Values are *Retirement, Transfer/Resignation,* and *Supplemental.*
Requires Position Administrator Approval	Enable the check box in case a particular nature of cation code requires position administrator to be incorporated in the approval chain and make updates to position data.
Eligible for skip level and route to APP/Sig	Select if the specific action request needs to be routed directly to the approve and sign authority. This allows to skip the first authorization and second authorization level.

Law Enforcement Officers Pay Area Table Page

Use the Law Enforcement Officers Pay Area Table page (GVT_LEOAREA_TABLE) to set up special pay areas in the Law Enforcement Officers Pay Area Table.

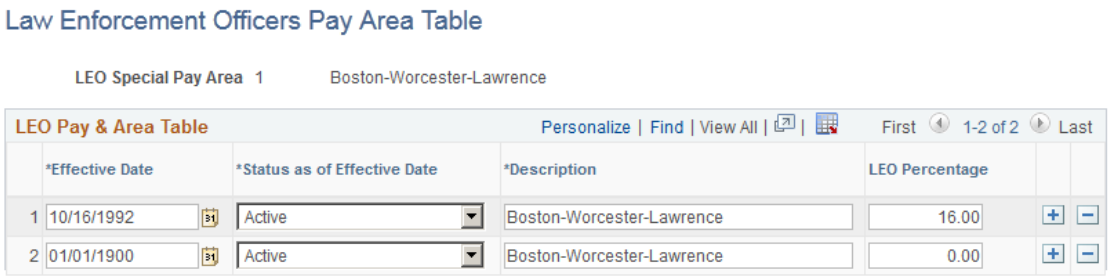
Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **LEO Pay Area Table USF**, and then **Law Enforcement Officers Pay Area Table**

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This example illustrates the fields and controls on the Law Enforcement Officers Pay Area Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
LEO Percentage (law enforcement officer percentage)	Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page (JOB_DATA3) in Administer Workforce.

NOA/Legal Authority 1 Page

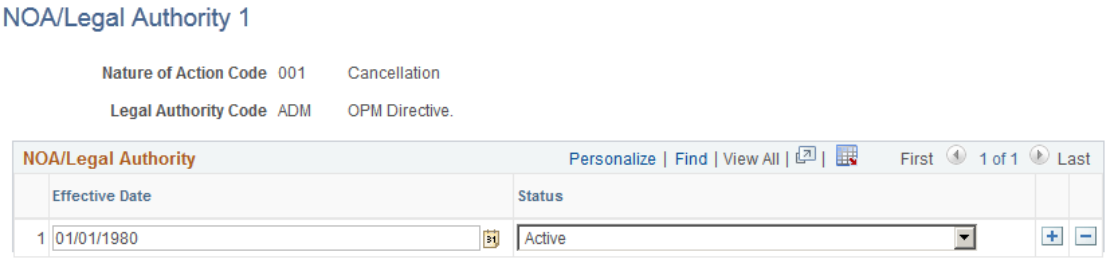
Use the NOA/Legal Authority 1 page (GVT_AUTH_VAL_1) to connect the NOA codes that are defined in the Nature of Actions USF with the legal authorities that are defined in the Legal Authority table.

You must have set up nature of action codes and legal authority codes.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **NOA/Legal Authority 1**, and then **NOA/Legal Authority 1**

This example illustrates the fields and controls on the NOA/Legal Authority 1 page. You can find definitions for the fields and controls later on this page.



When you enter an NOA (nature of action) code on the PAR Data Control page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority table.

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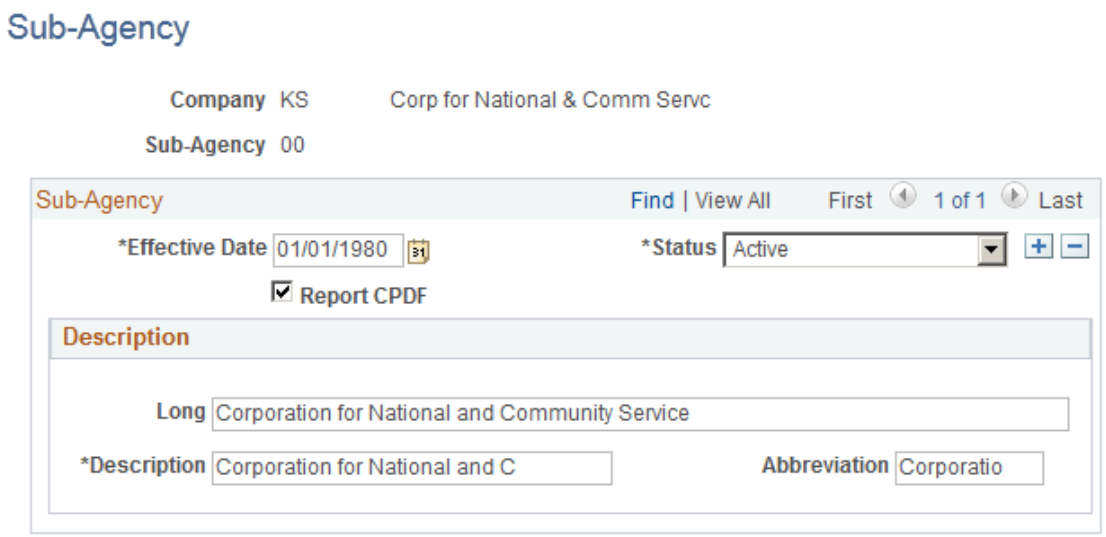
Sub-Agency Page

Use the Sub-Agency page (GVT_SUBAGCY_TABLE) to set up sub-agencies if your agency has multiple organizations that report to OPM as separate entities.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Define Subagency** , and then **Define Subagency**

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



Field or Control	Description
Sub-Agency	If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.
Report CPDF (report central personnel data files)	Select if this sub-agency reports CPDF on a regular basis.
Long	Enter a long description of the sub-agency.
Abbreviation	Enter an abbreviated description of the sub-agency.

Personnel Office ID Table Page

Use the Personnel Office ID Table page (GVT_POI_TABLE1) to assign an identification number to every personnel office in your agency.

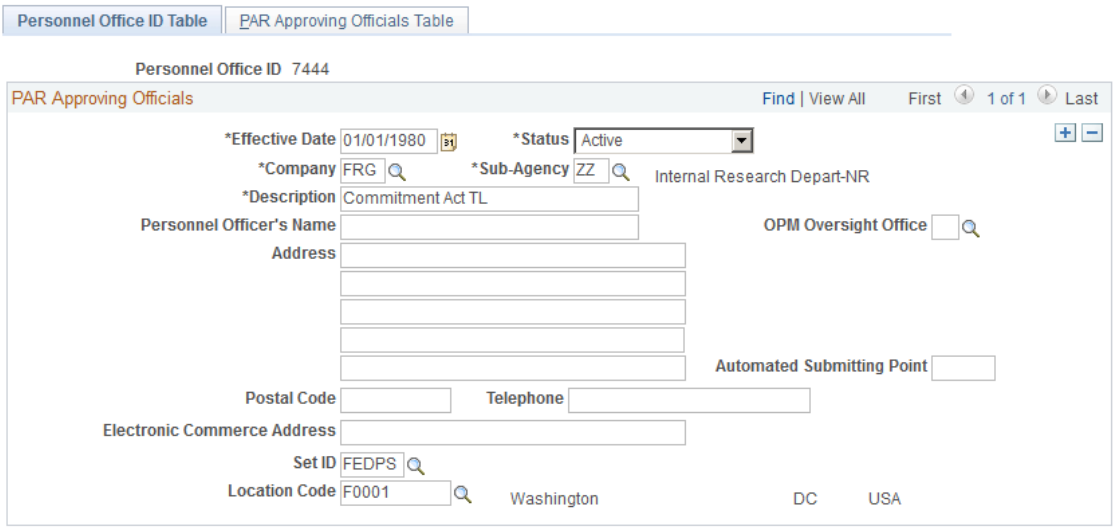
Much of the information that you enter is printed on the personnel action requests.

Navigation:

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Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Personnel Office ID**, and then **Personnel Office ID Table**

This example illustrates the fields and controls on the Personnel Office ID Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Sub-Agency	Select the sub-agency code.
Personnel Officer's Name	Enter the name of the person who is responsible for personnel actions for this office.
OPM Oversight Office (office of personnel management oversight office)	Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.
Automated Submitting Point	The automated submitting point is an informational field and isn't used during PeopleSoft HCM processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.
Electronic Commerce Address	This address is for your agency's information only. For example, this might be an email address or a government network ID.

PAR Approving Officials Table Page

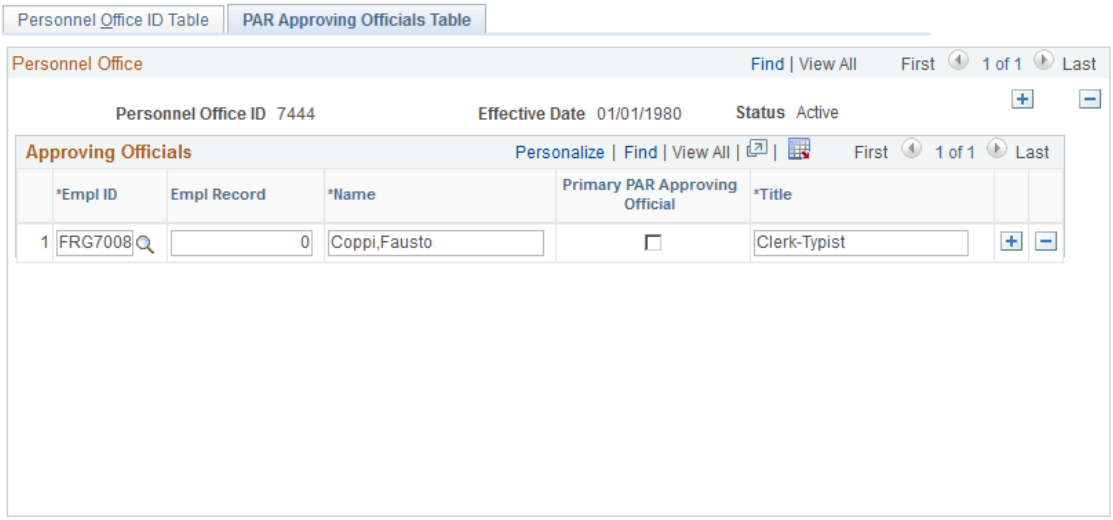
Use the PAR Approving Officials Table page (GVT_POI_TABLE2) to enter the names that appear in the routing process section of the PAR.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Personnel Office ID**, and then **PAR Approving Officials Table**

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This example illustrates the fields and controls on the PAR Approving Officials Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Empl ID (employee ID)	Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the **Empl Record, Name,** and **Title** fields. You can edit these fields.
Primary PAR Approving Official (primary personnel action request approving official)	Select if applicable. This check box is for your information only.

Personnel Action Rqst Rmks Page

Use the Personnel Action Rqst Rmks page (GVT_SF50_RK_TBL) to define standardized remarks to attach to PARs.

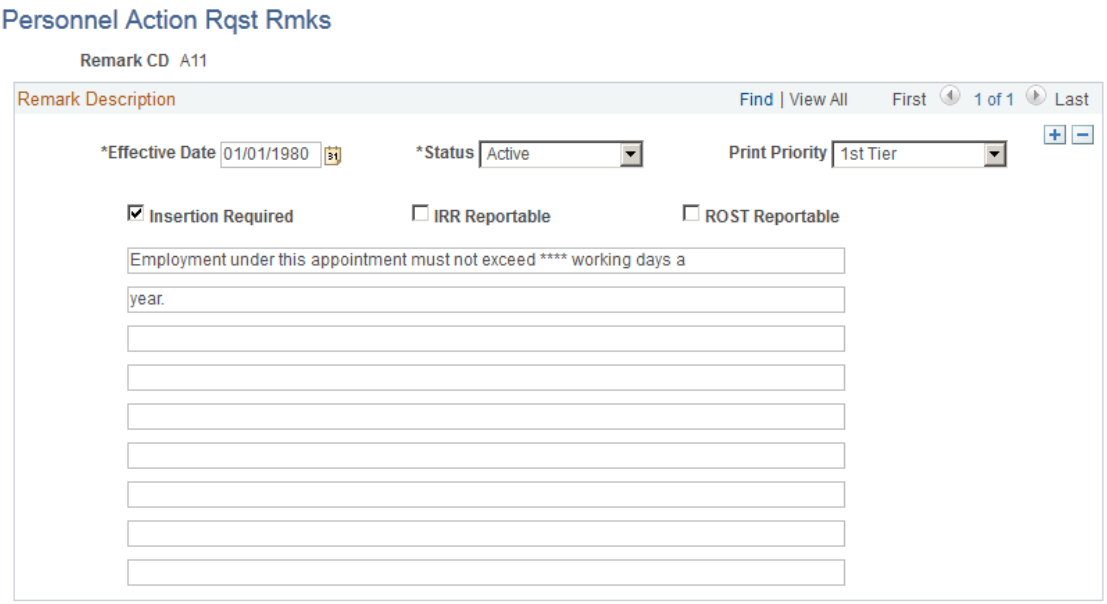
You use some remarks exactly as they are entered here, but you insert person-specific information into other remarks when you attach the remark at the person level.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **PAR Remarks** , and then **PAR Remarks**

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

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The Office of Personnel Management (OPM) designates remark codes that begin with *A* through *X*. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with *Y* or *Z*. When you upgrade PeopleSoft HCM, retain your agency-specific remarks.

Field or Control	Description
Print Priority	Select the printing priority for the remark. Available values are *1st Tier* and *2nd Tier*. First tier remarks print first on the SF50/52 reports before any second-tier remarks. Therefore, any remark that is defined as *1st Tier* is printed in the order it is listed by the HR personnel. These are followed by the 2nd tier remarks.
Insertion Required	Select if this remark needs employee-specific information. When you select this remark at the person level, this check box is unavailable for entry. PeopleSoft uses an asterisk (*) to denote person-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the person level.
IRR Reportable (individual retirement record reportable)	Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.
ROST Reportable (Register of Separations and Transfers reportable)	Select to have this remark printed on the ROST.

Related Topics

- PeopleSoft Payroll for North America: Understanding the IRR Process

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Running Federal HCM Setup Reports

This topic lists the pages used to run the federal HCM setup reports.

Pages Used to Run the Federal HCM Setup Reports

Page Name	Definition Name	Usage
Run Control Page	PRCSRUNCNTL	Run the Federal HCM setup reports. • Handicap Table report (FGPER811) prints all disabilities and their associated codes. • Legal Authority Table report (FGPER812) prints information about the legal authorities you set up in the Legal Authority table. • Nature of Action Table report (FGPER813) generates a list of the codes in the Nature of Action Table. • Law Enforcement Officers Pay Area Table report (FGPER808) lists each LEO Special Pay Area and associated percentage. • NOA Authority 1 report (FGPER814) generates a list of the information in the Nature of Action/Authority 1 Table. • Personnel Office ID Table report (FGPER805) prints information about all Personnel Offices in your agency. • Sub-Agency report (FGPER804) prints all sub-agencies in the Sub-Agency and their associated agencies.

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Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages.

PC Business Unit Table

The PC Business Unit table is part of the Project Costing process in PeopleSoft Financials, which interacts with the Time and Labor process. If you don't use project costing, you don't need to import the values for this table.

See PeopleSoft Time and Labor.

GL Business Unit Table

The GL Business Unit table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don't need to import the values for this table.

See *PeopleSoft General Ledger.*

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17

Setting Up Banks and Bank Branches

Understanding Bank and Bank Branch Setup

These topics discuss:

- Banking setup.
- (GBR) Bank and building society setup in the UK.
- The CI_BANK_EC component interface.

Banking Setup

To set up banks in HCM:

1. Set up bank information on the Bank Table page (BANK_EC).
2. Specify bank branch information on the Branch Table page (BANK_BRANCH_EC).

   > **Note**
   >
   > There is some additional banking setup required for the UK.

   See (GBR) Bank and Building Society Setup in the UK.
3. Specify source banks for payroll processing on the Source Bank Accounts page.

(GBR) Bank and Building Society Setup in the UK

This topic discusses how to set up the pages in the Bank/Branch component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

See PeopleSoft Human Resources Administer Workforce: Entering Bank Account Information.

You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your payee's bank and building society accounts.

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society. Use the Branch Table page and its associated Building Society Address page, to enter the building society details. This table shows how to complete these pages:

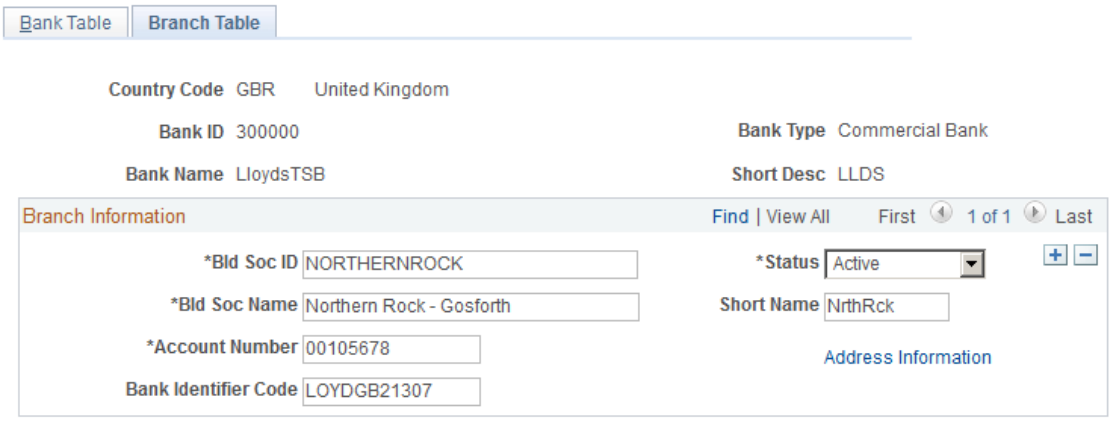
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Type of Account	Bank Table Page	Branch Table Page and Building Society Address Page
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning

You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

This example shows how a building society is defined on the Branch Table page:



In the example, the building society is linked to LloydsTSB bank (bank ID 30000) that handles clearing for the building society. The building society's clearing account is shown in the Account Number field.

The CI_BANK_EC Component Interface

Because there may be a large volume of bank information to set up, you can simplify the process by importing bank information from a Microsoft Excel spreadsheet into the bank setup tables with the use of the CI_BANK_EC component interface that PeopleSoft provides.

You download bank information from a website or service that provides bank information to an Excel spreadsheet and then import the information from the Excel spreadsheet to the CI_BANK_EC component interface, using the Excel to Component Interface utility. The CI_BANK_EC component interface loads the bank information into the BANK_EC table and BANK_BRANCH_TBL in PeopleSoft HCM.

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> **Note**
>
> It is your responsibility to determine which rows to update and which rows to add to the PeopleSoft HCM database when using the Excel to Component Interface utility.

Related Topics

- Enterprise Components

Setting Up Banks and Bank Branches

To set up banks, use the Bank component (BANK_EC). To set up bank branches, use the Bank Branch component (BANK_BRANCH_TBL).

Use the CI_BANK_EC component interface to load the banking data into the tables for this component interface.

See *PeopleSoft: Enterprise Components.*

These topics discuss how to set up banks and bank branches.

Pages Used to Set Up Banks and Bank Branches

Page Name	Definition Name	Usage
Bank Table Page	BANK_EC	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table Page	BANK_BRANCH_EC	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Address Page	BANK_BRA_ADR_SP	Enter the address for a bank branch.
(BRA) Bank Branch Brazil Page	BANKBRANCH_BRA_SEC	Enter additional information for Brazilian bank branches.

Bank Table Page

Use the Bank Table page (BANK_EC) to set up basic information for all financial institutions.

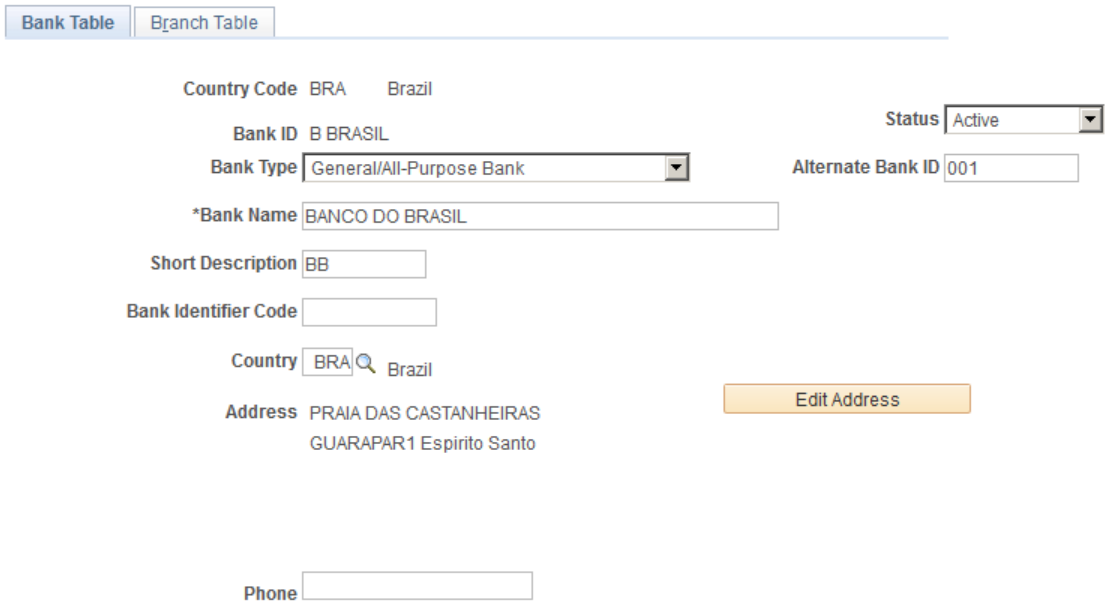
You must complete the Bank Table page before you identify a bank with a source bank account.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Banking**, and then **Banks**, and then **Bank Table**

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

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Field or Control	Description
Bank ID	System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.
Bank Type	Select the type of bank. Values are *Commercial, Community, General, Post Bank,* and *Savings.*
Alternate Bank ID	Enter the bank's national ID, if applicable. If the bank participates in an international banking consortium or system, it is given an alternate bank ID that is used in international transactions.
Bank Name	Enter the name of the bank.
Bank Identifier Code	Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.
Country	Select the country where the bank is located.
Address	The bank's address is displayed.
Edit Address	Click the **Edit Address** link to change address information for a bank.
Phone	Enter the phone number for the bank.
AC Bank Name (alternate character bank name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.

(GBR) Special Considerations for the UK

To set up UK bank branches, enter the following information:

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Field or Control	Description
Country Code	Enter *GBR*.
Bank ID	Enter the sort code for the bank branch. **Note:** If you're setting up a building society, enter the sort code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.
Bank Type	Optional for UK banks.
Alternate Bank ID	Leave blank for UK banks.
Bank Name	Enter a description of the branch. Include the location of the branch, not just the bank name.

Branch Table Page

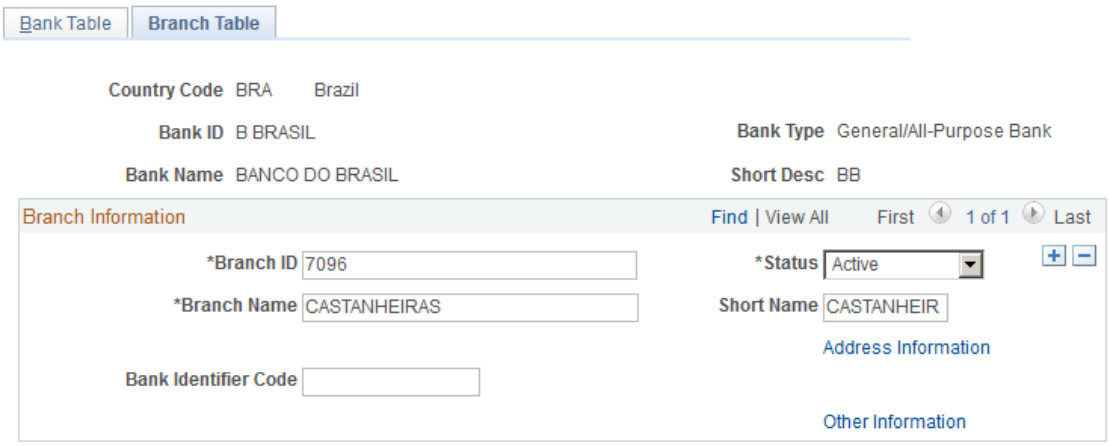
Use the Branch Table page (BANK_BRANCH_EC) to define a bank's branches.

Not all countries require bank branch information.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Banking**, and then **Banks**, and then **Branch Table**

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



Field or Control	Description
Branch ID	Enter the branch ID for the bank. Branch ID formats vary by country.
Branch Name	Enter the name of the bank branch.

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Field or Control	Description
Bank Identifier Code	Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.
AC Branch Name (alternate character branch name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.
Address Information	Click the **Address Information** link to access the Bank Branch Address page.
Other Information	(BRA) Click the **Other Information** link to access the Bank Branch Brazil page.

(GBR) Special Considerations for the UK

To set up UK building societies, enter the following information on the Branch Table page:

Field or Control	Description
Bld Soc ID (building society ID)	Enter a unique identifier for the building society.
Status	You can enter employee account details only for building societies with an active status.
Bld Soc Name (building society name)	Enter the full name of the building society.
Account Number	Enter the number of the building society's account at the clearing bank.
Address Information	Click the **Address Information** link to access the Building Society Address page, where you enter the building society's head office address.

(BRA) Bank Branch Brazil Page

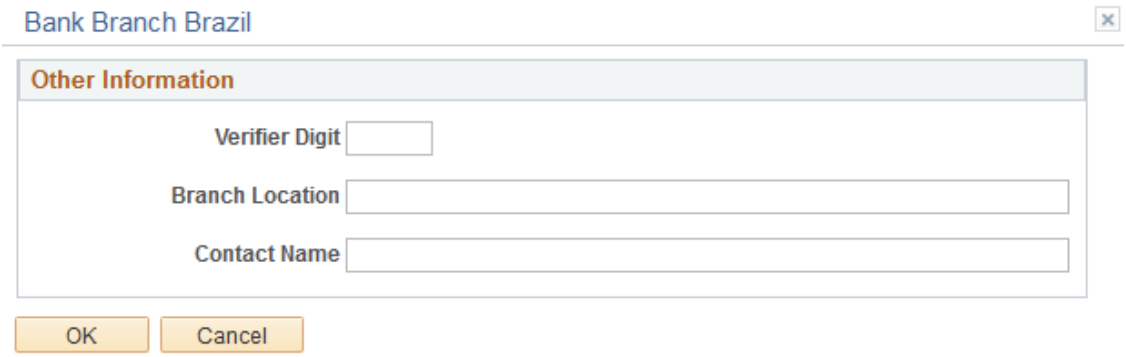
Use the Bank Branch Brazil page (BANKBRANCH_BRA_SEC) to enter additional information for Brazilian bank branches.

Navigation:

Click the **Other Information** link for a Brazilian bank on the Branch Table page.

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

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Field or Control	Description
Verifier Digit	Enter the bank-assigned verifier digit. File transfers may require the verifier digit.
Branch Location	Enter the bank branch location.
Contact Name	Enter the contact name for the bank branch.

Setting Up IBAN Information

To set up IBAN Information, use the IBAN Country Setup (SETUP_IBAN_TBL) component.

These topics provide an overview of IBAN setup and discuss how to set up IBAN information.

Page Used to Set Up IBAN Information

Page Name	Definition Name	Usage
IBAN Country Setup Page	SETUP_IBAN_TBL	Enable the IBAN feature for a specific country. Create BBAN validation rules.

Understanding IBAN Setup

The International Bank Account Number (IBAN) is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders. PeopleSoft applications can include this information at the bank account level.

To set up IBAN functionality you must select the **IBAN enabled** field on the IBAN Country Setup page. You can also establish the rules used to create the Basic Bank Account Number (BBAN) on this page. After the IBAN feature is enabled, the IBAN field and Validate button appear on the Source Bank Account page and the Maintain Bank Account pages for the country.

Related Topics

- Specifying Source Banks
  To specify source banks, use the Source Bank Accounts component (SRC_BANK).
- PeopleSoft Human Resources Administer Workforce: Entering Bank Account Information

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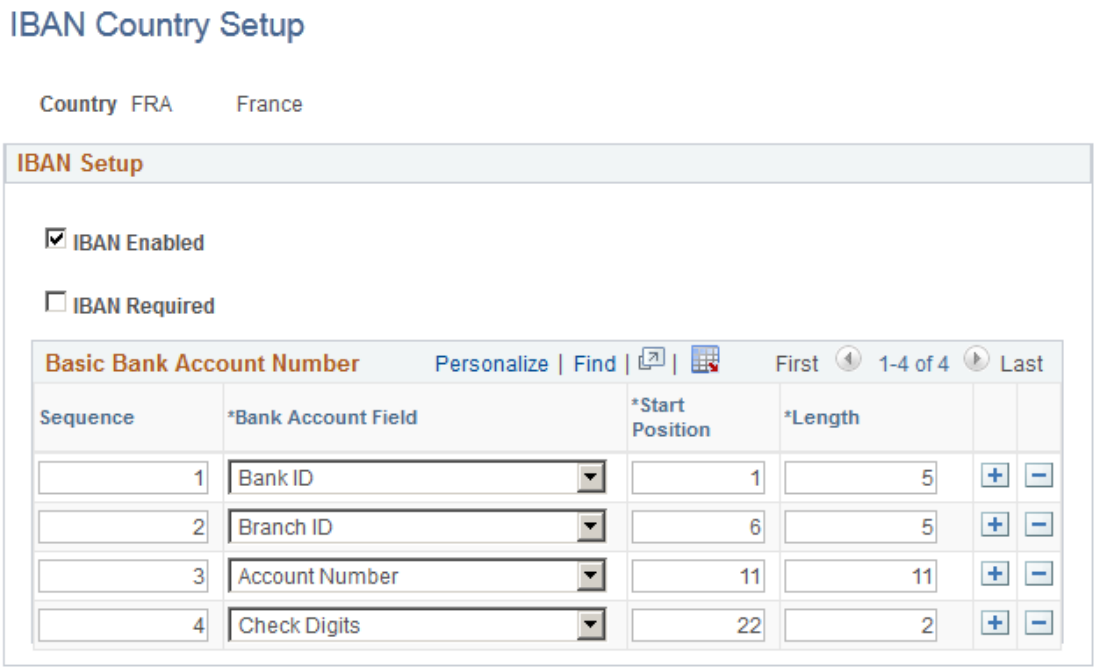
IBAN Country Setup Page

Use the IBAN Country Setup page (SETUP_IBAN_TBL) to enable the IBAN feature for a specific country. Create BBAN validation rules.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Banking**, and then **IBAN Country Setup**, and then **IBAN Country Setup**

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



Field or Control	Description
IBAN Enabled	Select this check box to enable the IBAN functionality for this country. If you enable IBAN, the IBAN field and the Validate button appears when you set up a source bank account page or a payee bank account with this country code.

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Field or Control	Description
IBAN Required	Select this check box to require an IBAN value for accounts in this country. If you select this check box, you must complete the IBAN fields when you set up a source bank account or a payee bank account with this country code. In addition, this check box controls whether the **Already have an IBAN Number** field appears on the following pages: • Define Deduction Recipients (RECIPIENT) • Information for Recipient (GP_RCP_PYE_SP) • Maintain Foreign Bank Account CHE (PYE_BANKACCT) • Override Source Bank CHE (PYE_BANKACCT) • Maintain Foreign Bank Account DEU (PYE_BANKACCT) • Maintain Foreign Bank Account DEU (PYE_BANKACCT) • Override Source Bank DEU (PYE_BANKACCT) • Bank Accounts (PYE_BANKACCT) • Maintain Bank Accounts (PYE_BANKACCT) • Source Bank Accounts (SRC_BANK) • Add Account Details (GP_SS_EE_BANK_DET) • Add Bank Account (HRS_APP_BANKACCT) If you select this check box, the Already have an IBAN Number field does not appear on the affected pages, requiring you to enter IBAN information. If you deselect this check box, the Already have an IBAN Number field appears on the affected pages giving you the option to enter either IBAN information or individual banking information.

See Specifying Source Banks.

See PeopleSoft Human Resources Administer Workforce: Entering Bank Account Information.

Basic Bank Account Number

Field or Control	Description
Sequence	Enter the order in which the value will appear in the Basic Bank Account Number (BBAN).
Bank Account Field	Select the field used to compose the BBAN.
Start Position	Enter the position where the **Bank Account Field** will begin.
Length	Enter the number of characters allotted for this **Bank Account Field.**

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Specifying Source Banks

To specify source banks, use the Source Bank Accounts component (SRC_BANK).

These topics provide an overview of and discuss how to specify source banks.

Pages Used to Specify Source Banks

Page Name	Definition Name	Usage
Source Bank Accounts Page	SRC_BANK	Assign a source bank ID and define information about the banks that pay out money.
(CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages	SRC_BANK_PY_SP	(CAN and USA) Specify data for banks in Canada or the U.S. This page is only available if you select *CAN* or *USA* as the **Country Code** on the Source Bank Accounts page.
(JPN) Japan Bank Additional Data Page	GPJP_SRC_BANK_SEC	(JPN) Specify the account type and company code for Japanese banks.

Understanding Source Banks

Source banks are the money sources that payroll disbursements are drawn from. For each source bank, identify the appropriate bank and bank branch, account number, and EFT formats.

For certain countries, such as the U.S., Canada, and Japan, you must set up additional information for source banks, accessed through the **Other Required Information** link on the Source Bank Accounts page. For countries in Europe, you must define International Bank Account Number (IBAN) information through the Source Bank Accounts page.

Payroll Setup

PeopleSoft Global Payroll users must link source banks to a pay entity.

See PeopleSoft Global Payroll: Understanding Banking.

PeopleSoft Payroll for North America users must link source banks to a pay group.

See PeopleSoft Payroll for North America: Pay Group Table - Bank/Tip Info Page.

Source Bank Accounts Page

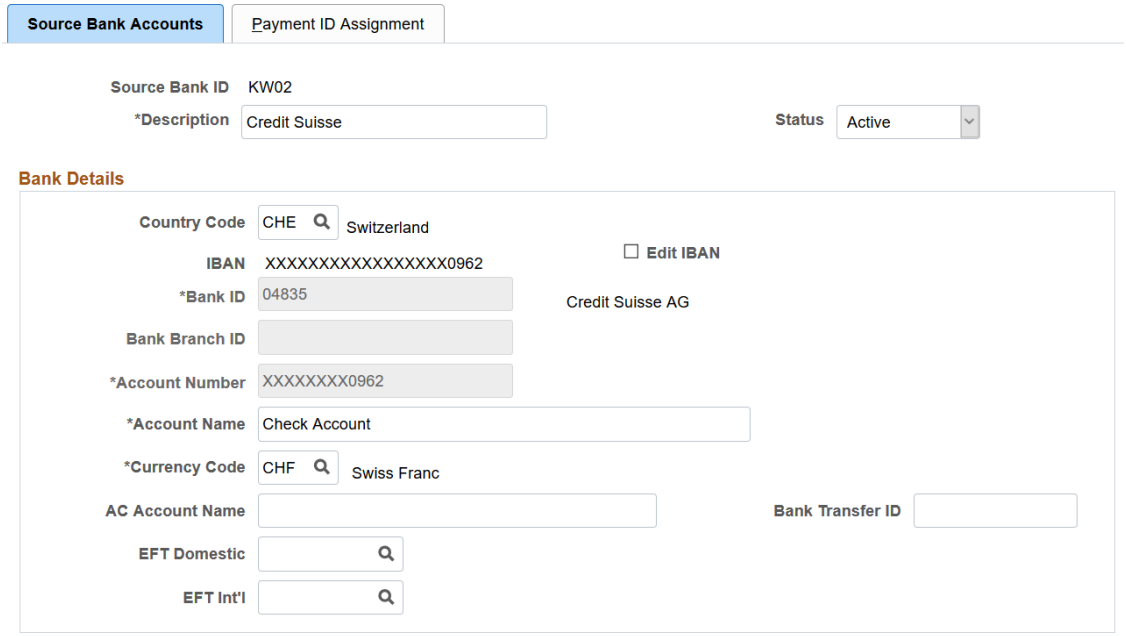
Use the Source Bank Accounts page (SRC_BANK) to assign a source bank ID and define information about the banks that pay out money.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Banking**, and then **Source Bank Accounts**, and then **Source Bank Accounts**

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This example illustrates the fields and controls on the Source Bank Accounts page. The IBAN on the page is displayed as masked. An option to edit the value becomes available after the encryption process has run.



Field or Control	Description
Description	Enter the name of the bank.
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.

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Field or Control	Description
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 SRC_BANK record, the IBAN is encrypted in the database if it belongs to a country that is specified on the Define Country for Encryption Page. Also, the IBAN appears as masked on this page. An exception to this is when the user is assigned the *Source Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the SRC_BANK record. In this case, the user sees the unmasked IBAN. Understanding Data Encryption for Payroll for North America and Understanding Data Encryption for Global Payroll for United States.
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. 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.

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Field or Control	Description
Account Number	Enter the account number for the person. If data encryption is enabled and the encryption process is run for the SRC_BANK 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. Also, the account number appears as masked on this page. An exception to this is when the user is assigned the *Bank Account Admin* or *Source Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the SRC_BANK record. In this case, the user sees the unmasked account number. Understanding Data Encryption for Payroll for North America and Understanding Data Encryption for Global Payroll for United States.
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. 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.
Other Required Information	Click this link to access the Additional Data page. Depending on the country that you select, this page might not be available. It is used to record information for companies that operate only in the U.S., Canada, or Japan. See (CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages. See (JPN) Japan Bank Additional Data Page.

Field or Control	Description
AC Account Name (alternate character account name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

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Field or Control	Description
EFT Domestic (electronic funds transfer domestic)	Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the **EFT Domestic** field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation. **Note:** If you want to generate Hong Kong HSBC IFILE, select IFILE in this field. Only active status in Electronic Transfer Format will be available for selection on Source Bank Accounts page. **Note:** Not applicable in the U.S. or Canada.
Bank Transfer ID	Enter the bank transfer ID that is used to identify banks to clearing systems.
EFT Int'l (electronic funds transfer international)	Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name is taken from the **EFT Int'l** field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

> **Note**
>
> The Payment ID Assignment page, found in this component, is specific to PeopleSoft Global Payroll and is documented in the PeopleSoft Global Payroll documentation.

(CAN and USA) Canada Bank Additional Data or US Bank Additional Data Pages

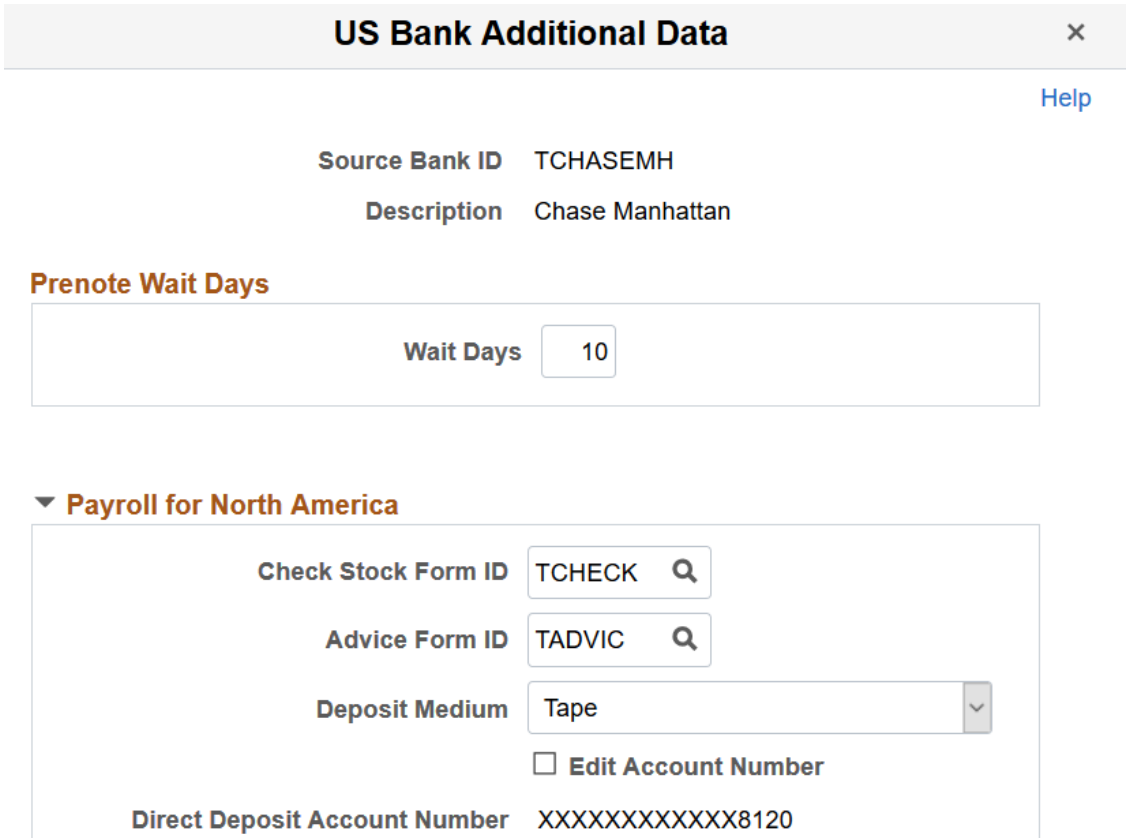
Use the Canada Bank Additional Data page (SRC_BANK_PY_SP) to specify data for banks in Canada, or use the US Bank Additional Data page (SRC_BANK_PY_SP) to specify data for banks in the US. This page is only available if you select *CAN* or *USA* as the country code on the Source Bank Accounts Page.

Navigation:

Click the **Other Required Information** link on the Source Bank Accounts page.

This example illustrates the fields and controls on the US Bank Additional Data page. You can find definitions for the fields and controls later on this page.

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Note

(USA, USF, CAN) Use the Direct Deposit Controls page (DIR_DEP_CNTRLS) to select options to control routing number/bank ID validation when employees set up direct deposit in self-service (and to control direct deposit email notifications). See PeopleSoft ePay: Setting Up and Viewing Direct Deposit in your PeopleSoft Payroll for North America product documentation.

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(USA) Prenote Wait Days

Field or Control	Description
Wait Days	Enter the number of prenote wait days. What you enter here at the source bank level determines whether the prenotification process is required or not. If you enter *0* in this field, there won't be a prenote generated at the payee level. If you enter any number other than *0* in this field, a prenote is required. When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks recommend an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days.* **Note:** Enable the prenote process to validate the transit numbers, which you specify at the employee level.

Payroll for North America

The Payroll for North America group box appears and must be defined only if you have PeopleSoft Payroll for North America installed.

Field or Control	Description
Check Stock Form ID	If your company generates checks, select the form ID for this source bank account.
Advice Form ID	If your company generates direct deposits, select the form ID for this source bank account. When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Form IDs are defined in the Form Table.
Edit Account Number	Select to update the direct deposit account number. This field appears when the encryption process has been run and the account number previously existed. When selected, the existing read-only account number is cleared from the field for you to enter a new one.

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Field or Control	Description
Direct Deposit Account Number	This field is displayed only when the bank ID (which is currently tied to the source bank ID on the Source Bank Accounts page), has an alternative bank ID populated on the Bank Table Page. If data encryption is enabled and the encryption process is run for the SRC_BANK 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. Also, the account number appears as masked on this page. An exception to this is when the user is assigned the *Bank Account Admin* or *Source Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the SRC_BANK record. In this case, the user sees the unmasked account number.
Deposit Medium	Specify how transactions are transferred to the bank for processing. Options are *Tape, EFT,* (electronic funds transfer), *Diskette,* and *Report.* For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the payroll process in any way.
(CAN) Routing Format	Enter the routing number. The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first. Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees' paychecks directly into their personal bank accounts. Valid values are: • *Lead 0, Bank ID, Branch ID.* • *Lead 0, Branch ID, Bank ID.* • *Bank ID, Branch ID* (no leading zero). • *Branch ID, Bank ID* (no leading zero).

(JPN) Japan Bank Additional Data Page

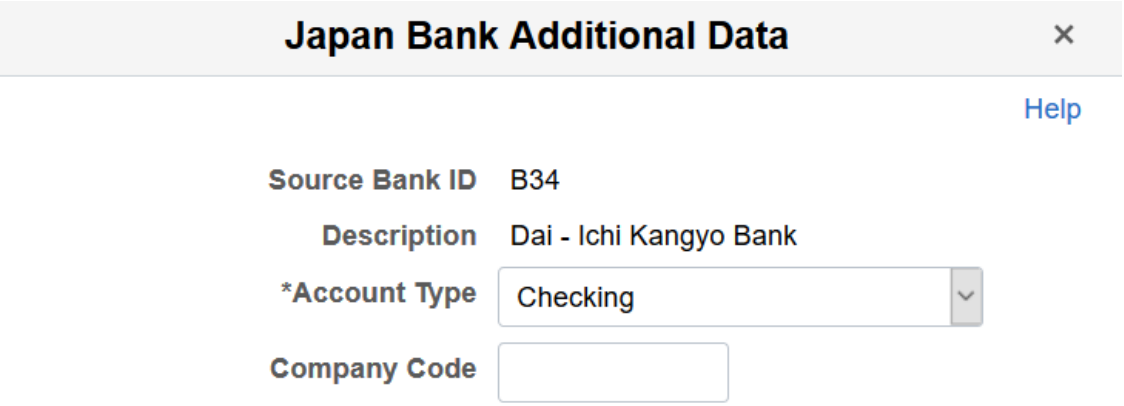
Use the Japan Bank Additional Data page (GPJP_SRC_BANK_SEC) to specify the account type and company code for Japanese banks.

Navigation:

Click the **Other Required Information** link for a Japanese bank on the Source Bank Accounts page.

This example illustrates the fields and controls on the Japan Bank Additional Data page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Account Type	The source bank account type. Values are *Checking* and *Regular*.
Company Code	Enter the ID that is assigned to the company by the banking institution.

Reporting on Banks and Bank Branches

To report on banks and bank branches, use the Bank/Branch Report (RUN_PAY701) component.

This topic lists the page used to report on banks and bank branches.

Page Used To Report on Banks and Bank Branches

Page Name	Definition Name	Usage
Bank/Branch Report Page	PRCSRUNCNTL	Run the Bank/Branch report that lists information from the bank and bank branch table.

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18

Setting Up and Working with ChartFields and ChartField Combinations

Understanding PeopleSoft ChartFields

In PeopleSoft applications, the fields that store your charts of accounts and provide your system with the basic structure to segregate and categorize transactional and budget data are called ChartFields. Each ChartField has its own attributes for maximum efficiency and flexibility in recording, reporting, and analyzing its intended category of data. While a particular ChartField always represents only one category of data, it stores many values that you use to further categorize that same data.

In addition to this basic categorization of a transaction amount using the account ChartField, you can simultaneously record the same transaction by product, project, fund, or any number of categories by using other ChartFields with appropriate values. This creates additional subsets of that same transactional data.

PeopleSoft delivers a set of ChartFields and associated functionality that fully covers most accounting and reporting requirements. ChartFields are designed to be configured by you to meet your specific requirements.

> **Note**
>
> For customers integrating with PeopleSoft 8.4 Financials or higher, most of the components described in these topics are display only.

Delivered ChartFields

This table describes the delivered ChartFields:

Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Account	Acct	ACCOUNT (10)	GL_ACCOUNT	Classifies the nature of a transaction. This field is required. Use it for corporate accounts.

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Department	Dept ID	DEPTID_CF (10)	DEPARTMENT_RO	Tracks information according to a divisional breakdown of your organization. Can be used to indicate who is responsible for or affected by a transaction.
Project/Grant	Project	PROJECT_ID (15)	PROJECT	Captures additional information useful for grant and project accounting. The Project/Grant ChartField does not have effective dating.
Product	Product	PRODUCT (6)	PRODUCT	Captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
Fund Code	Fund	FUND_CODE (5)	FUND_DEFINITIO N	The primary structural units of Education and Government accounting.
Program Code	Program	PROGRAM_CODE (5)	PROGRAM_DEFIN ITION	Tracks expenditures for programs within or across your organizations. Can be used to identify groups of related activities, cost centers, revenue centers, responsibility centers and academic programs.
Class Field	Class	CLASS_FLD (5)	CLASS_PNL	Can be used to identify specific appropriations.

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Affiliate	Affl	AFFILIATE (5)	N/A	Used to map transactions between business units when using a single interunit account.
Operating Unit	Operating Unit	OPERATING_UNIT (8)	OPERATING_UNIT	Can be used to indicate a location, such as a distribution warehouse or a sales center.
Alternate Account	Alt Account	ALTACCT (10)	ALTACCT	Classifies the nature of a transaction for regulatory authorities. Use it for statutory accounting.
Budget Reference	Budget Ref	BUDGET_REF (8)	BUDREF_PNL	Use to identify unique budgets, when individual budgets share budget keys and overlapping budget periods.
ChartField 1	Chartfield1	CHARTFIELD1 (10)	CHARTFIELD1	Generic expansion ChartField.
ChartField 2	Chartfield2	CHARTFIELD2 (10)	CHARTFIELD2	Generic expansion ChartField.
ChartField 3	Chartfield3	CHARTFIELD3 (10)	CHARTFIELD3	Generic expansion ChartField.
Activity ID	Activity	ACTIVITY_ID (15)	N/A	Activities are the specific tasks that make up a project. The Activity ChartField captures additional information useful for Project Costing. This ChartField does not have effective dating. It is delivered as inactive.

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Business Unit PC	PC Bus Unit	BUSINESS_UNIT_PC (5)	N/A	Used as an operational subset of an organization to organize project activity independently of the constraints of the standard accounting procedures for the financial posting and reporting of the organization.
Resource Type	RsrcType	RESOURCE_TYPE (5)	N/A	Source types identify the purpose or origin of a transaction. Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.
Resource Category	Category	RESOURCE_CATEGORY (5)	N/A	Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.
Resource Sub-Category	RsrcSubCat	RESOURCE_SUB_CAT (5)	N/A	Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Fund Affiliate	Fund Affil	AFFILIATE_INTRA 1 (10)	N/A	Use to correlate transactions between funds when using a single intraunit account. It is delivered as inactive.
Operating Unit Affiliate	Oper Unit Affil	AFFILIATE_INTRA 2 (10)	N/A	Use to correlate transactions between operating units when using a single intraunit account. It is delivered as inactive.

Note

N/A means not applicable.

Prerequisites

This table describes the service operations that you must configure in the HCM database to implement the ChartField and ChartField combination functionality:

Service Operation	Description
RELEASE_REQUEST	HCM requests an update of the General Ledger version from Financials.
RELEASE_RESPONSE	HCM receives the update of the General Ledger version from Financials.
FSCM_CF_CONFIG	HCM receives the specific ChartField configuration template from Financials.
One integration point for each GL ChartField	HCM receives the ChartField values published from the Financials database. See Entering and Maintaining ChartField Values.
HR_ACCT_CD_LOAD	HCM receives the combination codes imported from the Financials database or flat file and populates the GL Account Code table (GL_ACCT_CD_TBL).
HR_CHARTFLD_COMBO_SYNC	HCM receives the service operation published by the Financials database to keep the Speed Type table up to date.
COMBO_CF_EDIT_REQUEST	HCM sends a request to the Financials database (8.4.01 or higher version) to validate a combination code.

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Service Operation	Description
COMBO_CF_EDIT_REPLY	HCM receives and processes the response from the Financials database to a request for validation of a combination code.

> **Note**
>
> Most of these service operations require that you use PeopleSoft General Ledger in a version that is capable of using Integration Broker.

For more information, see the product documentation for *PeopleTools: Integration Broker*.

Related Topics

- Identifying Integrations for Your Implementation
  PeopleSoft uses PeopleSoft Integration Broker to integrate HCM applications with:

Specifying the General Ledger System and Version

These topics provide a comparison of functionality for different setup options and discuss specifying the General Ledger system.

Pages Used to Specify General Ledger System and Version

Page Name	Definition Name	Usage
Products Page	INSTALLATION_TBL1	Specify the PeopleSoft applications for your installation.
Product Specific Page	INSTALLATION_TBL1A	Enter product- and industry-specific installation information.

Understanding Comparison by General Ledger System and Version

The setup of the General Ledger indicator and General Ledger version on the Installation table impacts the ChartField combination edit functionality and the behavior of the ChartField pages.

This table compares the ChartField functionality for the different combinations of General Ledger indicator and version on the Installation table:

General Ledger Indicator	General Ledger Version	Update ChartField Configuration Template	Update or Add Individual ChartField Values	Combination validation using Integration Broker
Deselected	N/A	Yes	Yes, except Department ChartField	No

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General Ledger Indicator	General Ledger Version	Update ChartField Configuration Template	Update or Add Individual ChartField Values	Combination validation using Integration Broker
Selected	N/A	No. Use delivered ChartField template	Yes, except Department ChartField	No
Selected	Below 8.40.00	No. Use delivered ChartField template	No. Review only.	No
Selected	8.40.00	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	No
Selected	8.40.01 and above	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	Yes
Selected	9.0	No. ChartField Template updated by PeopleSoft Financials, including Project Costing ChartFields, if applicable, if Project Costing is selected on the Installation Table.	No. Review only.	Yes

> **Note**
>
> The Department ChartField is always set up as read only. Changes made to the Department table are automatically reflected in the Department ChartField.

Related Topics

- Setting Up Implementation Defaults
  To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

Specifying PeopleSoft General Ledger

To specify and update the PeopleSoft General Ledger system and version:

1. Select the **General Ledger** and **Project Costing** indicators on the Installation Table - Products page (INSTALLATION_TBL1).

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2. Click the **Update Version** button in the General Ledger group box on the Installation Table - Product Specific page (INSTALLATION_TBL1A).

   This button triggers a request to the Financials database and updates the GL version automatically.

> **Note**
>
> The default GL version is *N/A,* which you can update using the **Update Version** button if you use Financials 8.4 or higher for original ChartFields, or Financials 9.0 for project ChartFields.

Specifying Other General Ledger Systems

If you do not use PeopleSoft General Ledger, do not select the **General Ledger** check box on the Installation Table - Products page. The system displays N/A as the GL version.

If you select the **Project Costing** check box on the Installation Table - Products page but are not using PeopleSoft General Ledger, Project Costing ChartFields will be available to you for editing, but no validation with Financials is performed.

If Payroll for North America supports your General Ledger system, follow the system configuration instructions in the related documentation.

Setting Up the ChartField Configuration Template

To update the standard ChartField configuration template, use the Standard Configuration (STANDARD_CF_TMPLT) component.

These topics provide an overview of standard ChartField configuration and discuss ChartField configuration.

Pages Used to Review or Update the Standard ChartField Configuration Template

Page Name	Definition Name	Usage
Standard ChartField Configuration Page	STANDARD_CF_TMPLT	Activate ChartFields to make them available on the ChartField Values page. This page is not available for entry if you are integrating with PeopleSoft Financials.
Action Status Page	STANDARD_CF_LOG	View the status of ChartField changes. The report is produced by the PAY_CONFIG report.
ChartField Labels Page	STANDARD_CFLBL_LNG	View changes of ChartField labels for both base language and related language.

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Understanding Standard ChartField Configuration

PeopleSoft delivers the standard ChartField configuration template with two different ChartField types: original and project costing. You can access these ChartFields through the Standard ChartField Configuration page.

> **Note**
>
> The ChartField configuration template is review only if you use PeopleSoft Financials. Modifications to this ChartField configuration template should be done in the Financials system. If you use Financials 8.40 or above for original ChartFields, or Financials 9.0 for project costing ChartFields, configuration changes are sent to HCM by the FSCM_CF_CONFIG service operation.

Original ChartFields

PeopleSoft delivers the standard ChartField configuration template with fourteen active and two inactive original ChartFields in the following sequence:

- Account
- Department
- Project/Grant
- Product
- Fund Code
- Program Code
- Class Field
- Affiliate
- Operating Unit
- Alternate Account
- Budget Reference
- Chartfield 1
- Chartfield 2
- Chartfield 3
- Fund Affiliate (inactive)
- Operating Unit Affiliate (inactive)

> **Note**
>
> Original ChartField integration is available to those organizations that are on PeopleSoft Financials 8.4 or higher.

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Project Costing ChartFields

PeopleSoft delivers the standard ChartField configuration template with six project costing ChartFields, which have the following display order:

- Business Unit PC
- Project/Grant
- Activity ID
- Resource Type
- Resource Category
- Resource Sub-Category

> **Important**
>
> Project costing ChartFields are unique in that their display order is always the same in relationship to the position of the Project/Grant ChartField. When changing the field display order, all project costing ChartFields move together in a block; you can change the display order of a project costing ChartField but the other five ChartFields will remain in the same order in relation to that project costing ChartField.

> **Note**
>
> Project Costing ChartField integration is available to those organizations that are on PeopleSoft Financials 9.0. If your organization does not integrate with PeopleSoft Financials but you use PeopleSoft Project Costing, then the attributes of the project costing ChartFields can be modified in the standard ChartField configuration template.

See *PeopleSoft Project Costing.*

Modifying the ChartField Configuration Template

If you do not use PeopleSoft General Ledger, you can use the Standard ChartField Configuration page to make the following modifications to the standard ChartField configuration:

- Change the display order of ChartFields on pages and reports.
- Relabel long and short names (descriptions) of ChartFields.
- Inactivate or activate ChartFields.

  Inactivated ChartFields are not displayed on pages, reports, or in prompt lists. They are not included in indexes. While not displayed, they are not removed from records or pages. This significantly reduces configuration time and effort.
- Change the display length of ChartFields on pages and reports.
- Change Related ChartFields for IntraUnit Affiliate ChartFields.

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Importing the ChartField Configuration From PeopleSoft Financials

If you integrate with PeopleSoft Financials 8.40 or above for original ChartFields, or Financials 9.0 for project ChartFields, the system automatically sends the FSCM_CF_CONFIG service operation from the Financials database to the HCM database when the ChartField Configuration process (PYCONFIG) completes successfully in the Financials database.

The FSCM_CF_CONFIG service operation consists of Financials' latest ChartField template along with all corresponding ChartField labels. Upon receiving the service operation, the HCM database compares the configuration template and labels and generates the actions required to perform ChartField changes in HCM. These pending ChartField change actions reside on the Action Log file. You can review these changes on the Action Status page and determine the time to apply them to your system. Use controls on the Standard ChartField Configuration page to review the configuration status and apply the changes.

Standard ChartField Configuration Page

Use the Standard ChartField Configuration page (STANDARD_CF_TMPLT) to activate ChartFields to make them available on the ChartField Values page.

This page is not available for entry if you are integrating with PeopleSoft Financials.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **ChartField Configuration**, and then **Standard Configuration**, and then **Standard ChartField Configuration**

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

Standard ChartField Configuration

	Status	Order	*Field Long Name	*Field Short Name	Display Length	Affiliate Type	IntraUnit Related ChartField
☐	Active	1	Account	Acct	10		
☐	Active	2	Department	Dept ID	10		
☐	Active	3	Project/Grant	Project	15		
☐	Active	4	Product	Product	6		
☐	Active	5	Fund Code	Fund	5		
☐	Active	6	Program Code	Program	5		
☐	Active	7	Class Field	Class	5		
☐	Active	8	Affiliate	Affil	5	InterUnit	Business Unit
☐	Active	9	Operating Unit	Operating Unit	8		
☐	Active	10	Alternate Account	Alt Account	10		
☐	Active	11	Budget Reference	Budget Ref	8		
☐	Active	12	Chartfield 1	Chartfield1	10		
☐	Active	13	Chartfield 2	Chartfield2	10		
☐	Active	14	Chartfield 3	Chartfield3	10		
☐	Inactive	99	Fund Affiliate	Fund Affil	10	IntraUnit	
☐	Inactive	99	Operating Unit Affiliate	Oper Unit Affil	10	IntraUnit	

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The Standard ChartField Configuration page initially displays the ChartFields as delivered by PeopleSoft.

Field or Control	Description
Status	An active ChartField displays on pages, reports and prompt lists. An inactive ChartField is not displayed on pages, reports and prompt lists, but it is not removed from records and pages. Fund Affiliate, Operating Unit Affiliate, and the Project Costing ChartFields are delivered inactive but can be activated if the delivered active ChartFields are not sufficient for your requirements. **Note:** Do not change the status of a ChartField after you have run the full configuration and are using the system in production. Status determines whether ChartFields are displayed on pages, reports and prompt lists throughout the system.
Order	Change the order of display by changing the sequence of order numbers in this field. Inactive ChartFields have the order value of 99. Active ChartFields require an order number. When you activate an inactive ChartField, the system assigns it the next available number, which you can change to place the newly activated ChartField in any desired sequence. When you save the page, the system completes the final reordering to remove gaps or duplicates in the numbering sequence. **Note:** Project costing ChartFields are always the same in relationship to the position of the Project/Grant ChartField. When changing the field display order, all project costing ChartFields move together in a block.
Field Long Name and **Field Short Name**	Enter a new long name and short name to relabel the description of a ChartField. These names are displayed on pages, reports and prompt lists rather than the database field name of the ChartField.
Display Length	Enter a new value to change display length on pages. The display length cannot be greater than the actual field length of the ChartField.
Affiliate Type	An Affiliate ChartField is either an InterUnit or IntraUnit affiliate. Standard ChartFields have no affiliate type.
IntraUnit Related ChartField	A unique intraunit related ChartField of the same or smaller ChartField length must be specified for each intraunit affiliate ChartField that is active. (Business Unit is required for the InterUnit Affiliate ChartField.)
Activate	To activate an inactive ChartField, click the check box next to the field you want to activate and then click the Activate button.

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Field or Control	Description
Inactivate	To inactivate an active ChartField, click the check box next to the field you want to inactivate and then click the **Inactivate** button. **Note:** Do not inactivate a ChartField if you have transaction data posted to that ChartField. If you do, you will not be able to view that ChartField on pages and reports.
Impact	Click to run the ChartField Configuration PSJob process (PYCONFIG) in report mode to analyze the ChartFields changes and determine the impact of applying the new template.
Configuration Status	Click to access the Action Status page where you can view the standard ChartField activity log and pending changes, including changes that have been subscribed to from Financials but not yet applied. Before applying the subscribed changes, view their impact by clicking the **Impact** button. If you have saved changes but want to cancel them before applying them, use the Configuration Status - Action Status page to cancel the undesired configuration actions. This resets the ChartField to its previous configuration.
Apply	Click to run the ChartField Configuration PSJob process (PYCONFIG) in update mode to apply the ChartField configurations changes. **Note:** If you make any changes to the Standard Configuration pages, you must run the ChartField Configuration process in update mode to apply those changes before they take effect. After you apply your changes, the system displays only the active ChartFields. ChartFields display in the order and with the labels defined in this standard configuration.

Entering and Maintaining ChartField Values

To enter and maintain ChartField values, use the ChartField Values component (DEFINE_CF_VALUE).

These topics provide overviews of ChartField and discuss adding project, grant, and alternate account values.

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Pages Used to Set Up and Review ChartFields

Page Name	Definition Name	Usage
ChartField Values Page	DEFINE_CF_VALUES	Displays the links to the components of the *active* ChartFields. Click the link of the component you want to access. This page only displays links to the components of those ChartFields you activated on the Standard ChartField Configuration page.
GL Account Table Page	GL_ACCOUNT	Set up new account ChartField values. Account values are used in combination with other ChartFields values to create valid ChartField Combinations. This page is not available for entry if you are integrating with PeopleSoft Financials.
Department Page	DEPT_CHARTFIELD	Review a department. Departments typically represent a divisional classification of a larger entity in your organization (such as a profit center, an operating unit, a school within a university, or a bureau of a government). Its emphasis is usually on budget and responsibility accounting. This page is not available for entry.
Project/Grant Page	PROJECT_CF	Add project values, set up project start and end dates, and project status. This page is not available for entry if you are integrating with PeopleSoft Financials.
Product Page	PRODUCT	Add product codes. This page is not available for entry if you are integrating with PeopleSoft Financials.
Fund Code Page	FUND_DEFINITION	Define fund values for all types of funds. Funds are primary structural units for education and government accounting. Funds are maintained as a balanced set of accounts and are used to present financials statements. This page is not available for entry if you are integrating with PeopleSoft Financials.

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Page Name	Definition Name	Usage
Program Code Page	PROGRAM_DEFINITION	Set up codes to enable financial tracking of programs. This page is not available for entry if you are integrating with PeopleSoft Financials.
Class Field Page	CLASS_PNL	Set up codes to enable financial tracking of class amounts, such as salaries or bonuses. This page is not available for entry if you are integrating with PeopleSoft Financials.
Operating Unit Page	OPERATING_UNIT	Set up codes to identify a unit of operation for financial tracking. This page is not available for entry if you are integrating with PeopleSoft Financials.
Alternate Account Page	ALTACCOUNT	Set up new alternate account ChartField values. This page is not available for entry if you are integrating with PeopleSoft Financials.
Budget Reference Page	BUDREF_PNL	Set up unique budgets where budgets share budget keys and overlapping periods. This page is not available for entry if you are integrating with PeopleSoft Financials.
ChartField 1 Page	CHARTFIELD1	Set up new account ChartField 1 values. ChartField 1 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. This page is not available for entry if you are integrating with PeopleSoft Financials.
ChartField 2 Page	CHARTFIELD2	Set up new account ChartField 2 values. ChartField 2 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. This page is not available for entry if you are integrating with PeopleSoft Financials.

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Page Name	Definition Name	Usage
ChartField 3 Page	CHARTFIELD3	Set up new account ChartField 3 values. ChartField 3 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. This page is not available for entry if you are integrating with PeopleSoft Financials.
Business Unit PC Page	BUSINESS_UNIT_PC	Set up business units for project costing to plan projects and gather business data without the constraints of the enterprise's standard accounting procedures for financial posting and reporting. The project costing business unit determines the values available for the **Project ID, Activity ID, Resource Type, Resource Category,** and **Resource Sub-Category** fields. This page is not available for entry if you are integrating with PeopleSoft Financials.
Activity ID Page	ACTIVITY_ID	(Optional) Create standard activity types to facilitate reporting and analysis. Activity is dependent on the project costing business unit. The **Business Unit PC** and **Project ID** values must be selected before you can select the **Activity ID** value. This page is not available for entry if you are integrating with PeopleSoft Financials.
Resource Type Page	RESOURCE_TYPE	Define resource types that you can assign to individual transactions to identify the transaction's purpose. Resource types are necessary for Project Costing resource groups, reports, and processes to function properly; if not implemented, these source types must still be configured. This page is not available for entry if you are integrating with PeopleSoft Financials.

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Page Name	Definition Name	Usage
Resource Category Page	RESOURCE_CATEGORY	(Optional) Set up resource categories to further define resource types. You can combine categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. This page is not available for entry if you are integrating with PeopleSoft Financials.
Resource Sub-Category Page	RESOURCE_SUB_CAT	(Optional) Set up sub-categories to further define categories and resource types. You can combine categories and sub-categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. This page is not available for entry if you are integrating with PeopleSoft Financials.

Understanding ChartField Import from Financials

If you use PeopleSoft Financials release 8.0 or later, import ChartField values from the Financials database and keep them up to date using Integration Broker.

This table lists the service operations used to import original ChartFields from Financials by Integration Broker:

ChartField	Service Operation
Account	ACCOUNT_CHARTFIELD_FULLSYNC ACCOUNT_CHARTFIELD_SYNC
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC
Product	PRODUCT_CHARTFIELD_FULLSYNC PRODUCT_CHARTFIELD_SYNC
Fund Code	FUND_LOAD FUND_CF_SYNC
Program Code	PROGRAM_CF_FULLSYNC PROGRAM_CF_SYNC
Class Field	CLASS_CF_FULLSYNC CLASS_CF_SYNC
Operating Unit	OPER_UNIT_CF_FULLSYNC OPER_UNIT_CF_SYNC
Alternate Account	ALTACCT_CF_FULLSYNC ALTACCT_CF_SYNC

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ChartField	Service Operation
Budget Reference	BUDGET_REF_CF_FULLSYNC BUDGET_REF_CF_SYNC
ChartField 1	CHARTFIELD1_FULLSYNC CHARTFIELD1_SYNC
ChartField 2	CHARTFIELD2_FULLSYNC CHARTFIELD2_SYNC
ChartField 3	CHARTFIELD3_FULLSYNC CHARTFIELD3_SYNC

You can view the imported ChartField values from the ChartField Values page.

This table lists the additional service operations used to import Project Costing ChartFields from Financials 9.0 by Integration Broker:

ChartField	Service Operation	Purpose
Business Unit PC	BUS_UNIT_PC_FULLSYNC BUS_UNIT_PC_SYNC	Provide integration of business unit information between Financials and HCM.
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC	Provide the project, general information, and descriptions between Financials and HCM
Activity ID	PROJECT_ACTIVITY_FULLSYNC PROJECT_ACTIVITY_SYNC	The PROJECT_ACTIVITY_FULLSYNC messaging publishes all the rows in the PROJ_ACTIVITY table. The PROJECT_ACTIVITY_SYNC provides changes in the activities for the project, general information, and descriptions between Financials and HCM.
Resource Category	RESOURCE_CAT_FULLSYNC RESOURCE_CAT_SYNC	Provide the full table data as well as changes to the resource category table from Financials to HCM.
Resource Sub-Category	RESOURCE_SUB_CAT_FULLSYNC RESOURCE_SUB_CAT_SYNC	Provide the full table data as well as changes to the resource subcategory table from FMS to HCM.
Resource Type	RESOURCE_TYPE_FULLSYNC RESOURCE_TYPE_SYNC	The RESOURCE_TYPE_FULLSYNPC messaging provides the complete resource table information in the message from Financials to HCM. The RESOURCE_TYPE_SYNC messaging provides the changes only to HCM.

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> **Note**
>
> In PeopleSoft Financials, combination editing does not support the publishing of detail project ChartFields to HCM since the source record is the COMBO_DATA_TBL, which does not include the detail project ChartFields. The only project ChartField that is published is PROJECT_ID.

For more information, see the product documentation for *PeopleTools: Integration Broker*.

Related Topics

- Identifying Integrations for Your Implementation
  PeopleSoft uses PeopleSoft Integration Broker to integrate HCM applications with:

Understanding ChartField Values for Other Financials Systems

If you do not integrate with PeopleSoft Financials, or the Financials system does not have Integration Broker capability, you must directly enter and maintain ChartField values in the HCM database.

The active ChartFields on the Standard ChartField Configuration page determines the pages that are available for entering ChartField values.

> **Note**
>
> PeopleSoft recommends that you not use special characters and embedded blanks in ChartField values. Use the generally accepted alphanumeric characters and the underscore. Special characters and embedded blanks can be problematic and in particular can cause problems in some background processes.

Other than the Project ChartField, all changes to the definition of a ChartField value are effective-dated. Therefore, you can establish when you want to *activate* a department, *introduce* a product line, or *close* an account. Use effective dating with activation and inactivation functionality to maintain a full history of all changes or additions, to provide a complete audit trail, and to make possible historical comparisons with past, present, or future conditions. When you no longer use a certain ChartField value, add a row to create an effective-dated *inactive* entry, instead of inactivating the original row. If you simply make the existing row *inactive,* you will have no history of its time as an active ChartField value.

After you initially populate the ChartField tables, you can maintain them from the ChartField Values page.

Understanding Affiliate ChartFields

If your organization uses commitment accounting, use affiliate ChartField values when interunit or intraunit transactions are maintained using the same account ChartField values among several related entities (such as business units, funds, or operating units). For example, each entity might use account 140000 as both an interunit receivables and payables account. Each entity could have a different account. However, in each instance an affiliate ChartField value must be assigned to the accounting line to identify the entity with which the receivable or payable is shared.

PeopleSoft delivers the following affiliate ChartFields:

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- Affiliate ChartField.

  Used only for *interunit* accounting in association with business unit.

- Fund affiliate ChartField.

  Used for *intraunit* accounting between entities.

- Operating unit affiliate ChartField.

  Used for *intraunit* accounting between entities.

Affiliate ChartField values are the values of the related ChartField. In other words, there is no separate affiliate ChartField page where you enter affiliate values as with the stand alone ChartFields, such as account or department.

Business unit is required as the interunit-related ChartField for affiliate. It provides the values available in the list box for the Affiliate field on the Journal Entry page.

Understanding Project Costing ChartFields

In Project Costing, you can define dependencies between resource types, categories, and sub-categories. These relationships control data entry and help reduce errors. If you use PeopleSoft Financials, specify these options on the Project Costing Definition page in the Project Costing application.

PeopleSoft delivers the following project costing ChartFields:

- Resource Type
- Resource Category
- Resource Sub-Category

Resource types can be as general or as specific as needed. For example, you can use a labor resource type to track total project labor costs, or use overtime labor and standard labor resource types to track overtime and standard labor separately.

You can combine categories and sub-categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. For example, you can divide a labor resource type into different categories of labor, such as architect labor, carpenter labor, and plumber labor, and you can create sub-categories for regular hours and overtime hours. By using these categories and sub-categories, you can track items such as total labor costs for a project, total overtime hours, architect overtime hours, and carpenter standard hours.

Resource types, categories, and sub-categories provide flexibility for defining transactions. You can define relationships between these fields to control data-entry options for specific fields. The relationships can be one-to-one or one-to-many. If you relate resource types to specific categories, and assign a resource type to a transaction, you can assign a resource category only if it is related to the resource type. For example, a transaction with a labor resource type can only be entered in a resource category that is related to labor. The same is true for relationships between resource categories and resource subcategories.

Project/Grant Page

Use the Project/Grant page (PROJECT_CF) to add project values, set up project start and end dates, and project status.

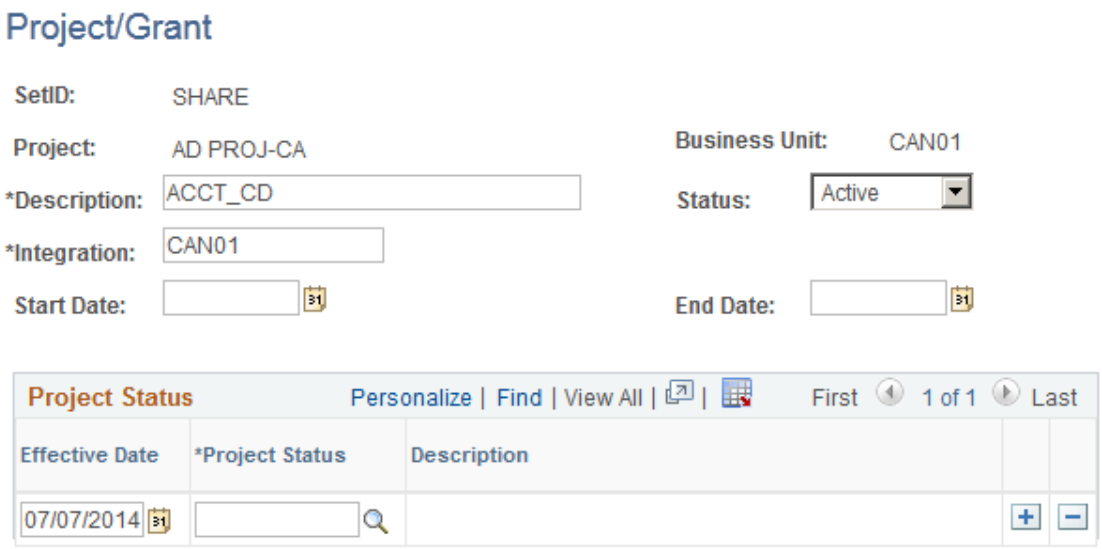
This page is not available for entry if you are integrating with PeopleSoft Financials.

Navigation:

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Click the **Project/Grant** link on the ChartField Values page.

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



Field or Control	Description
Integration	Use to select an integration template for the project and project level.
Start Date and **End Date**	These fields are for information only. There is no processing behind them.
Project Status	Enter the effective date and select a project status to indicate the various stages of the life cycle for the project. **Note:** These fields are for information only.

Alternate Account Page

Use the Alternate Account page (ALTACCOUNT) to set up new alternate account ChartField values.

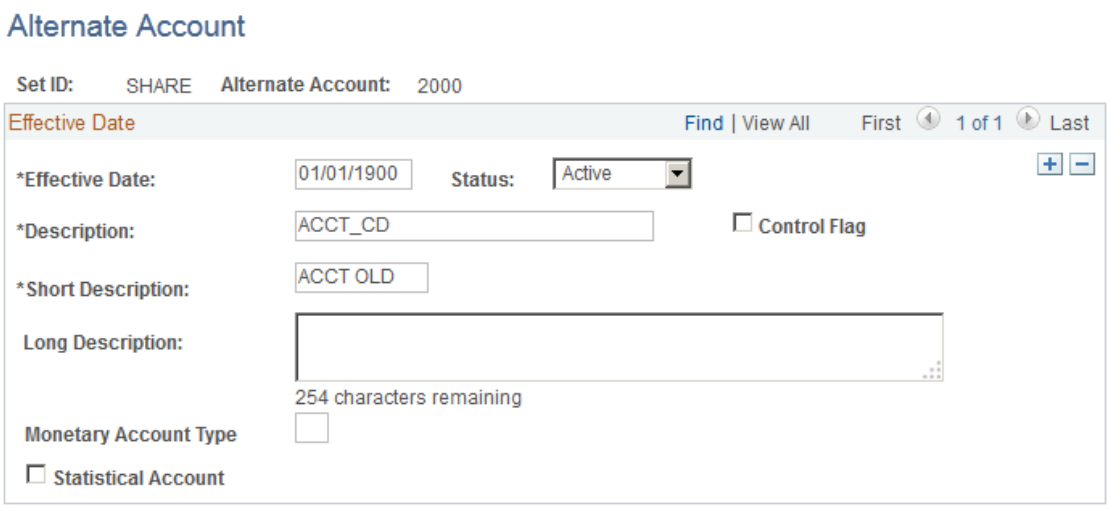
This page is not available for entry if you are integrating with PeopleSoft Financials.

Navigation:

Click the **Alternate Account** link on the ChartField Values page.

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

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The PeopleSoft alternate account feature enables you to enter a statutory chart of accounts as well as analytic or primary accounts at the detail transaction level. The alternate account produces journal line or transaction level balances for statutory reporting requirements. The primary account ChartField contains the corporate accounts, and alternate account ChartField contains the statutory accounts. This is useful for organizations that have two different reporting requirements—one for internal management or a corporate parent, and another for a local jurisdiction or national government.

In PeopleSoft applications, the analytic or primary account ChartField is ACCOUNT.

Local regulatory authorities often require *statutory* accounts. In PeopleSoft applications, this is termed the alternate account ChartField (ALTACCT).

You link alternate account ChartField values with account ChartField values. When you enter values for the account ChartField, the system enters the associated alternate account value. When you enter values for the alternate account ChartField, the system enters the associated account value. You can override the default values by selecting another value from the prompt list. The system displays only account values that you have mapped to the account or alternate account ChartField.

> **Note**
>
> You can map alternate account ChartFields only to account ChartFields with the same attributes unless they have a different Set ID.

Field or Control	Description
Long Description	Optionally, you can enter the purpose or use of the alternate account, and an explanation of the type of transactions that are to be posted to it. **Note:** This field is for information only.
Monetary Account Type	Select from the types previously defined on the Account Types page. **Note:** This field is for information only.

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Field or Control	Description
Statistical Account	Used for statistical amounts, not monetary amounts. If you select the check box, you must specify a unit of measure. **Note:** This field is for information only.
Control Flag	Select to indicate that you can update this alternate account only by using the Journal Generator. A control account represents a summarization of detail from an application. **Note:** This field is for information only.

Entering and Maintaining Valid ChartField Combinations

To populate HCM with valid ChartField combinations, use the Load Combination Code Table (RUN_BUD003) and Combination Code Table (VALID_COMBO_TABLE) components.

These topics provide overviews of combination codes, valid combination loading, and speed types, and discuss combination codes.

Pages Used to Enter and Review ChartField Combinations

Page Name	Definition Name	Usage
Load Combination Code Table Page	RUNCTL_FILEPATH	Run the Load Combination Code process (BUD003) to load the Combination Code table with ChartField combinations already imported into the GL_ACCT_CD_TBL using the HR_ACCT_CD_LOAD service operation.
Combination Code Table Page	VALID_COMBO_TBL	Review all combination codes imported into HCM and loaded by the Load Combination Code process (BUD003) Manually define and review valid combinations of ChartField values if not importing them.
Funding Source Information Page	HP_FUNDSRC_INF_SBP	View the default funding end date for a funding source. The Manage Commitment Accounting business process in PeopleSoft Human Resources uses this information.
Combination Code Report Page	PRCSRUNCNTL	Run the Combination Code report (PAY760) to report on the contents of the Valid Combination table (VALID_COMBO_TBL).
SpeedTypes Page	HMCF_SPEEDTYPE	Review the Speed Type table maintained from PeopleSoft Financials.

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Understanding Combination Codes

A combination code is a key that defines a combination of ChartFields. When you run processes to post transactions to the general ledger, the combination code identifies the ChartFields to include on each transaction.

A valid combination code is a combination of ChartFields that are valid in general ledger. Store valid combination codes in the Valid Combination table (VALID_COMBO_TBL) to be used by the ChartField combination validation process.

> **Note**
>
> If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Combination Code table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so that you can track them and reuse them.

Related Topics

- Editing ChartField Combinations in HCM Transactions
  These topics provide an overview of ChartField validation and discuss editing ChartField combinations.

Understanding Valid Combination Table Loading

This topic discusses three methods of entering valid combination codes into the Valid Combination table. The method you use depends primarily on which General Ledger system and version you use.

Importing from the Financials Database

If you integrate with PeopleSoft Financials 8.0 or later, you can import the valid ChartField Combinations from the Financials database and keep them up to date using Integration Broker.

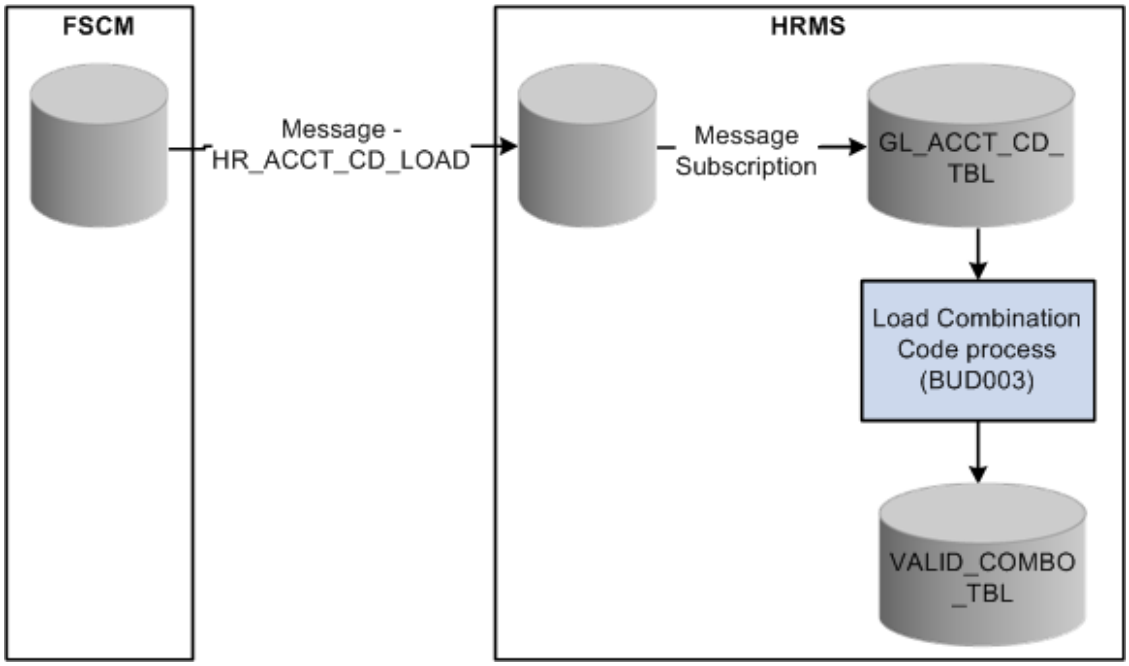
To import valid combinations from Financials:

1. Publish combination data information from Financials (FSCM) to HCM using the HR_ACCT_CD_LOAD Integration Broker service operation.

   When HCM receives this service operation, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL.
2. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes from the Financials database as described above:

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Flat File Loading

If you integrate with a financials system that does not have Integration Broker capability, you can use the Inbound Flat File process to load and maintain the Valid Combination table (VALID_COMBO_TBL).

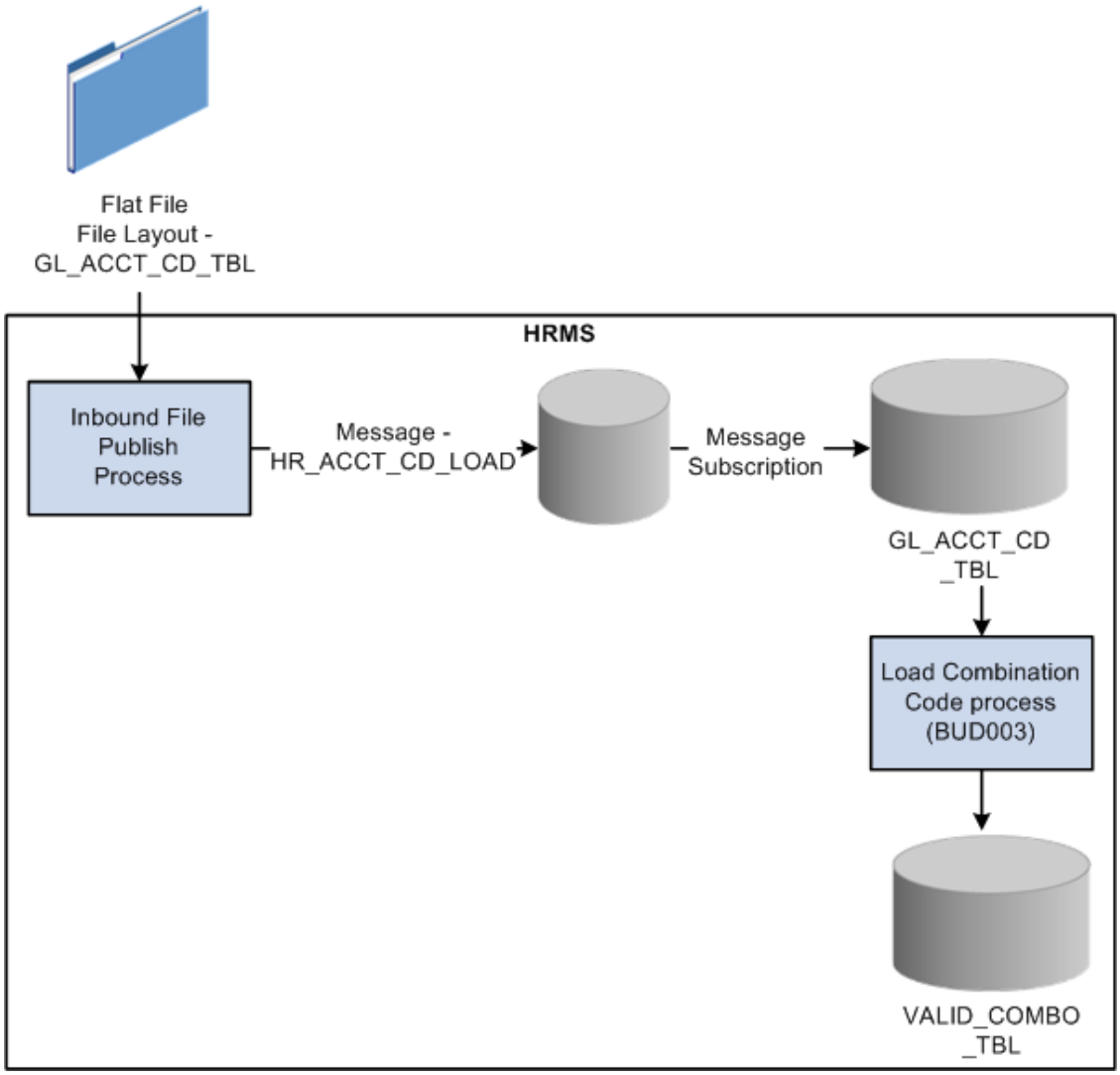
To populate valid combination codes using the Inbound Flat File process:

1. Create a flat file that contains valid combination data in the layout format specified by GL_ACCT_CD_TBL.
2. Initiate the Inbound Flat File process to publish this combination data using the HR_ACCT_CD_LOAD service operation.

   When the service operation is received, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL
3. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes using a flat file as discussed above:

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Manual Loading

If you do not integrate with PeopleSoft Financials, you can enter valid ChartField combinations directly into the Combination Code Table page. This page is not available for manual data entry if the GL indicator is selected on the Installation table.

See *PeopleSoft FSCM: Resource Management*.

Understanding Speed Types

Speed types are shortcut keys for frequently used combinations of ChartFields. Using speed types can minimize keying, greatly increase journal efficiency, and reduce errors.

If you integrate with PeopleSoft Financials 8.0 or later, you can use the HR_CHARTFLD_COMBO_SYNC service operation to keep the Speed Type table up to date. Any change made to the Speed Type table in the Financials database triggers the Integration Broker update to HCM.

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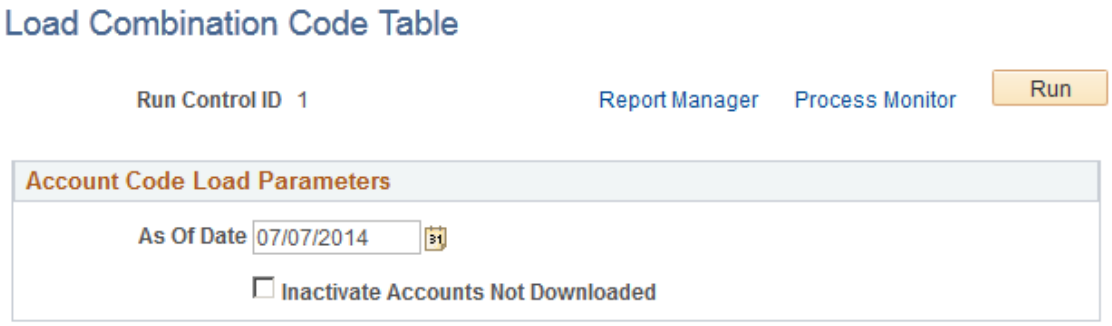
Load Combination Code Table Page

Use the Load Combination Code Table page (RUNCTL_FILEPATH) to run the Load Combination Code process (BUD003) to load the Combination Code table with ChartField combinations already imported into the GL_ACCT_CD_TBL using the HR_ACCT_CD_LOAD service operation.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **ChartField Configuration**, and then **Load Combination Code Table**, and then **Load Combination Code Table**

This example illustrates the fields and controls on the Load Combination Code Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
As of Date	Enter the as of date for the ChartField combinations you are importing from PeopleSoft General Ledger.
Inactivate Accounts Not Downloaded?	When this option is selected, the system inactivates combinations for which it doesn't find matches in the current fiscal year. When this option is blank, old combinations remain active for the current fiscal year.

Combination Code Table Page

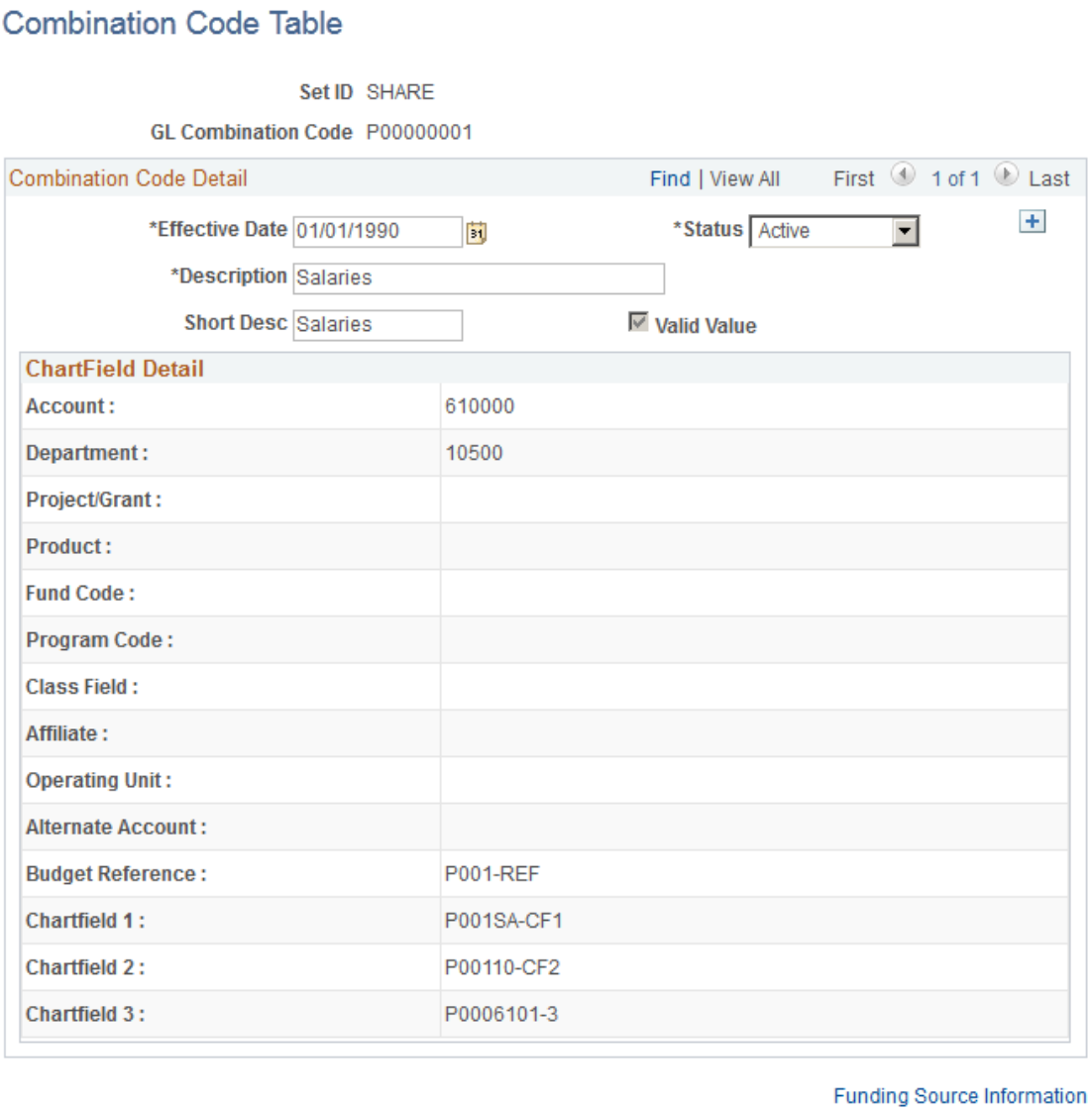
Use the Combination Code Table page (VALID_COMBO_TBL) to review all combination codes imported into HCM and loaded by the Load Combination Code process (BUD003) Manually define and review valid combinations of ChartField values if not importing them.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **ChartField Configurations**, and then **Combination Code Table**, and then **Combination Code Table**

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

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Note

You cannot change the ChartField values for combination codes imported from Financials, but you can change the description and make it active or inactive.

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Field or Control	Description
GL Combination Code (general ledger combination code)	Enter this code on the HCM pages to use this combination of ChartFields in a transaction. The system generates the combination code sequentially based on the Installation table's **Last Combination Code Assigned** field under these conditions: • The ChartField combination is received from Financials by Integration Broker. • The **GL Combination Code** value is not supplied on the inbound flat file. • You manually add the ChartField combination and do not pre-assign the **GL Combination Code** value.
Valid Value	This field is available for entry when entering the ChartField combination for the first time for the setID. Select it if the ChartField combination is valid. If the combination already exists with the same setID, this field is populated based on the value of the preexisting combination and is unavailable for change.
Funding Source Information	Click this link to view the Funding Source Information page, which displays the default funding end date. The Manage Commitment Accounting business process uses the default funding end date in department budgets and in encumbrance definitions. See PeopleSoft Human Resources Manage Commitment Accounting: Funding End Dates and Multiyear Encumbrances.

ChartField Detail

If you're setting up combination codes manually, enter the ChartField value for each ChartField that applies to this ChartField combination.

> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Reviewing and Maintaining ChartField Transactions

To review and maintain ChartField transactions, use the ChartField Transaction Table (ACCT_CD_TABLE) component.

These topics provide an overview of the ChartField Transaction search page, the ChartField Transaction Table, and discuss how to review and maintain ChartField transactions.

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Pages Used to Review and Maintain ChartField Transactions

Page Name	Definition Name	Usage
ChartField Transaction Table Page	ACCT_CD_TABLE	View the ChartField Transaction Table with ChartField combinations once they've been used in processing. Maintain additional information about combination codes on this page.
ChartField Transaction Report Page	PRCSRUNCNTL	Run the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

Understanding the ChartField Transaction Search Page

When you access the ChartField Transaction Table search page, the system presents you with a **Search Additional Chartfields** field. Use this field to narrow the search of the type of ChartField you wish to access. Options include *Original ChartFields, Additional ChartFields,* and *Project Costing ChartFields.* The search page defaults to searching for the original ChartFields, unless otherwise specified in this field.

Understanding the ChartField Transaction Table

The system creates a record whenever you use a new combination of ChartField values in an HCM transaction, whether you select a valid combination code or select a combination of individual ChartField values on the transaction page. It stores that combination in the ChartField Transaction table to maintain a history of ChartField combinations used in transactions.

You can use the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

> **Note**
>
> If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Valid Combination table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so you can track them and reuse them.

ChartField Transaction Table Page

Use the ChartField Transaction Table page (ACCT_CD_TABLE) to view the ChartField Transaction Table with ChartField combinations once they've been used in processing.

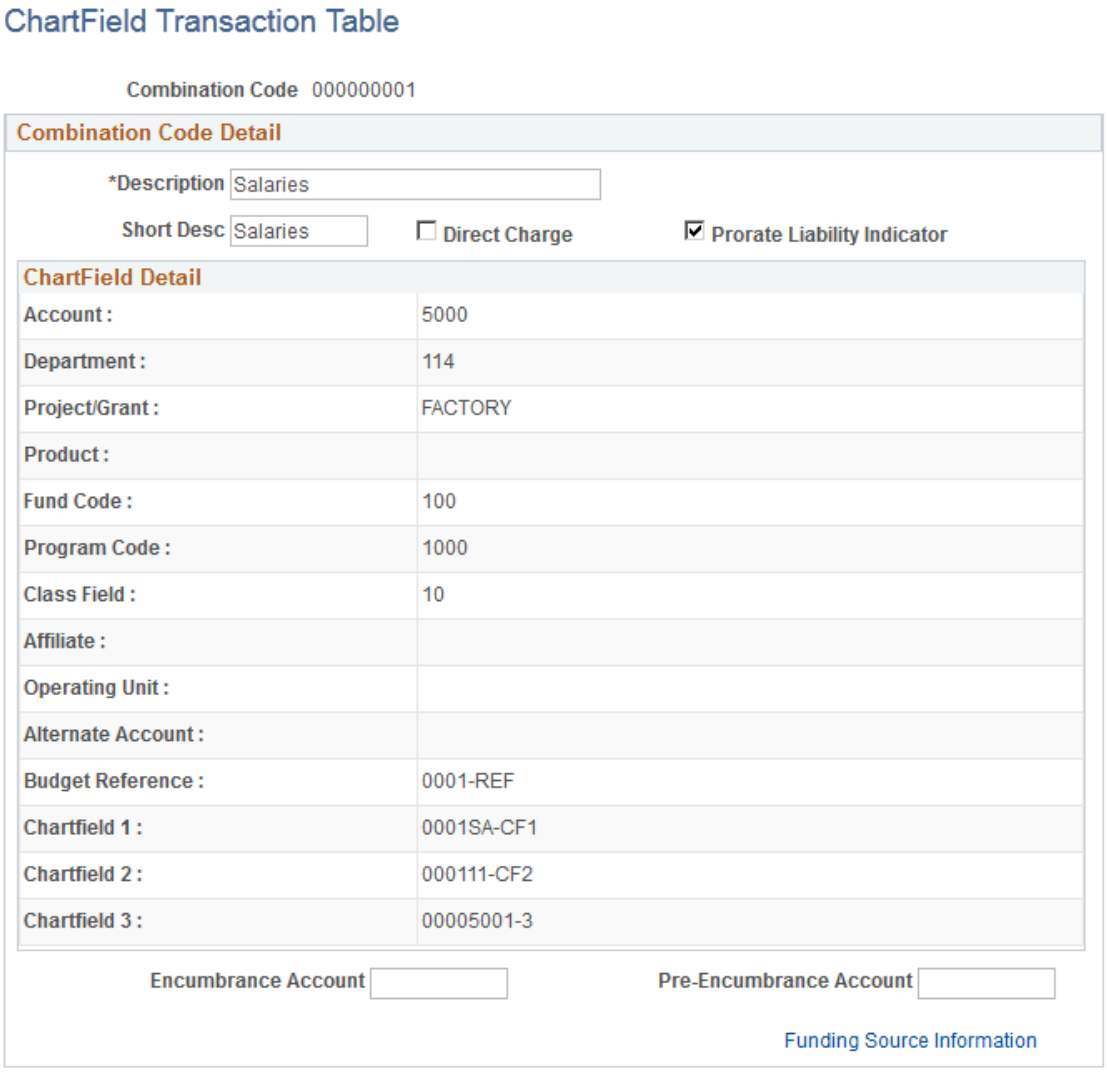
Maintain additional information about combination codes on this page.

Navigation:

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- **Set Up HCM**, and then **Common Definitions**, and then **ChartField Configurations**, and then **ChartField Transaction Table**, and then **ChartField Transaction Table**
- **Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Budget Information**, and then **ChartField Transaction Table**, and then **ChartField Transaction Table**

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



The ChartField information on this page is unavailable for entry, but you can maintain information about the combination. Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

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Field or Control	Description
Combination Code	If this is not a valid combination code imported into or created in the Valid Combination table, the system assigns this unique combination of ChartFields a combination code. You can use the combination code on the transaction pages to reuse this particular combination of ChartFields.

Combination Code Detail

Field or Control	Description
Direct Charge	Select this check box to indicate whether you'll use this combination code during the Actuals Distribution process. This field is for information only; it has no affect on processing.
Prorate Liability Indicator	If you want to prorate liabilities, select this check box. The system looks for the **Prorate Liability Indicator** flag when it runs the Actuals GL Interface process. If you select this indicator, employee paid taxes and deductions are prorated back across the earnings expenses.
Encumbrance Account and **Pre-Encumbrance Account**	These fields are available for use in your own GL interface programs. The Manage Commitment Accounting business process in PeopleSoft Human Resources does not use these fields.
Funding Source Information	Click this link to view the Funding Source Information page, which displays the default funding end date for this combination code. See PeopleSoft Human Resources Manage Commitment Accounting: Funding End Dates and Multiyear Encumbrances.

Editing ChartField Combinations in HCM Transactions

These topics provide an overview of ChartField validation and discuss editing ChartField combinations.

Pages Used to Edit ChartField Combinations in HCM Transactions

Page Name	Definition Name	Usage
ChartField Details Page	HMCF_HRZNTL_CFLD	Enter or review ChartFields or combination codes in PeopleSoft HCM transactions.
Search Combination Codes Page	HMCF_VLD_CMBO_SRCH	Search for ChartFields using valid combination codes.
Search Speed Types Page	HMCF_SPD_TYP_SRCH	Search for ChartFields using PeopleSoft Financials Speed Types.

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Page Name	Definition Name	Usage
Search Combo Codes Page	HMCF_CMBO_CD_SRCH	Select ChartFields individually or search for valid chartfield combinations already used in transactions.

Understanding ChartField Validation

Any HCM transaction page on which you enter a ChartField combination code accesses a common ChartField Details page (HMCF_HRZNTL_CFLD) where you enter or view the ChartField details associated with the combination code. If you enter a new ChartField combination, the system performs a combination code validation process to ensure that the entered combination is valid.

The system uses one of these validation methods:

- If you integrate with PeopleSoft Financials 8.4.01 or higher, the system uses the COMBO_CF_EDIT_REQUEST and COMBO_CF_EDIT_REPLY service operations to validate the combination with the Financials database.
- If you do not integrate with PeopleSoft Financials 8.4.01 or higher and you populated the Valid Combination table (VALID_COMBO_TBL) with valid combinations, the system searches the Valid Combination table to find the ChartField combination that matches the individual ChartField values specified.
- If you do not integrate with PeopleSoft Financials 8.4 or higher and you did not populate the Valid Combination table, the system assumes the combination of ChartFields that you selected is valid and searches the Transaction table to find the match.

  If it finds a match, it uses the corresponding combination code. If it does not find a match, it generates a combination code using the next available number.

> **Note**
>
> The effective date of the newly created combination code is the current date. If the effective date of the transaction is earlier than this date, you need to modify the effective date of the newly created combination code so that it will be a valid code for the transaction from which you created it.

ChartField Details Page

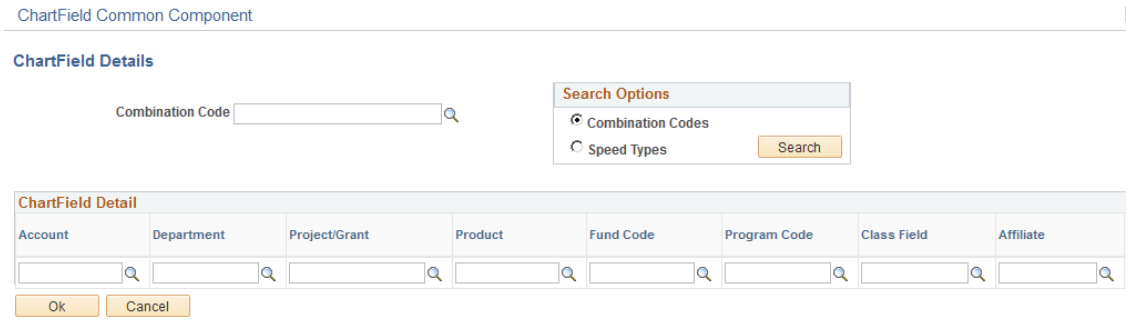
Use the ChartField Details page (HMCF_HRZNTL_CFLD) to enter or review ChartFields or combination codes in PeopleSoft HCM transactions.

Navigation:

Click the **ChartField Details** or **Edit ChartFields** link or button on an HCM transaction page.

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

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



> **Note**
>
> This page might have a more specific name, depending upon the transaction page from which you access it.

If the combination code is already entered on the transaction page, this detail page displays the associated ChartField values. If you are in correction mode or in a new effective dated row on the transaction page, then you can make changes to individual ChartField values and let the system determine if the new combination is valid. Otherwise the page is display only and you can only review the ChartField values.

If there is no combination code entered on the transaction page, all ChartField values are blank on the detail page and you can enter the specific ChartFields required.

> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Search Options

Select from the available options to search for an existing ChartField combination. The options available include the following, depending upon the combination code tables that you have set up:

- *Combination Codes*

  This option is available if you populated the Valid Combination table (VALID_COMBO_TBL).

- *Speed Types*

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This option is available if you imported SpeedType values from PeopleSoft General Ledger.

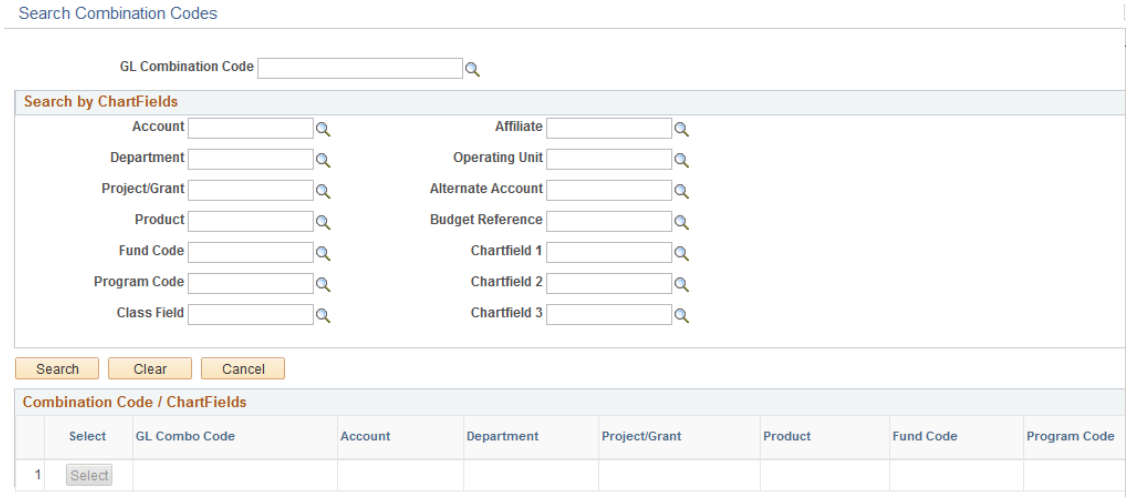
Search Combination Codes Page

Use the Search Combination Codes page (HMCF_VLD_CMBO_SRCH) to search for ChartFields using valid combination codes.

Navigation:

Select the **Combination Codes** search option and click the **Search** button on the ChartField Details page.

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



> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code:

1. Enter individual ChartField values.

   The system finds all ChartField combination codes that match those ChartField values.

2. Select the combination code that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

Search Speed Types Page

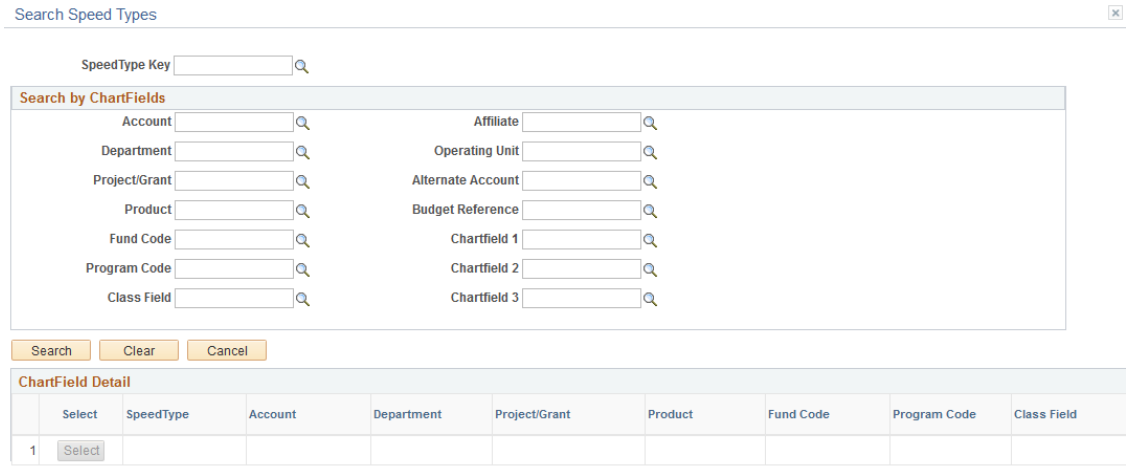
Use the Search Speed Types page (HMCF_SPD_TYP_SRCH) to search for ChartFields using PeopleSoft Financials Speed Types.

Navigation:

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Select the **Speed Types** search option and click the **Search** button on the ChartField Details page.

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



> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code using Speed Type:

1. Enter individual ChartField values.

   The system finds all speed types that match those ChartField values.

2. Select the speed type that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

3. Since this is selected from speed types, you might have to enter additional ChartField values to form a valid ChartField combination.

Editing ChartField Combinations in HCM Fluid Transactions

These topics provide an overview of ChartField validation and discuss editing ChartField combinations when using Fluid interface.

Pages Used to Edit ChartField Combinations in HCM Fluid Transactions

Page Name	Definition Name	Usage
ChartField Details Page	HMCF_CHARTFLD_FLU	Enter or review ChartFields or combination codes in PeopleSoft HCM transactions.

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Page Name	Definition Name	Usage
Search Combination Codes Page	HMCF_CF_SEARCH_FL	Search for ChartFields using valid combination codes.
Search Speed Types Page	HMCF_CHARTFLD_FLU	Search for ChartFields using PeopleSoft Financials Speed Types.
Search Combo Codes Page	HMCF_CMBO_CD_SRCH	Select ChartFields individually or search for valid chartfield combinations already used in transactions.

Understanding ChartField Validation

Any HCM transaction page on which you enter a ChartField combination code accesses a common ChartField Details page (HMCF_HRZNTL_CFLD) where you enter or view the ChartField details associated with the combination code. If you enter a new ChartField combination, the system performs a combination code validation process to ensure that the entered combination is valid.

The system uses one of these validation methods:

- If you integrate with PeopleSoft Financials 8.58 or higher, the system uses the COMBO_CF_EDIT_REQUEST and COMBO_CF_EDIT_REPLY service operations to validate the combination with the Financials database.
- If you do not integrate with PeopleSoft Financials 8.4.01 (Please correct the version)or higher and you populated the Valid Combination table (VALID_COMBO_TBL) with valid combinations, the system searches the Valid Combination table to find the ChartField combination that matches the individual ChartField values specified.
- If you do not integrate with PeopleSoft Financials 8.4 or higher and you did not populate the Valid Combination table, the system assumes the combination of ChartFields that you selected is valid and searches the Transaction table to find the match.

  If it finds a match, it uses the corresponding combination code. If it does not find a match, it generates a combination code using the next available number.

> **Note**
>
> The effective date of the newly created combination code is the current date. If the effective date of the transaction is earlier than this date, you need to modify the effective date of the newly created combination code so that it will be a valid code for the transaction from which you created it.

ChartField Details Page

Use the ChartField Details page (HMCF_CHARTFLD_FLU) to enter or review ChartFields or combination codes in PeopleSoft HCM transactions.

Navigation:

Click the **ChartField Details** or **Edit ChartFields** link or button on Time and Labor ChartField enabled pages.

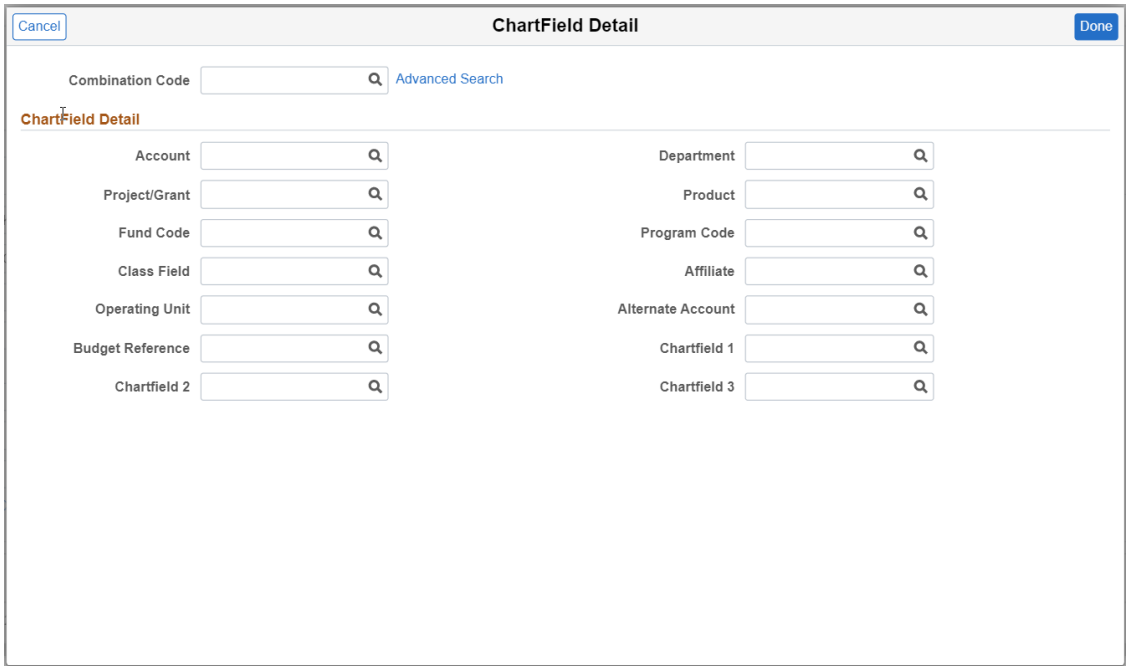
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For more information, refer PeopleSoft Time and Labor: Enter Time Page for Elapsed Time Reporter

The following video gives an overview of Fluid ChartFields:

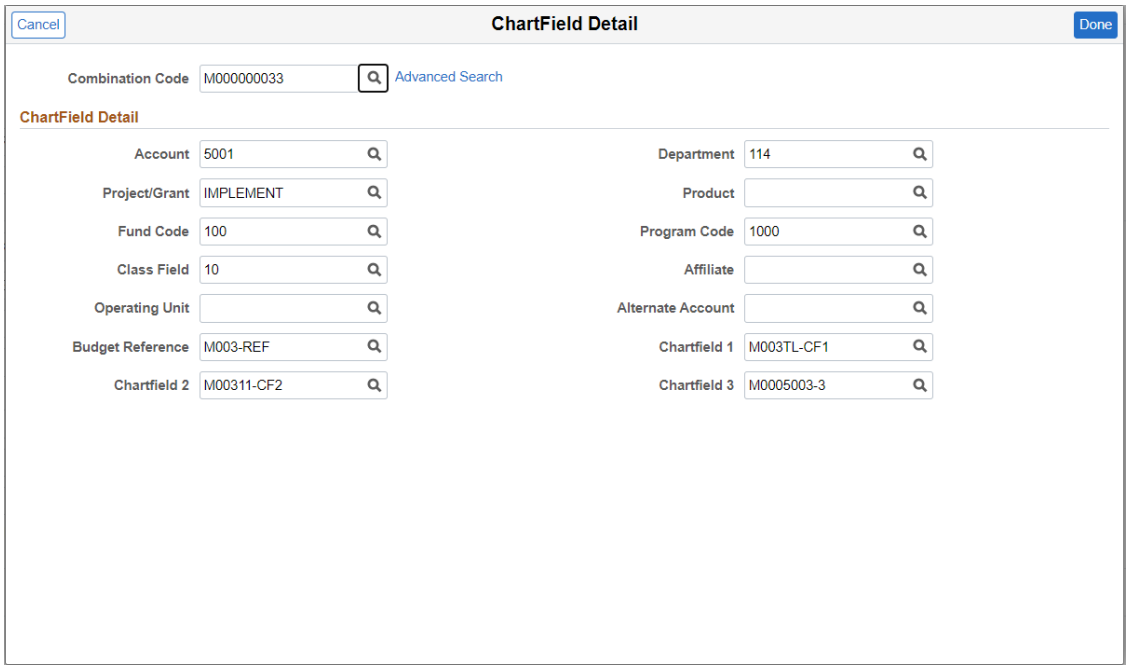
Video: Image Highlights, PeopleSoft HCM Update Image 35: Fluid ChartFields.

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



The **Advanced Search** link allows you to search for more options.

This example illustrates the fields and controls on the ChartField Detail with combination code.



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> **Note**
>
> This page might have a more specific name, depending upon the transaction page from which you access it.

If the combination code is already entered on the transaction page, this detail page displays the associated ChartField values. If you are in correction mode or in a new effective dated row on the transaction page, then you can make changes to individual ChartField values and let the system determine if the new combination is valid. Otherwise the page is display only and you can only review the ChartField values.

If there is no combination code entered on the transaction page, all ChartField values are blank on the detail page and you can enter the specific ChartFields required.

> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Search Options

Select from the available options to search for an existing ChartField combination. The options available include the following, depending upon the combination code tables that you have set up:

- *Combination Codes*

  This option is available if you populated the Valid Combination table (VALID_COMBO_TBL).

- *Speed Types*

  This option is available if you imported SpeedType values from PeopleSoft General Ledger.

Search Combination Codes Page

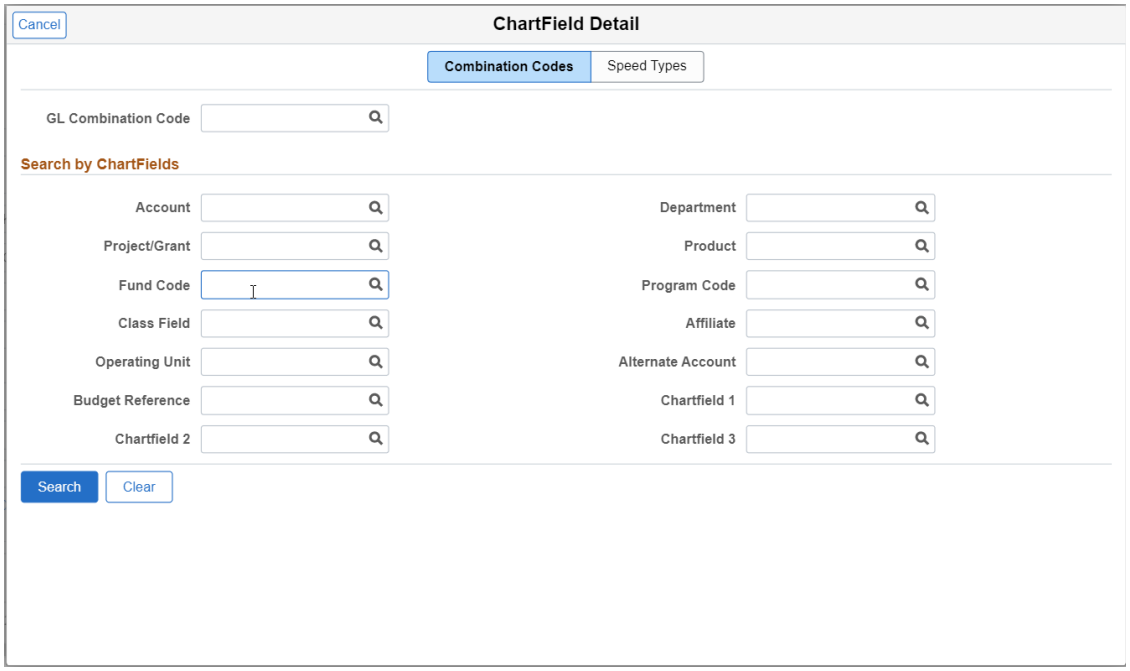
Use the Search Combination Codes page (HMCF_CF_SEARCH_FL) to search for ChartFields using valid combination codes.

Navigation:

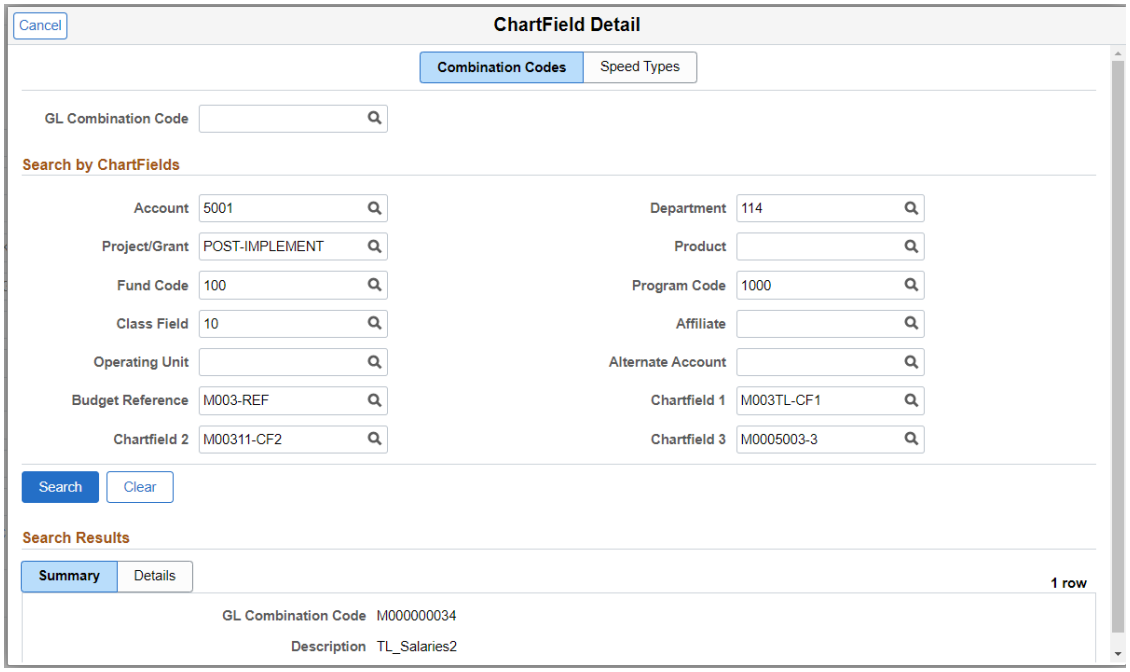
Select the **Combination Codes** search option and click the **Search** button on the ChartField Details page.

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

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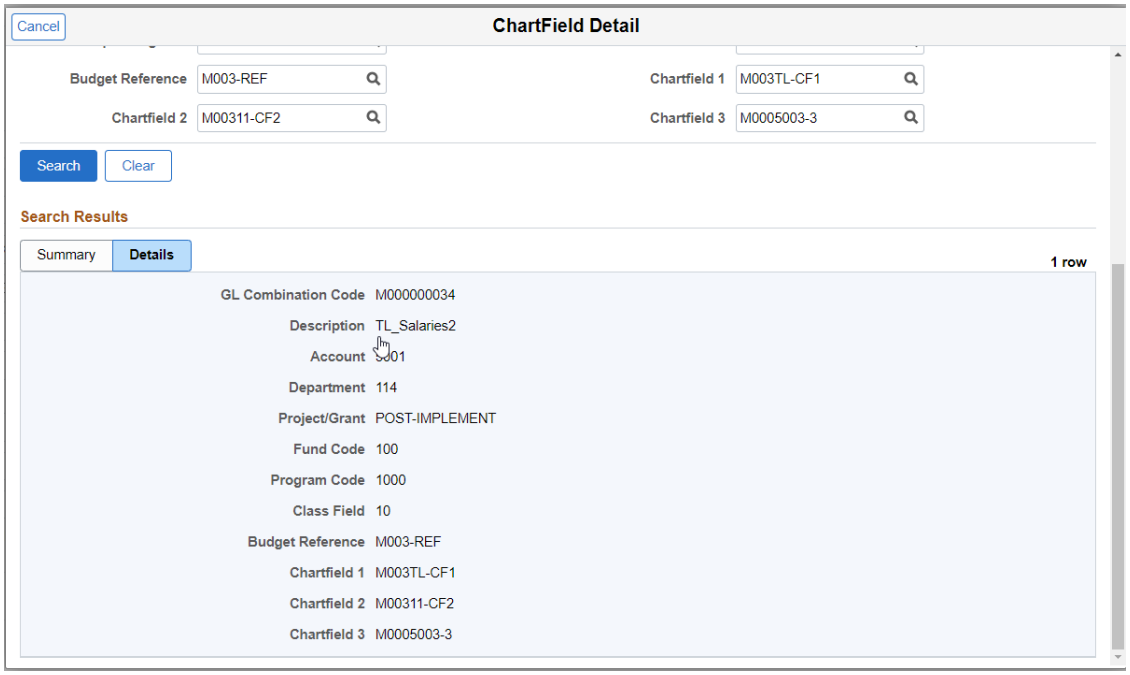


This example illustrates the fields and controls on the Combination Code Details_Summary tab.



This example illustrates the fields and controls on the Combination Code_Details tab.

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> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code:

1. Enter individual ChartField values.

   The system finds all ChartField combination codes that match those ChartField values.
2. Select the combination code that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

Search Speed Types Page

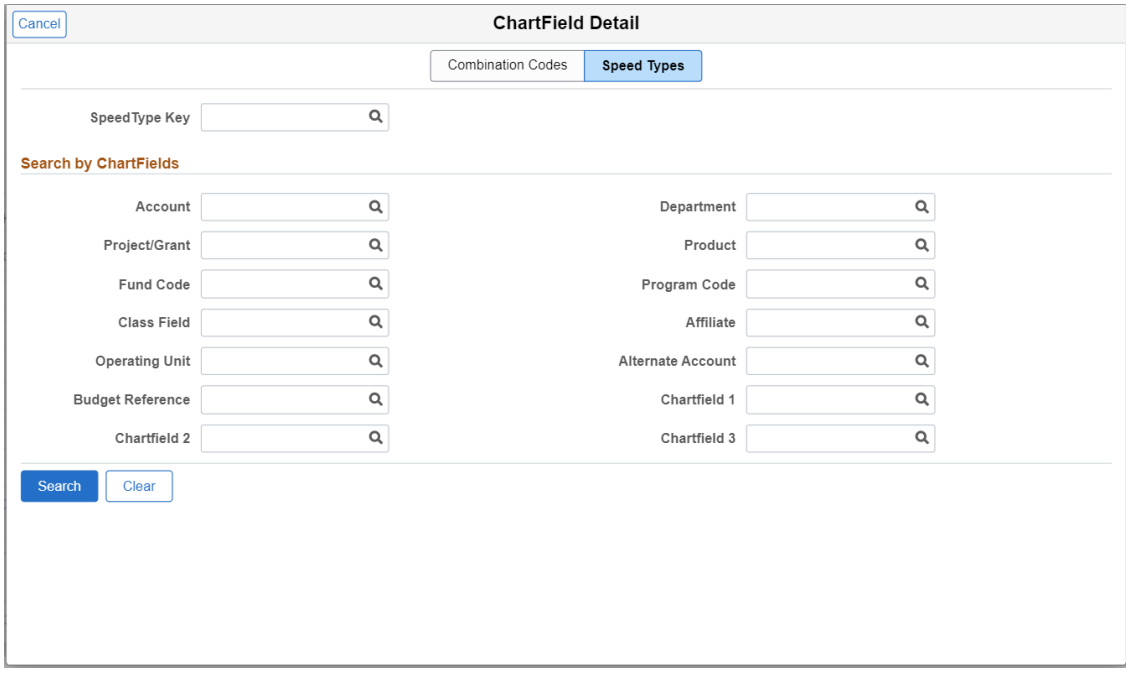
Use the Search Speed Types page (HMCF_CHARTFLD_FLU) to search for ChartFields using PeopleSoft Financials Speed Types.

Navigation:

Select the **Speed Types** search option and click the **Search** button on the ChartField Details page.

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

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> **Note**
>
> Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code using Speed Type:

1. Enter individual ChartField values.

   The system finds all speed types that match those ChartField values.

2. Select the speed type that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

3. Since this is selected from speed types, you might have to enter additional ChartField values to form a valid ChartField combination.

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19

Setting Up Local Country Functionality

Understanding Local Country Functionality Setup

If you're administering a local or multinational workforce, you must set up certain tables that are referenced in the core control tables to support local country requirements. Do this before you set up core control tables, such as for pay groups, or define companies, locations, departments, and job codes.

(CHE) Maintaining Swiss Postal Codes

To maintain Swiss postal codes, use the Load Postal Codes CHE component (POSTAL_LOAD_CHE).

These topics provide an overview of Swiss postal code maintenance and discuss how to update Swiss valid addresses.

Page Used to Maintain Swiss Valid Addresses

Page Name	Definition Name	Usage
Load Postal Codes CHE Page	POSTAL_LOAD_CHE	Load Swiss postal code information into the Valid Addresses table.

Understanding Swiss Postal Code Maintenance

To update postal codes:

1. Download the latest update of postal codes from the website of the Swiss Post and note the path to the file in which you save it.
2. Download the latest update of alternate names from the website of the Swiss Post and note the path to the file in which you save it.
3. Use the Load Postal Codes CHE page to enter the file paths and load the valid addresses and alternate names files to the Valid Addresses table.

The system uses the information on the Valid Addresses table to validate municipalities against the postal code.

Load Postal Codes CHE Page

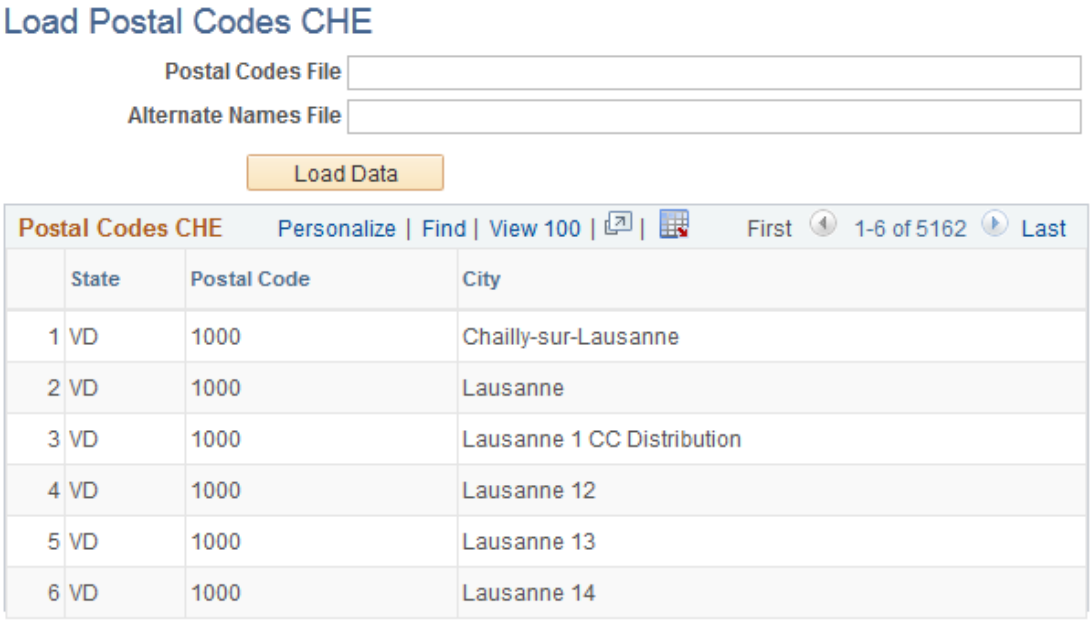
Use the Load Postal Codes CHE page (POSTAL_LOAD_CHE) to load Swiss postal code information into the Valid Addresses table.

Navigation:

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Set Up HCM, and then **Install**, and then **Country Specific**, and then **Load Postal Codes CHE**, and then **Load Postal Codes CHE**

This example illustrates the fields and controls on the Load Postal Codes CHE page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Postal Codes File	Enter the complete path to the Postal Code file that you downloaded from the Swiss Post.
Alternate Names file	Enter the complete path to the Alternate Names file that you downloaded from the Swiss Post.
Load Data	Click to load the postal code data into the Valid Addresses table.
State, Postal Code, and **City**	Initially, these fields display the current data from the Valid Addresses table. After you run the load process, the updated information appears.

(DEU) Setting Up the German Control Table

To set up German industrial inspection codes, use the Industrial Inspection component (IDUST_INSPEC_GER).

This topic discusses how to set up German industrial inspections codes.

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Page Used to Set Up German Industrial Inspection Codes

Page Name	Definition Name	Usage
Industrial Inspection Page	INDUST_INSP_GER	Set up German industrial inspection codes that you associate with locations in your organization.

Industrial Inspection Page

Use the Industrial Inspection page (INDUST_INSP_GER) to set up German industrial inspection codes that you associate with locations in your organization.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data DEU**, and then **Industrial Inspection**, and then **Industrial Inspection**

Industrial inspection codes aren't effective-dated and have no status.

Field or Control	Description
City	Specify the city that is associated with this industrial inspection code according to the German Berufsgenossenschaft.

(ITA) Setting Up Italian City Codes

To set up Italian city codes, use the Load Cities ITA component (RUNCTL_CITYUPDATE).

This topic lists the page used to load Italian city data.

Page Used to Load Italian City Data

Page Name	Definition Name	Usage
Load Cities ITA Page	RUNCTL_CITYUPDATE	Run the ITA City Update process to update Italian city data after downloading the city code data file from the Ministero delle Finanze.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Understanding Country-Specific Table Setup
- PeopleSoft Human Resources Administer Workforce: (ITA) Setting Up Italian Workforce Tables

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(JPN) Setting Up Japanese Control Tables

To set up Japanese control tables, use the Define Postal Code JPN component (POSTAL_CODE_TBL), the Education Level component (EDLVLAG_TBL_JPN), and the Calculation Rules Settings component (SETUP_SALCOMP_JPN).

These topics provide an overview of education level age and discuss setting up Japanese tables.

Pages Used to Set Up Japanese Control Tables

Page Name	Definition Name	Usage
Education Level Page	EDLVLAG_TBL_JPN	Set up your company's education level age bases.
Calculation Rule Settings Page	SETUP_SALCOMP_JPN	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.
Load Postal Codes JPN Page	RUNCTL_POSTAL_JPN	Import Postal Code CSV files provided by Japan Post.
Define Postal Codes JPN Page	POSTAL_TBL_JPN	Enter information to maintain Japanese postal codes or add data that did not import as expected.

Understanding Education Level Ages

The Education Level Age Table enables you to link highest education levels—already in the system—to what we call the Education Level Age Basis (as of hire). The system uses the Education Level Age Basis in the calculation of a worker's Education Level - Adjusted Birth Date, which is in turn used in the calculation of a worker's Education Level Age at any point in time. The system uses a worker's Education Level Age in education level age-related pay calculations. Education level age-related pay is a form of seniority pay.

Calculating a Worker's Education Level Age

This topic discusses how the system uses the Education Level Age Basis in the eventual determination of a worker's education age-related pay. This topic uses many acronyms, so here's a quick reference:

Acronym	Meaning
ELABa	Education Level Age Basis (as of Hire)
AELABa	Adjusted Education Level Age Basis (as of Hire)
ELABi	Education Level - Adjusted Birth Date
SCB	Standard Calculation Birthday
CSD	Company Seniority Date
ELA	Education Level Age

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Company A has set the Education Level Age Basis (ELABa) for four years of college at 22. The company also set the Standard Calculation Birthday (SCB)—the anniversary for incrementing years of service—to April 1.

Hiroshi was born on February 6, 1972 and graduated after four years of college on March 23, 1994 at age 22. He then spent two years travelling around the world. Company A hired him on June 1, 1996. He is not hired on April 1 because he didn't get back from his travels until May 1996. At the time he is hired, he is 24 years old.

For the purpose of calculating Hiroshi's education age-related pay, each year the system needs to calculate Hiroshi's Education Level Age. It will use his Education Level - Adjusted Birth Date to do this.

In calculating a worker's ELABi, the system uses the ELABa, the Company Seniority Date (CSD), and the company's SCB.

The relationship between the worker's CSD and the company's SCB may result in an adjustment to the worker's ELABa, called the Adjusted Education Level Age Basis or AELABa. If the month/day of a worker's hire date (as determined by the CSD field) is after the company's SCB (that is, CSD is greater than SCB), the worker's ELABa is decreased by 1.

In Hiroshi's case, because his June 1 month/day hire date (also his CSD) falls after the company's April 1 SCB, his ELABa is decreased by 1. If he had been hired on or before April 1, there would be no adjustment to his ELABa.

This is how to get Hiroshi's AELABa:

- Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
- Using this -1 you get:

  ELABa – 1 = AELABa

  Which in Hiroshi's case is:

  22 – 1 = 21

The system now uses the AELABa (21) to determine Hiroshi's ELABi year.

This formula is:

Year of Hire – AELABa = ELABi (year)

or

1996 – 21 = 1975

So for education age-related pay calculations, Hiroshi's ELABi is April 1, 1975, the combination of the company's SCB month/day and Hiroshi's ELABi year (remember, he was born February 6, 1972).

Now we can look at how important that ELABi is.

One year later, 1997, the system needs to know Hiroshi's ELA. This is the calculation:

SCB (including Year of Calculation) – ELABi = ELA

or

April 1, 1997 – April 1, 1975 = 22

This is the same ELA as a graduate who started with the company immediately after college. This set of calculations has, then, effectively adjusted Hiroshi's ELA, upon which education age-related pay is based, to take into account the two years that he spent traveling and the fact that he started work after the company's SCB.

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> **Note**
>
> If your company considers that the lapse of two months from April to June is not significant, you can adjust Hiroshi's ELABi from April 1, 1975 to April 1, 1974. Then, for the same 1997 calculation, Hiroshi's ELA is 23 (April 1, 1997 to April 1, 1974), the same as a new graduate who has worked for one year.

Related Topics

- PeopleSoft Human Resources Administer Compensation: Understanding the Update Seniority Pay Process
- PeopleSoft Human Resources Administer Compensation: Administering Seniority Pay

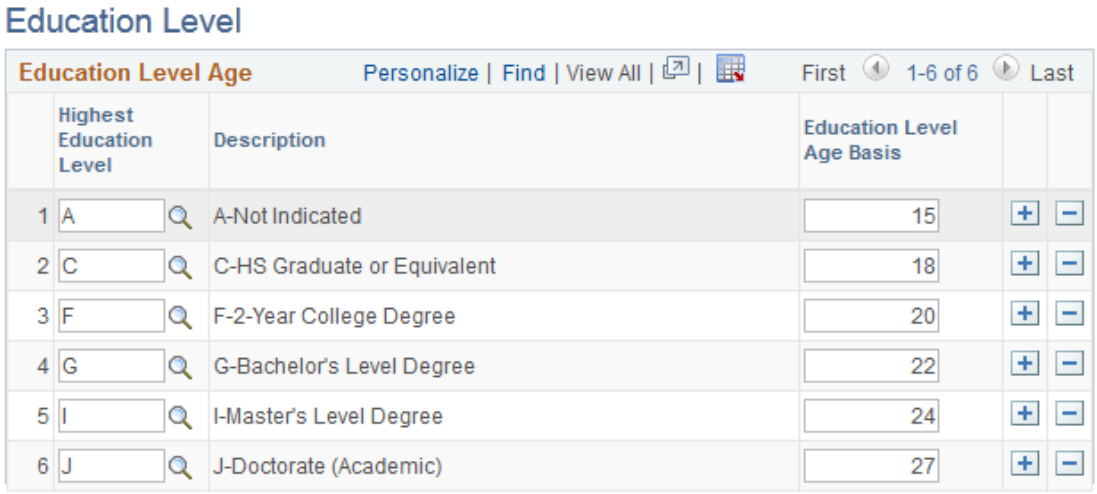
Education Level Page

Use the Education Level page (EDLVLAG_TBL_JPN) to set up your company's education level age bases.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data JPN**, and then **Education Level**, and then **Education Level**

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



The system uses these age bases in the calculation of a worker's Education Level-Adjusted Birth Date, which is, in turn, used in the calculation of the worker's Education Level Age and education level age-related pay.

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Field or Control	Description
Education Level Age Basis	This is the value you associate with the **Highest Education Level** that you selected in the first field. The system uses this in calculating a worker's Education Level-Adjusted Birth Date, which is used in the calculation of a worker's education level age.

> **Note**
>
> The **Highest Education Level** values are translate values from the Highest Education Level table. You access the table to put workers' highest education levels on their Personal History page in Personal Information. If you change any of these translate values (inactivate them, for example), you will need to change any worker records that were using the value to use another value. If you add a translate value and you want to associate an education level age basis with it, you must also add it to this page and allocate an **Education Level Age Basis** to keep it synchronized with the Highest Education Level table. If you don't add it, and you use the new **Highest Education Level** value—in Personal Data, Personal Profile, for example—the system will not be able to calculate the worker's Education Level - Adjusted Birth Date (it will remain blank). Consequently, the system will not be able to calculate the worker's Education Level Age.

Calculation Rule Settings Page

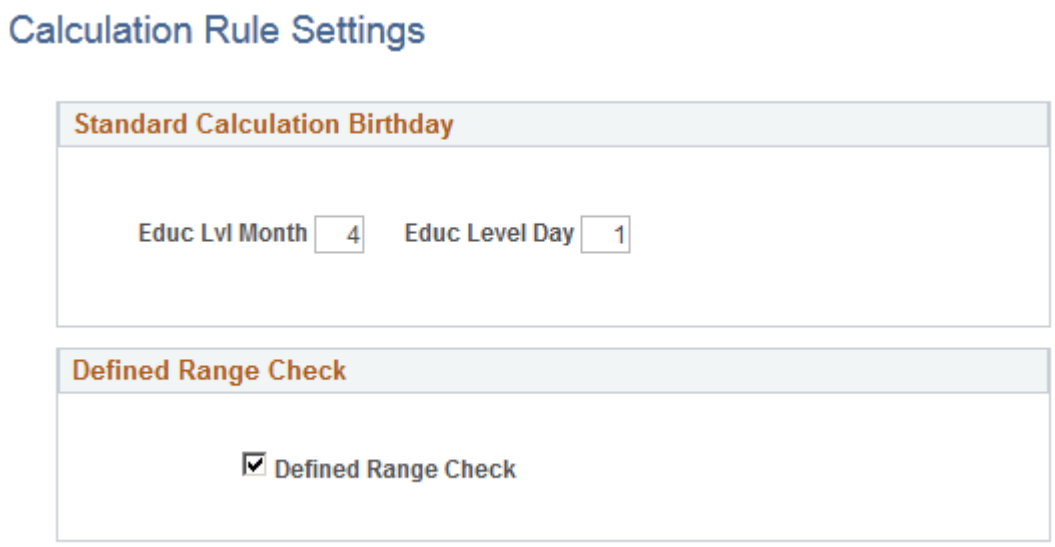
Use the Calculation Rule Settings page (SETUP_SALCOMP_JPN) to establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data JPN**, and then **Calculation Rule Settings**, and then **Calculation Rule Settings**

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

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Standard Calculation Birthday

This is the single date, or anniversary, on which your workers' education level ages increment by one.

Field or Control	Description
Educ Lvl Month (education level month)	Enter the month, where January = 1, February = 2 and so on. This sets the month of your organization's Standard Calculation Birthday, the date on which all workers' company years of seniority increment by one year. It is used in the calculation of each worker's Education Level Age.
Educ Level Day (education level day)	This is the day of the month of the Standard Calculation Birthday. For example, **Month** 4, **Day** 1 sets the Standard Calculation Birthday as April 1.
Defined Range Check	Select to ensure the system checks that any record added to a Job Data - Compensation page with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table. The check applies to both a manually added record and an automatically added record. Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on a worker's Compensation page.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Compensation Page

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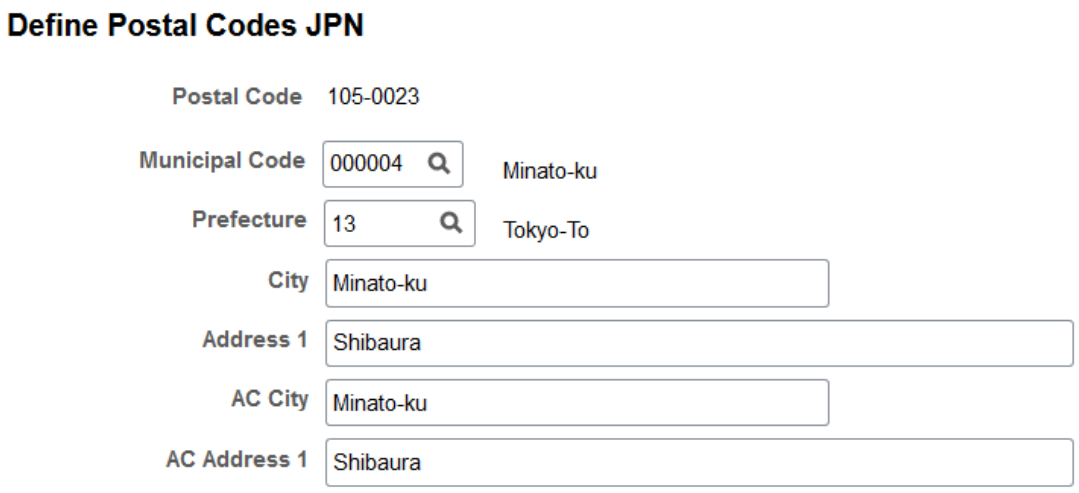
Load Postal Codes JPN Page

Use the Load Postal Codes JPN page (RUNCTL_POSTAL_JPN) to import Postal Code CSV files provided by Japan Post.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **Load Postal Codes JPN**, and then **Load Postal Codes JPN**

This example illustrates the fields and controls on the Load Postal Codes JPN page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Before using this page, you must download and extract the CSV file from Japan Post's website and post it to a FTP server located at your site. The CSV file must be encoded in Shift-JIS character set. You must define URL data in the PeopleTools Utilities menu before using this Load Postal Code process.

See Display and Print Page.

Field or Control	Description
URL Identifier	Select the FTP Uniform Resource Locator (URL) where the CSV file that contains the postal codes is located.
All Prefectures	Select this option to load postal data for all prefectures. **Note:** Because there are more than 120,000 postal codes rows, consider batch performance when importing all rows.
Selected Prefecture	Select this option to load postal codes for a specific prefecture.

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Load Results

If the length of Address1 or Address AC1 is more than 55 characters, the fields are left blank. Also, if the length of Address1 or Address AC1 is too long and divided into multiple rows, only the first row is imported and the rest of the rows are printed on the log reports as unimported rows.

If you want to remove "Not listed as below" as the Address 1 and AC Address 1, register these text strings in the Strings Table; the Program ID is HGJPPSTL. Set the text that you want to remove to *String Text* fields.

All rows might not appear when there are multiple rows for a single postal code with the same State, City, Address1, but different Address1_AC because of different pronunciation.

If expected data is not loaded, add it or edit it on the Define Postal Codes JPN page.

Postal Code Load Process Log Reports

After completion of this process, the system generates a process log report that lists the number of rows imported, the number of rows not imported, and a detailed reason for the latter. Possible reasons for not importing rows include:

- The import file was not found.
- The file is formatted incorrectly.
- The import file is for a different prefecture from the one specified in the **Selected Prefecture** field.

Define Postal Codes JPN Page

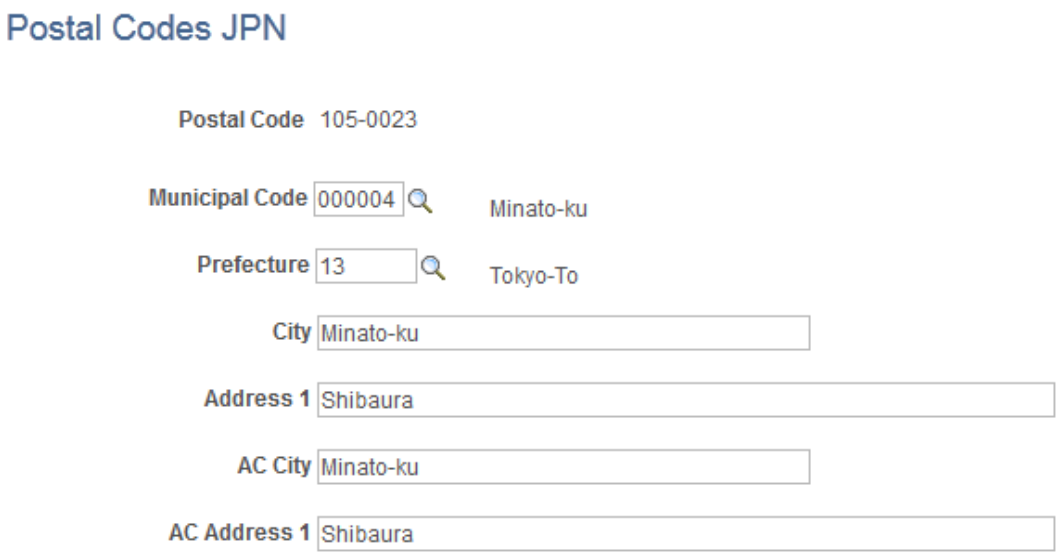
Use the Define Postal Codes JPN page (POSTAL_TBL_JPN) to enter information to maintain Japanese postal codes or add data that did not import as expected.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **Define Postal Codes JPN**, and then **Define Postal Codes JPN**

This example illustrates the fields and controls on the Define Postal Codes JPN page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Municipal Code	Enter the code for the Japanese municipality that this postal code belongs to.
Prefecture	Select the prefecture for this postal code from the list.

(NLD) Loading Dutch Postal Codes

To load Dutch postal codes, use the Postal Codes NLD component (RUN_POSTAL_NLD).

This topic discusses how to import Dutch postal codes.

Page Used to Load Postal Codes

Page Name	Definition Name	Usage
Load Postal Codes NLD Page	RUNCTL_POSTAL_NLD	Import postal codes into the NLD Postal Code JPN in your human resources system.

Load Postal Codes NLD Page

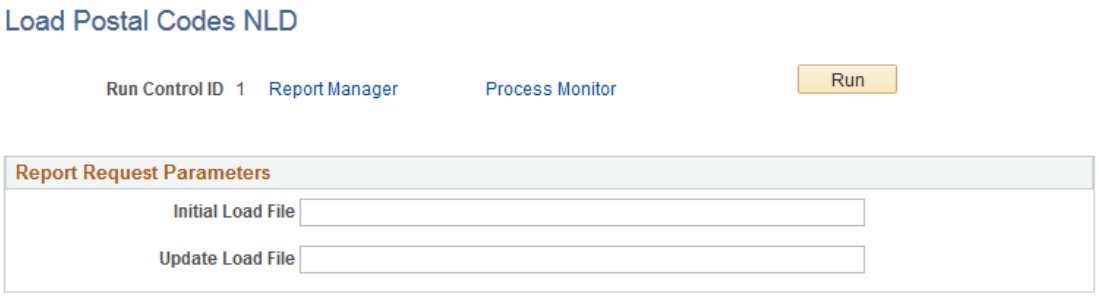
Use the Load Postal Codes NLD page (RUNCTL_POSTAL_NLD) to import postal codes into the NLD Postal Code JPN in your human resources system.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **Load Postal Codes NLD**, and then **Load Postal Codes NLD**

This example illustrates the fields and controls on the Load Postal Codes NLD page. You can find definitions for the fields and controls later on this page.

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The Dutch postal authority provides a postal code table to which you can subscribe. The Load Postal Code Table process loads all of the postal codes provided in a source file by the Dutch Post (TPG Post) into your human resources system.

Report Request Parameters

Field or Control	Description
Initial Load file	Enter the initial postal code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.
Update Load File	Enter the updated postal code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.
Run	Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

(ESP) Setting Up Spanish Control Tables

To set up Spanish control tables, use the Insurance Company Table component (INSUR_COMPANY_ESP) and the Industry Activity Table component (INDUSTRY_ACT_ESP).

If you do business in Spain, enter the information that is required by the Spanish government concerning your organization's primary industry activity and the insurance company that you use for workplace accidents or illnesses.

The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the work center number information to report worker information to the Spanish Social Security National Institute (Instituto Nacional de la Seguridad Social).

Pages Used to Set Up Spanish Control Tables

Page Name	Definition Name	Usage
Insurance Company Table Page	INSUR_COMP_CD_ESP	Enter information about your organization's insurance company.
Industry Activity Table Page	INDSTRY_ACT_CD_ESP	Define the codes that are needed by your organization.

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Related Topics

- PeopleSoft Human Resources Administer Workforce: (Classic) Adding Organizational Instances

(GBR) Setting Up National Insurance Prefixes for the U.K.

To set up national insurance prefixes for the UK, use the NID Prefix GBR (NID_PREFIX_GBR) component.

These topics provide an overview of and discuss setting up national insurance prefixes.

Pages Used to Set Up National Insurance Prefixes

Page Name	Definition Name	Usage
NID Prefix GBR Page	NID_PREFIX_GBR	View the existing NID prefixes.
NID Prefix Details Page	NID_PR_GBR_SEC	Set up a new NID prefix or change the status of an existing prefix.

Understanding National Insurance Prefixes

Starting in the tax year 2004/2005, the Inland Revenue requires that employers' year-end reporting contains valid national insurance prefixes only. Submissions with invalid national insurance prefixes will be rejected.

Use the delivered setup table to define valid national insurance prefixes. When you enter a person's national insurance code on the Biographical Details page, the system validates the prefix against this national insurance prefix table.

The format of national insurance numbers is defined on the National ID Type Table page, which is described in this documentation.

Related Topics

- Defining National ID Types
  To define national ID types, use the National ID Type component (NID_TYPE_TABLE).
- PeopleSoft Human Resources Administer Workforce: Biographical Details Page

NID Prefix GBR Page

Use the NID Prefix GBR page (NID_PREFIX_GBR) to view the existing NID prefixes.

Navigation:

Set Up HCM, and then **Install**, and then **Country Specific**, and then **NID Prefix GBR**, and then **NID Prefix GBR**

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

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By default, this page lists the NID prefixes that are active as of the current date. Click the NID prefix link to view and update the effective date and status of the selected NID prefix.

Field or Control	Description
Effective and **Status**	To display NID prefixes that are active as of a different date or to display NID prefixes with a different status, update the **Effective** field and/or the **Status** field and click the **Refresh** button
Refresh	Click to refresh the page. Use this button when you change the Effective or Status fields.
Add	Click to add a new NI prefix. The NID Prefix Details page appears.

NID Prefix Details Page

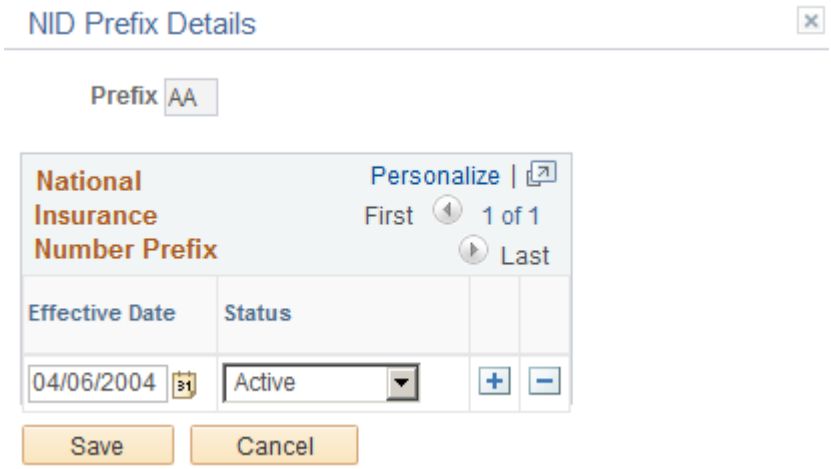
Use the NID Prefix Details page (NID_PR_GBR_SEC) to set up a new NID prefix or change the status of an existing prefix.

Navigation:

Click a **NI prefix** link or click the **Add** button on the NID Prefix GBR page.

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



Use this page to add a new NID prefix or change the status of an existing NID prefix. To change existing prefixes, add a new row.

Select the date that the prefix becomes *Active* or *Inactive* and select the status in the Status field.

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20

Setting Up and Working with Market Pay

Understanding Market Pay

These topics discuss:

- Market pay functionality.
- The market pay process flow.

Market Pay Functionality

Market Pay functionality in PeopleSoft Human Resources assists you in using salary survey data as a guide for awarding competitive compensation to your workers. Market pay is a range of compensation information, including the different elements of compensation such as base, variable, and total compensation which may vary by geography. With PeopleSoft Market Pay functionality, you can define market pay by geography.

When you use the market pay functionality, you can:

- Define geographic areas to relate finalized market data to workers.

  You can further distinguish geography by country, state, province, and city.
- Create a market pay matrix and associate it with one or multiple job codes.
- Upload data from existing salary survey tables into the market pay tables, which preserves the existing functionality.
- Import salary survey data from PeopleSoft Workforce Rewards if your organization licenses that application.
- Store conclusion market data in the form of a matrix.

The Market Pay Process Flow

Follow these steps to set up the market pay functionality:

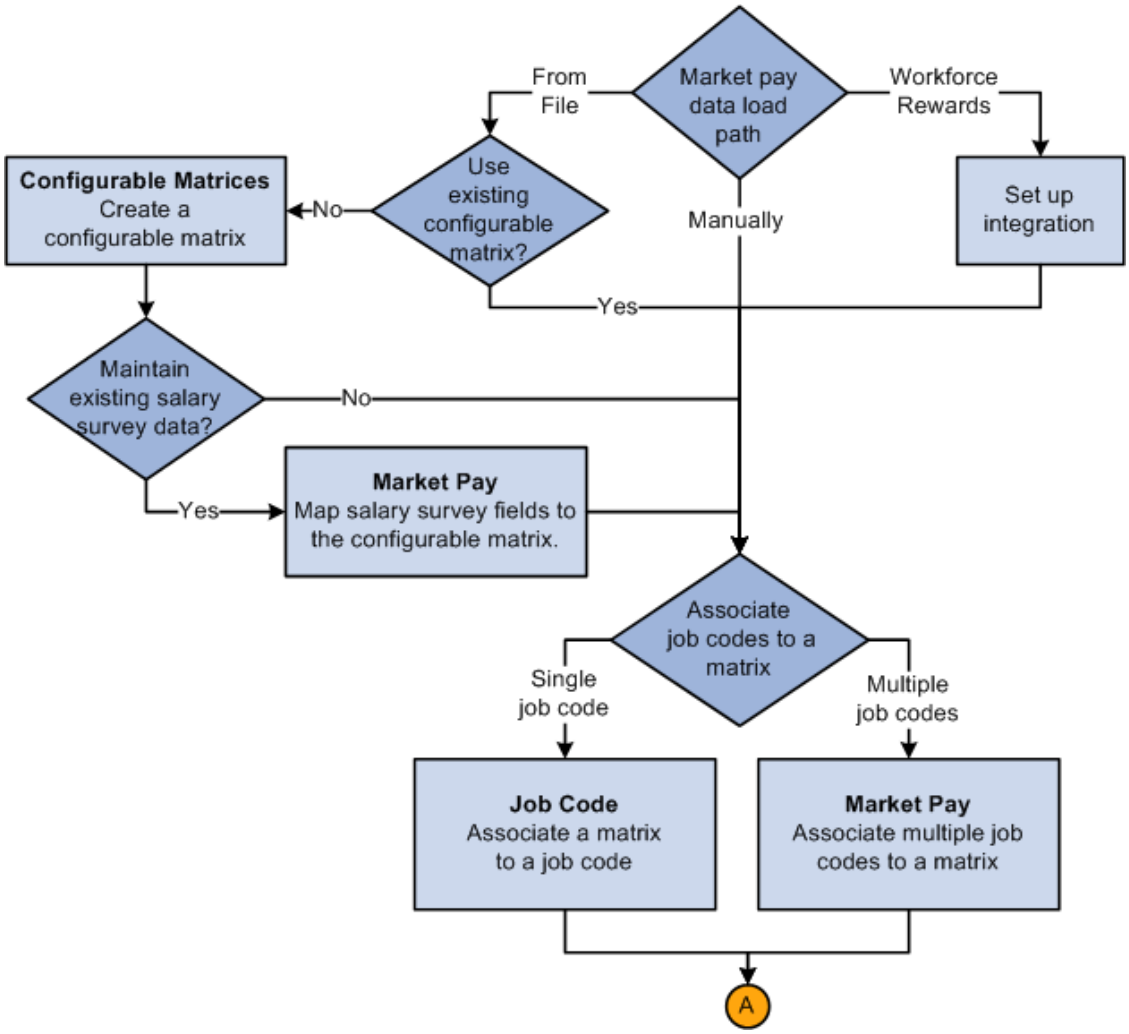
1. Define geographical areas.
2. Select an existing configurable market pay matrix, or create a new one.
3. (Optional) Map existing salary survey data fields to a configurable matrix definition.
4. Associate a market pay matrix with one job code on the Job Code - Market Pay Match page or to several job codes on the Associate Mkt Pay to Job Codes page.
5. Load market pay data by one of three methods:
   - Load data from file using an automated process.
   - Manually enter data.
   - (Workforce Rewards users only): Subscribe to message published from Workforce Rewards.

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Set up Integration Broker messaging to subscribe to the message published by Workforce Rewards.

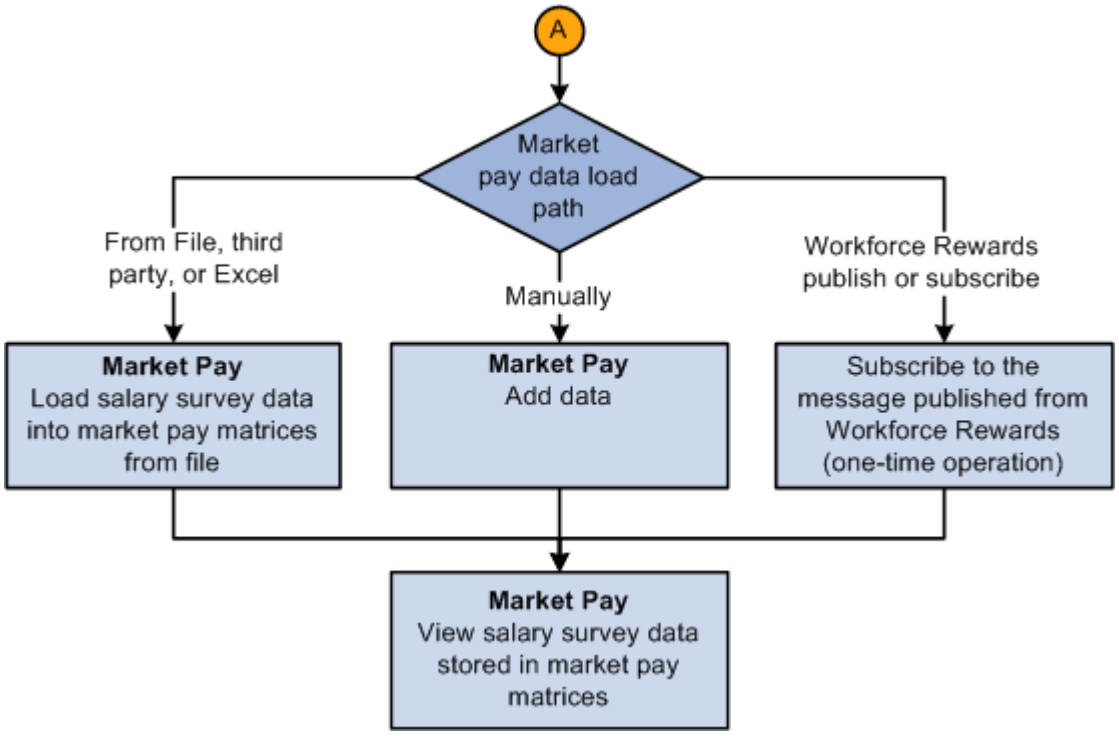
6. View market pay data online by job code.

This diagram illustrates creating a configurable matrix and associating job codes:



This diagram illustrates loading data into the market pay matrix:

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Prerequisites

These tasks are prerequisites to setting up and using market pay matrices:

1. Create job codes for jobs in your company.

   See Classifying Jobs.

2. Assign job codes to workers during the hiring process.

   See PeopleSoft Human Resources Administer Workforce: Understanding Job Data.

3. Conduct salary surveys and analyze salary data.

4. Set up the integration with Workforce Rewards if you plan to import salary data from that application using the COMP_MKT_RATE_SYNC Integration Broker message and service operation.

Setting Up Geographical Areas and Market Pay Matrices

To set up geographical areas and matrices, use the Define Geographical Areas (GEOGRAPHY_TBL) and Define Configurable Matrices (WCS_LK_TBL_DEFN) components.

These topics provide an overview and discuss setting up geographical areas and market pay matrices.

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Pages Used to Set Up Geographical Areas and Market Pay Matrices

Page Name	Definition Name	Usage
Define Geographical Areas Page	GEOGRAPHY_TBL	Define geographical areas by city, state, province, and country. Use these areas to organize market pay data.
Matrix Definition Page	WCS_LK_TBL_DEFN	Set up a market pay matrix definition.
Inputs Page	WCS_LK_TBL_INPUTS	Define inputs for market pay surveys.
Outputs Page	WCS_LK_TBL_OUTPUTS	Define outputs for market pay surveys.
Search Keys Page	WCS_LK_TBL_KEYS	Specify the search keys to be used to match worker data used in market pay surveys.
Load Configurable Matrix Keys Page	WCS_LK_TBL_KEY_SEC	Automatically load search keys for specific sources using a prompt table.
Data Content Page	WCS_LK_TBL_DATA	View or enter values for the output data.
View Page	WCS_LK_TBL_VIEW	View the matrix as of the *last* saved version.

Understanding Market Pay Matrices

The PeopleSoft application delivers these matrices:

- MARKET_PAY
- WFR_SURVEY_DATA

  The system uses this matrix if you import salary data from the Workforce Rewards application.

You can set up additional configurable matrices to include market pay survey data.

> **Note**
>
> If you have maintained survey matches in PeopleSoft, you can continue to do so by selecting the delivered Market Pay matrix or by creating a new matrix with fields such as Survey Provider and Survey Job Code. These fields enable you to create ad hoc survey participation reports at any time. You create the reports based on the requirements of your survey providers.

Related Topics

- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Understanding Configurable Matrices

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Define Geographical Areas Page

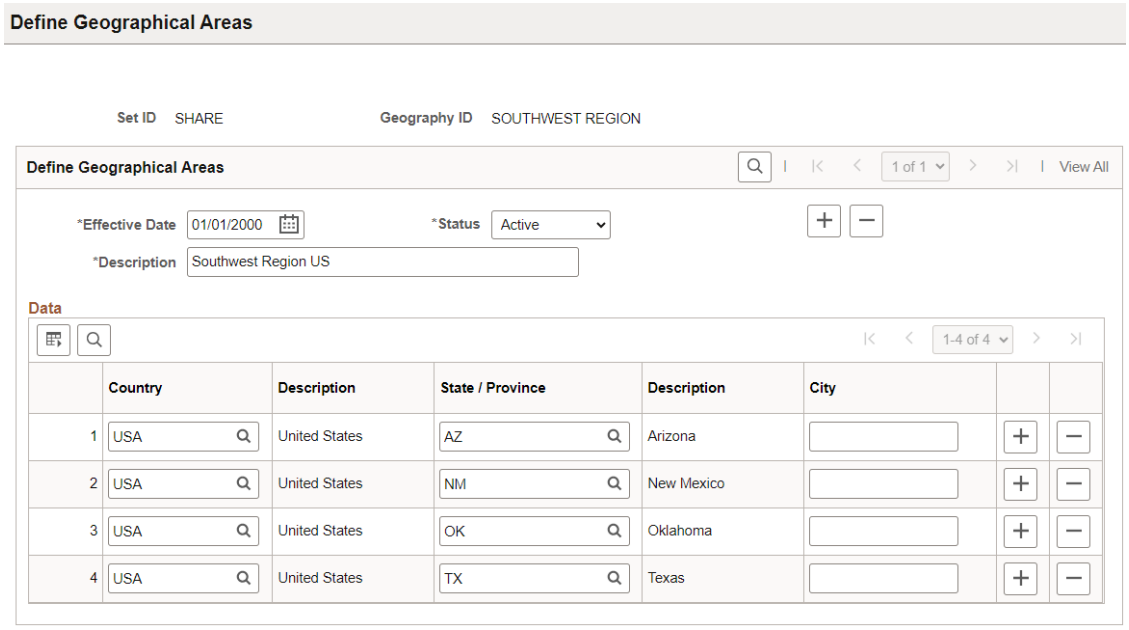
Use the Define Geographical Areas page (GEOGRAPHY_TBL) to define geographical areas by city, state, province, and country.

Use these areas to organize market pay data.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Market Pay**, and then **Define Geographical Areas**, and then **Define Geographical Areas**

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



You can enter a geography as broad as an individual country, or you may target a specific country, state, province, or city. You can have one or more rows of country, state, province, or city data. However, you cannot list the same combination of country, state, province, or city within the same geographical area.

> **Warning**
>
> Use care when listing the same combination of country, state, province, or city in different geographies, as this may result in conflicting information when combined with worker data.

Field or Control	Description
Effective Date	You may change geographic definitions.
Status	Select *Active* or *Inactive.*

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Field or Control	Description
Description	Enter your company-defined name.
Country and **State / Province**	Select a value from the available listing.
City	Enter the name of the specific city. The spelling is not validated so you must enter the name with capitalization and punctuation.

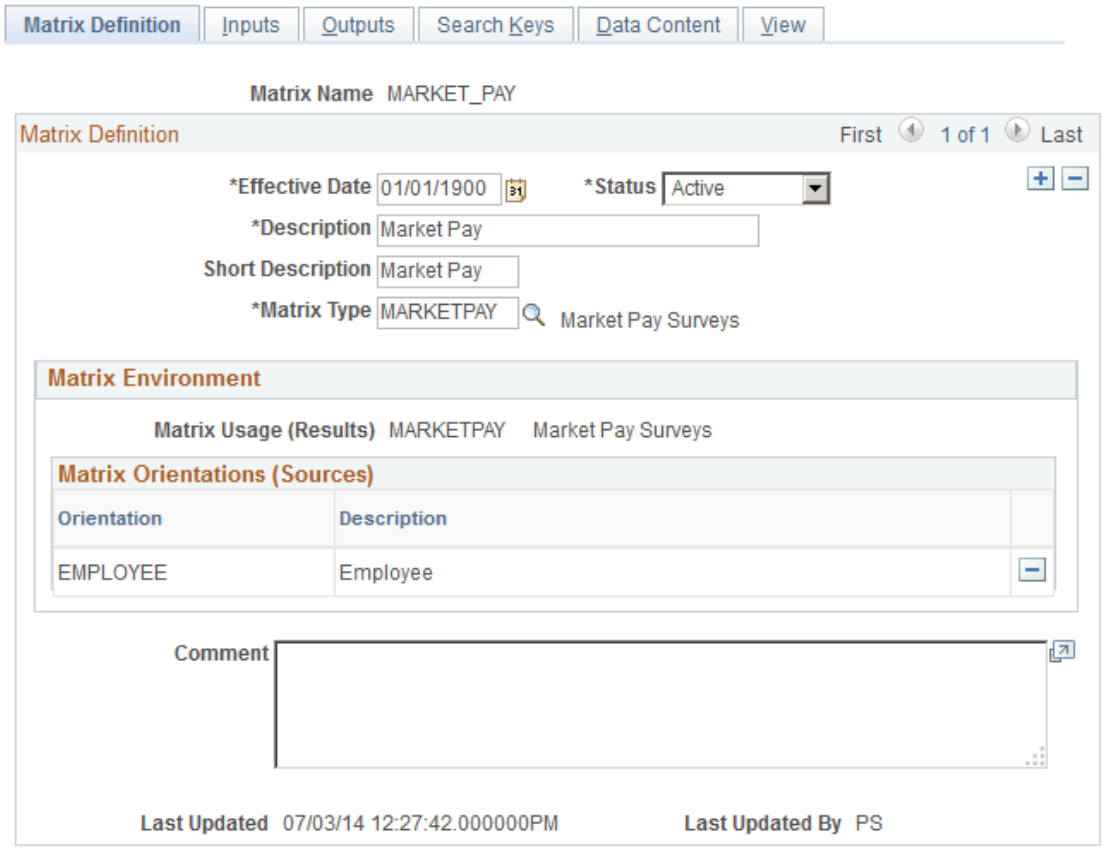
Matrix Definition Page

Use the Matrix Definition page (WCS_LK_TBL_DEFN) to set up a market pay matrix definition.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **Matrix Definition**

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



Field or Control	Description
Effective Date	Enter a date that is equal to or less than the date you want to link it to one or more job codes.

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Field or Control	Description
Status	Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to Active in order to use the matrix.
Matrix Type	Select *MARKETPAY*.

Inputs Page

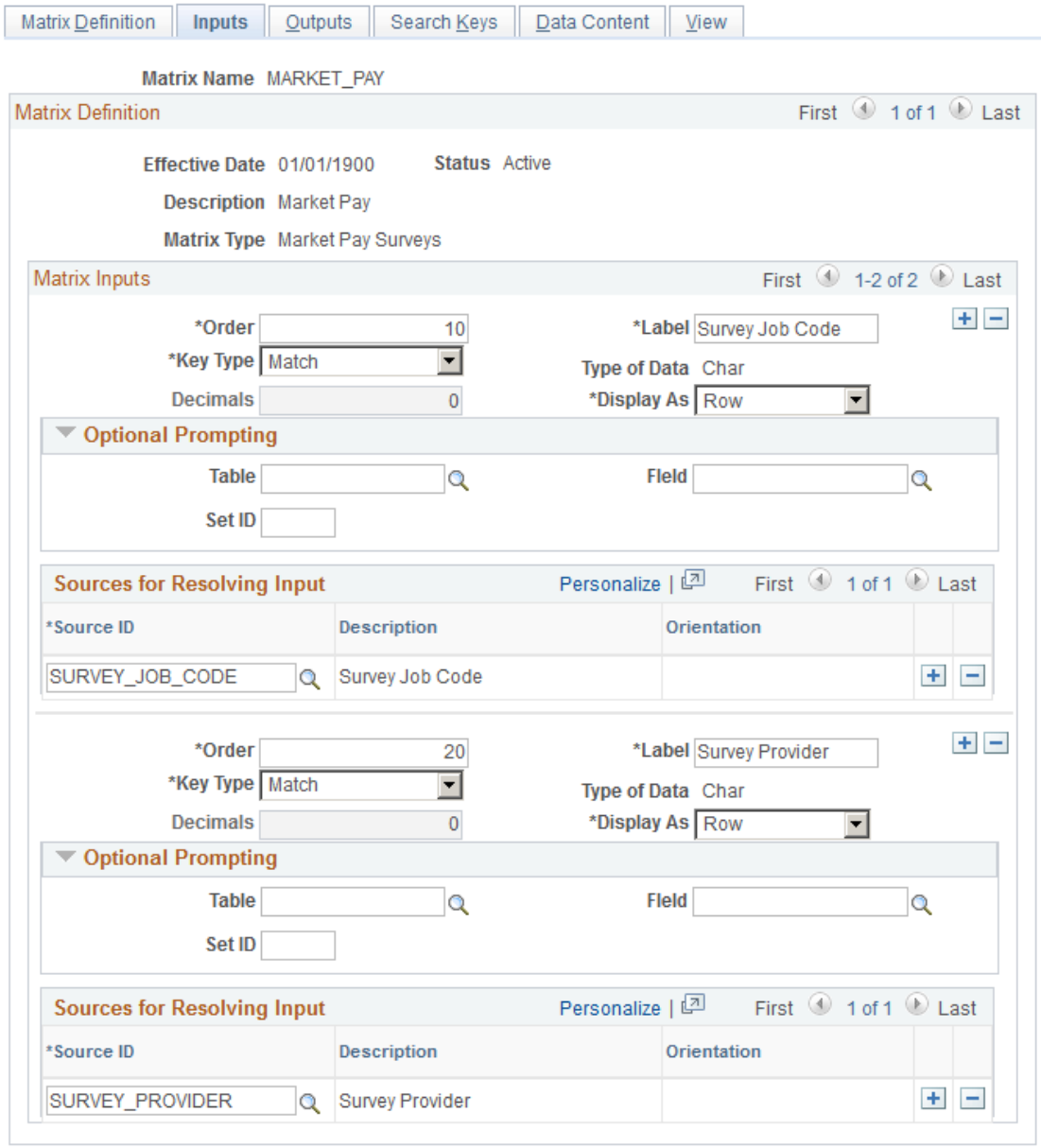
Use the Inputs page (WCS_LK_TBL_INPUTS) to define inputs for market pay surveys.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **Inputs**

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

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Optional Prompting

If you specify GEOGAREA as the source ID, you can enter prompt values in this group box. Enter GEOGRAPHY_TBL as the table and GEOGRAPHY_ID as the field. There is no automatic validation of key values for geographical areas.

Sources for Resolving Input

Field or Control	Description
Source ID	Select the source for the market pay data. The maximum number of inputs for each matrix is 15. Common types of inputs include: • Geographical Area • Survey Provider • Survey Job Code

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Related Topics

- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Predefined Source IDs
- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Predefined Result IDs
- PeopleSoft Human Resources Manage Base Compensation and Budgeting: Source Definition Page (GEOGRAPHY Source Type)

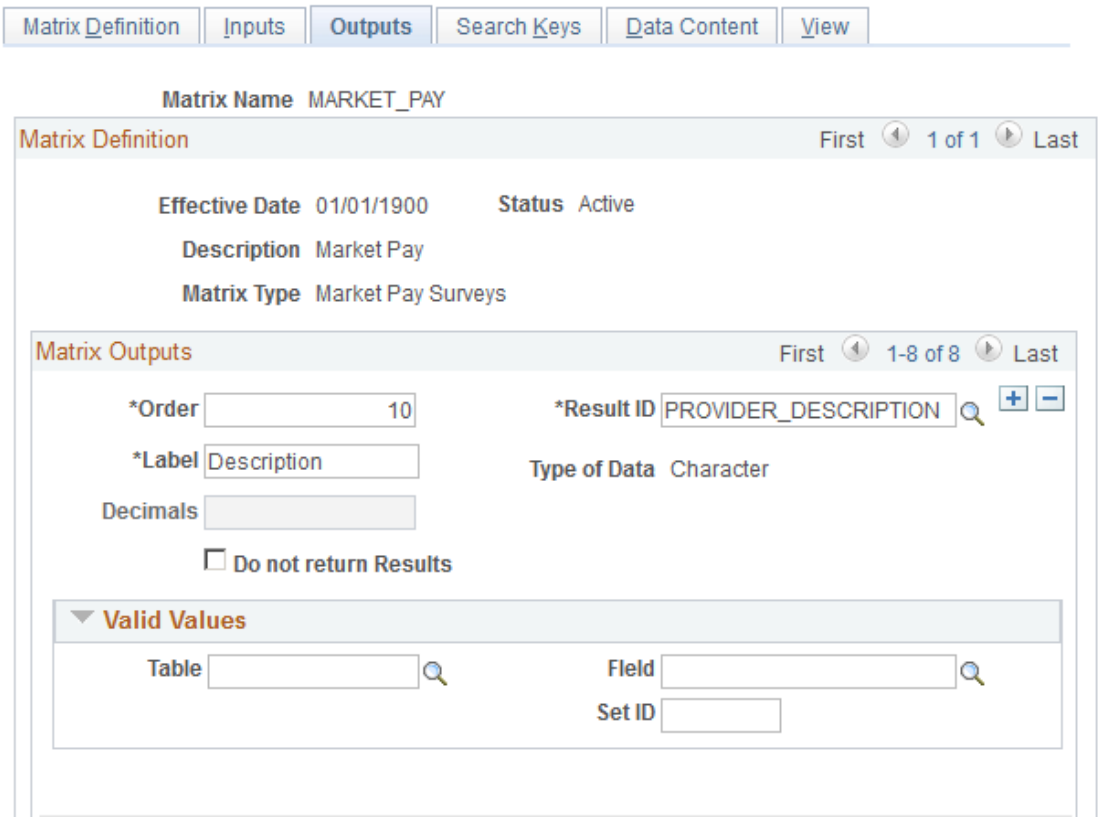
Outputs Page

Use the Outputs page (WCS_LK_TBL_OUTPUTS) to define outputs for market pay surveys.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **Outputs**

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



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Field or Control	Description
Result ID	Select an output for the market pay matrix. Typical outputs include currency, base, variable, and total compensation. You can have a maximum of 30 outputs for each matrix. These system-delivered values have default names, however, you can edit them to the label that best suits your business. See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Predefined Source IDsPeopleSoft Human Resources Manage Base Compensation and Budgeting: Predefined Result IDs.

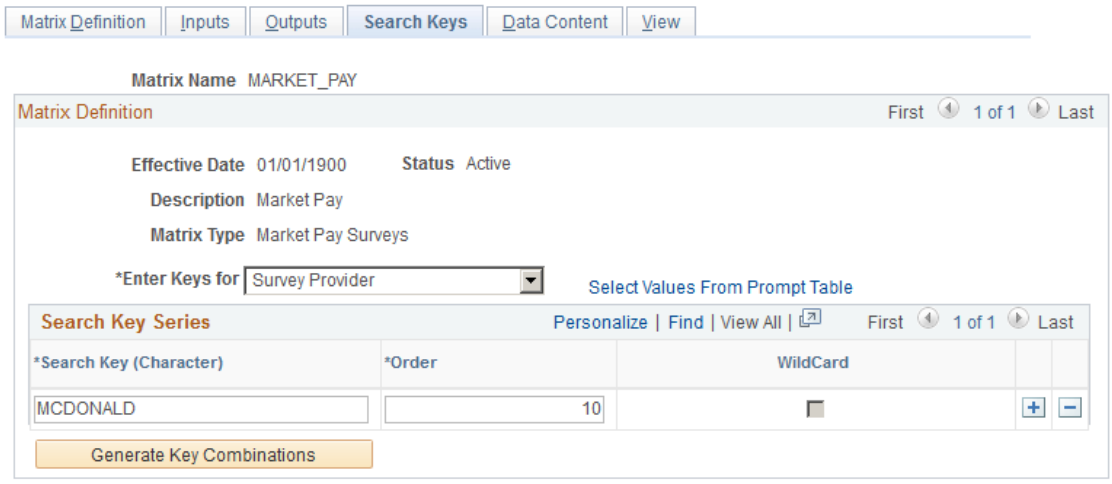
Search Keys Page

Use the Search Keys page (WCS_LK_TBL_KEYS) to specify the search keys to be used to match worker data used in market pay surveys.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **Search Keys**

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



Use this page to enter the key values against which worker data is matched. Suitable search keys for a market pay matrix are *Geographical Area* or *Survey Provider.*

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> **Note**
>
> You can create a matrix without specifying any search keys and output data values. For example, you might want to define a template for a matrix and then load values from other sources such as a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you receive a warning.

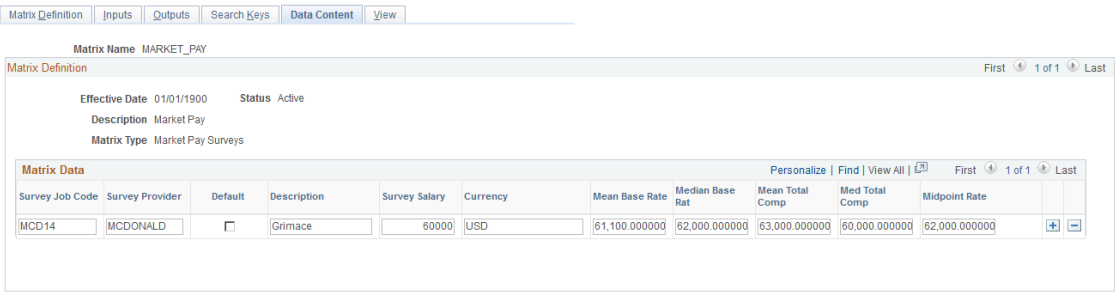
Data Content Page

Use the Data Content page (WCS_LK_TBL_DATA) to view or enter values for the output data.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **Data Content**

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



Use this page to view input and output fields. You may leave the data values blank for the loading of market pay data from a file or Workforce Rewards. You may also enter the data manually.

View Page

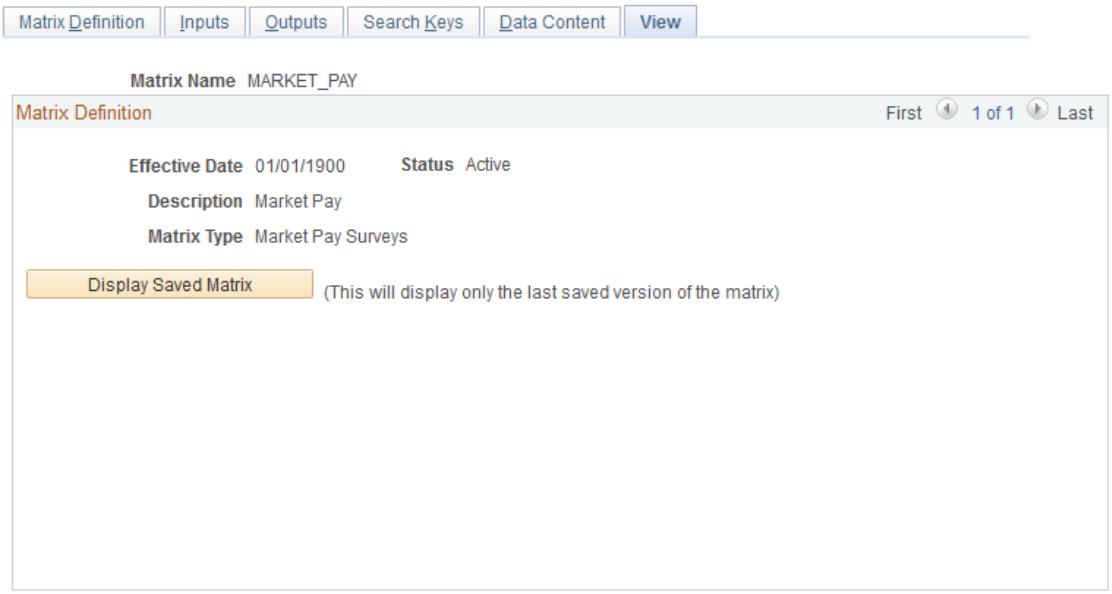
Use the View page (WCS_LK_TBL_VIEW) to view the matrix as of the last saved version.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Configurable Matrices**, and then **Define Configurable Matrices**, and then **View**

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

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After you have entered all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

When you click the **Display Saved Matrix** button, the results generated are from the *last saved* version of the matrix.

> **Important**
>
> This page displays only the *last saved* version of the matrix.

See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Understanding Configurable Matrices.

Mapping Data and Loading the Matrix

To map market pay data and load the matrix, use the Define Salary Survey Mapping (SP_SURV_MAP_TBL), Associate Mkt Pay to Job Codes (SP_SAL_SURV_TBL), Load Market Pay Data from File (SP_SURVLOAD_TBL), and Report Market Pay by Job Code (SP_MPAY_RPT_TBL) components.

These topics discuss mapping data and loading the matrix.

Pages Used to Map Data and Load the Matrix

Page Name	Definition Name	Usage
Define Salary Survey Mapping Page	SP_SURV_MAP_TBL	Map market pay matrix fields to existing salary survey fields.
Associate Mkt Pay to Job Codes Page	SP_SAL_SURV_TBL	Associate market pay matrices to specific job codes.

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Page Name	Definition Name	Usage
Market Pay Match Page	JOBCD_MP_SAL_SURV	Associate a market pay matrix to a specific job code using the Job Code table.
Load Market Pay Data from File Page	SP_SURVLOAD_TBL	Load market pay data from files to overwrite existing data or add new data.
Report Market Pay Data by Job Code Page	SP_MPAY_RPT_TBL	Run this effective-dated report that displays all the market pay definitions ever associated with a particular job code.

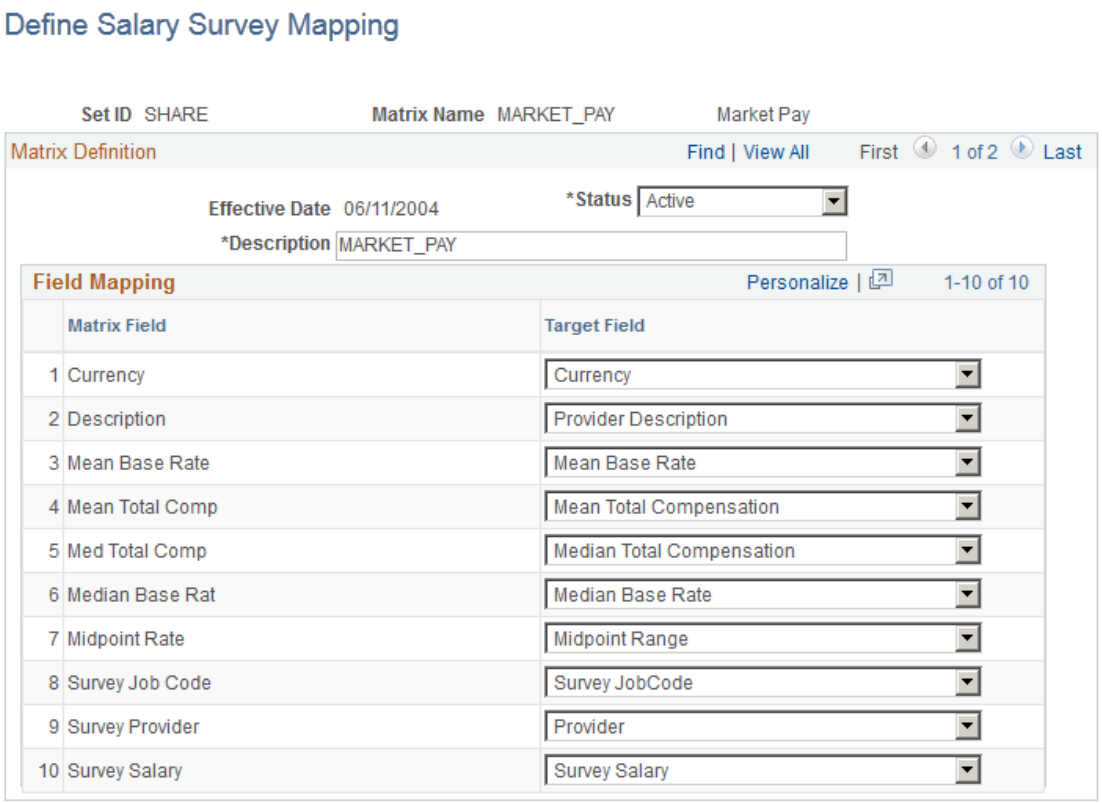
Define Salary Survey Mapping Page

Use the Define Salary Survey Mapping page (SP_SURV_MAP_TBL) to map market pay matrix fields to existing salary survey fields.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Market Pay**, and then **Define Salary Survey Mapping**, and then **Define Salary Survey Mapping**

This example illustrates the fields and controls on the Define Salary Survey Mapping page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> The MARKET_PAY and WFR_SURVEY_DATA matrices are delivered with the system. You can also define configurable matrices to include market pay survey data.

See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Defining and Maintaining Configurable Matrices.

Field or Control	Description
Matrix Field	The system displays the values from the Matrix Definition page.
Target Field	Select a value. These values come from the Job Code table.

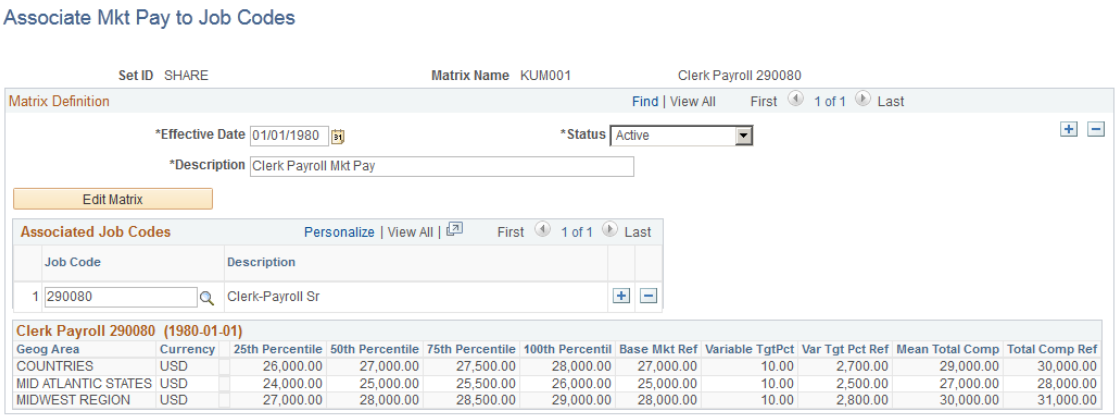
Associate Mkt Pay to Job Codes Page

Use the Associate Mkt Pay to Job Codes page (SP_SAL_SURV_TBL) to associate market pay matrices to specific job codes.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Market Pay**, and then **Associate Mkt Pay to Job Codes**, and then **Associate Mkt Pay to Job Codes**

This example illustrates the fields and controls on the Associate Mkt Pay to Job Codes page. You can find definitions for the fields and controls later on this page.



Click the **Add** button to create a new association between market pay data and job codes. Click **Search** to find existing values.

Field or Control	Description
Edit Matrix	Click this button to access the Data Content page in the Matrix Definition component, where you can add, modify, or delete the Matrix Data field information.

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Field or Control	Description
Job Code	Select the job codes to which you want to associate the market pay matrix. You may link multiple job codes to one market pay matrix. However, a single job code can only be associated to one market pay matrix at a given time.

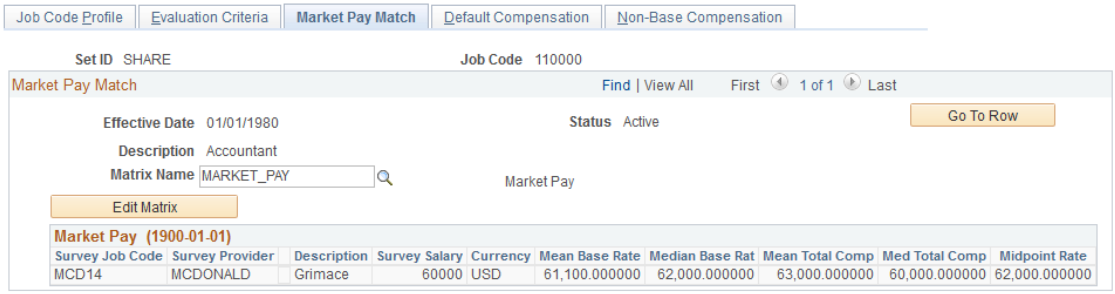
Market Pay Match Page

Use the Market Pay Match page (JOBCD_MP_SAL_SURV) to associate a market pay matrix to a specific job code using the Job Code table.

Navigation:

Set Up HCM, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Code Table**, and then **Market Pay Match**

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



> **Note**
>
> You must be in Correct History mode to see new effective-dated matrix data for a job code. You can have only one market pay matrix associated with a single job code at a given time.

Field or Control	Description
Matrix Name	Select the market pay matrix that you want to associate with this job code.
Edit Matrix	Click this button to access the Data Content page on the linked matrix, where you can view and edit values associated with this matrix.

See PeopleSoft Human Resources Manage Base Compensation and Budgeting: Data Content Page.

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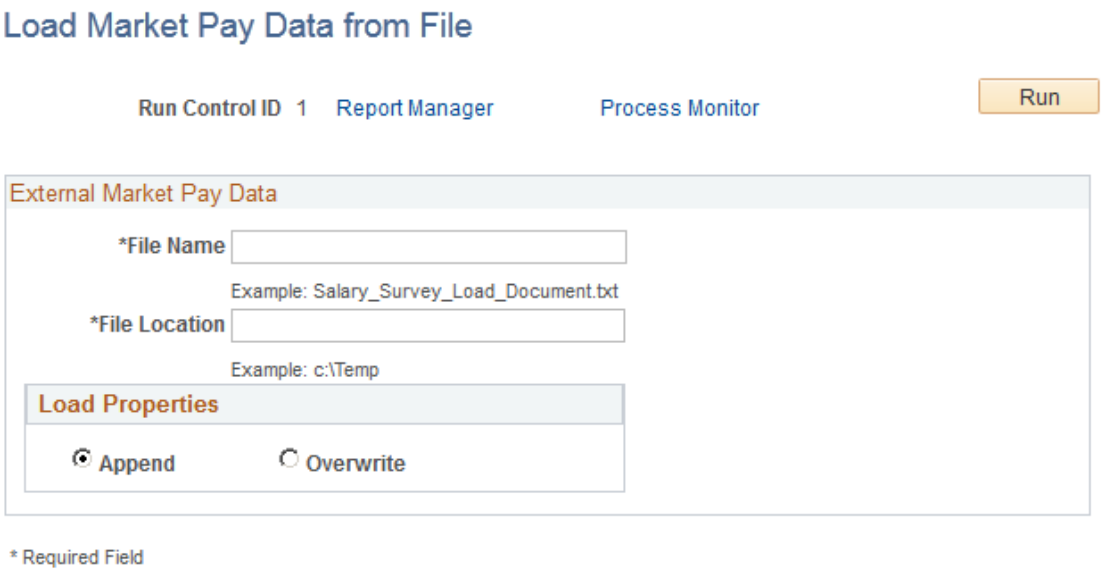
Load Market Pay Data from File Page

Use the Load Market Pay Data from File page (SP_SURVLOAD_TBL) to load market pay data from files to overwrite existing data or add new data.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Market Pay**, and then **Load Market Pay Data from File**, and then **Load Market Pay Data from File**

This example illustrates the fields and controls on the Load Market Pay Data from File page. You can find definitions for the fields and controls later on this page.



Required fields for the *input file* are SETID, EFFECTIVE DATE (date in the format yyyy-mm-dd), EFFECTIVE STATUS, DESCRIPTION, JOBCODE, MATRIX ID, The fields must be in the order shown. Also the fields in the matrix must follow the matrix ID and also be in the same order as they are in the matrix. We recommend that you open the file and verify the date format, as some utilities such as Excel might reformat your date differently than is displayed. You can format the date the correct way by defining it manually in Excel.

Field or Control	Description
File Name	Enter the name of the file from which you want to import the market pay data.
File Location	Enter the location of the import file. You can also specify a machine name for a location in the format "\\machinename\directory".
Load Properties	Select **Append** to add the market pay information to the existing file. Select **Overwrite** to replace the data that is already in the system with the data that is in the file.

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Loading Market Pay Data From Workforce Rewards

You can load market pay data by using the COMP_MKT_RATE_SYNC Integration Broker message and service operation published from Workforce Rewards. These new target market rates come from the WA_MKT_RATE_TBL.

> **Note**
>
> The COMP_MKT_RATE_SYNC service transaction loads the market rates into a delivered configurable matrix definition. If you want to load the data to a matrix with different fields, you would have to create a new message and service operation.

See *PeopleSoft Workforce Rewards,* "Managing Market Compensation".

Data Content Page

Use the Data Content page of the appropriate matrix to manually enter the market pay data into the Matrix Data group box.

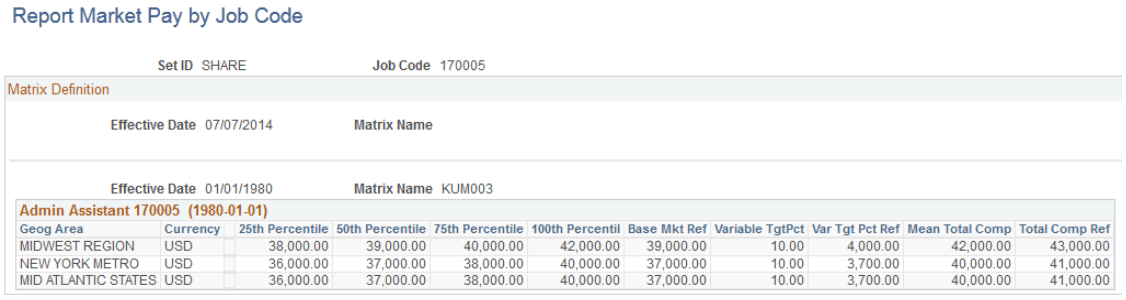
Report Market Pay Data by Job Code Page

Use the Report Market Pay by Job Code page (SP_MPAY_RPT_TBL) to run this effective-dated report that displays all the market pay definitions ever associated with a particular job code.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **Market Pay**, and then **Report Market Pay Data by Job Code**, and then **Report Market Pay Data by Job Code**

This example illustrates the fields and controls on the Report Market Pay by Job Code page. You can find definitions for the fields and controls later on this page.



Report Market Pay by Job Code

Set ID SHARE Job Code 170005

Matrix Definition

Effective Date 07/07/2014 Matrix Name

Effective Date 01/01/1980 Matrix Name KUM003

Admin Assistant 170005 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref	Variable TgtPct	Var Tgt Pct Ref	Mean Total Comp	Total Comp Ref
MIDWEST REGION	USD	38,000.00	39,000.00	40,000.00	42,000.00	39,000.00	10.00	4,000.00	42,000.00	43,000.00
NEW YORK METRO	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00	10.00	3,700.00	40,000.00	41,000.00
MID ATLANTIC STATES	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00	10.00	3,700.00	40,000.00	41,000.00

This page displays the current market pay data as well as previous and future market pay data when available.

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21

Setting Up Pay Calendars

Creating Balance IDs

To create balance IDs, use the Balance ID Table (BALANCE_ID_TABLE) component.

These topics provide an overview of balance IDs and discuss how to create balance IDs.

> **Note**
>
> The information in these topics applies to Oracle's PeopleSoft Payroll for North America and Oracle's PeopleSoft Payroll Interface. The information in these topics does not apply to Oracle's PeopleSoft Global Payroll.

Pages Used to Create Balance IDs

Page Name	Definition Name	Usage
Balance ID Table 1 Page	BALANCE_ID_TBL1	Create cycles for payroll processing according to pay group and define your balance year.
Set ID - Comments Page	BALANCE_ID_PU	View the set ID established for each company.
Balance ID Table 2 Page	BALANCE_ID_TBL2	Define the actual quarter definition by company and year for each Balance Year ID.

Understanding Balance IDs

You can maintain balances by calendar year, fiscal year, benefit year, or any other method you want. Specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

> **Note**
>
> You must set up one balance ID with the **Bal for Calendar Year** (balance for calendar year) option selected for each company for which you process payroll.

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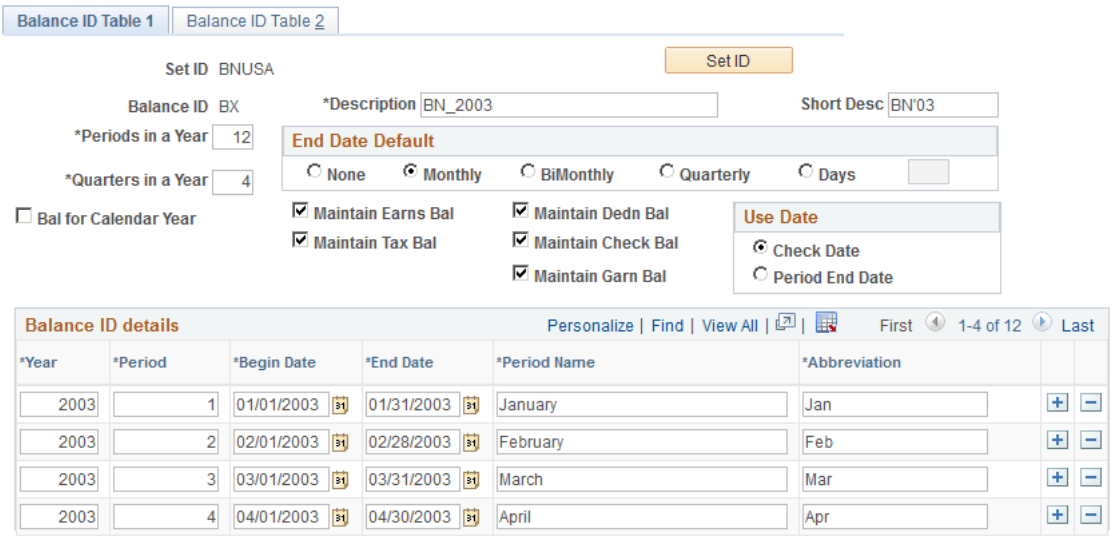
Balance ID Table 1 Page

Use the Balance ID Table 1 page (BALANCE_ID_TBL1) to create cycles for payroll processing according to pay group and define your balance year.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Balance ID Table**, and then **Balance ID Table 1**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Balance ID Table**, and then **Balance ID Table 1**

This example illustrates the fields and controls on the Balance ID Table 1 page. You can find definitions for the fields and controls later on this page.



Creating a Calendar Year Balance ID

To create a balance ID for the calendar year:

1. Select the Bal for Calendar Year check box.
2. Enter a year in the Year field.
3. Click the Create button.
4. Save the page.

All other fields become unavailable for entry. The system automatically creates the balance ID details for twelve periods in the year, four quarters in the year, and the end date default of *Month.*

Creating a Non-Calendar Year Balance ID

If you are creating a non-calendar year balance ID, you must specify values in the Periods in a Year/Quarters in a Year, End Date Default, Use Date, and Balance ID Details fields. You must also select the balances to be maintained.

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Entering Values

Field or Control	Description
Set ID	Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The setID for the Balance ID Table component is specified on the Company Table – Company Location page.
Balance ID	Entered on the Balance ID Table search page. Identifies a balance period, for example CY for Calendar Year, FY for Fiscal Year, or BY for Benefit Year. Once you establish a balance ID it should not be changed.
Periods in a Year	If you are not setting up a balance ID for a calendar year, specify the number of periods in a year.
Quarters in a Year	If you are not setting up a balance ID for a calendar year, specify the number of quarters in a year.
Bal for Calendar Year (balance for calendar year)	Select if you are setting up a balance ID for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for **Description** and **Short Desc)** to become unavailable for entry. All balance types are automatically selected for the calendar year, and the **Check Date** option is automatically selected. However, the **Yr** field and **Create** button appear and become available for entry.
Yr (year)	Enter the year for which balances are to be created.
Create	Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

End Date Default

If you are not setting up a balance ID for a calendar year, use this group box to specify the end date to apply for the calendar year.

Field or Control	Description
None	Select if you do not want a specific end date for the calendar year.
Month, BiMonth, Quarterly, and **Days**	Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.

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Field or Control	Description
Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, and **Maintain Garn. Bal**	If you are not setting up a balance ID for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating. **Note:** Each of these balances is maintained for the year being defined. For example, if you are defining a fiscal year and **Maintain Earns Bal** was selected, earnings balances for the fiscal year are maintained.

Use Date

If you are not setting up a balance ID for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Field or Control	Description
Check Date	Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your check date was June 23, 2007, the balance would be included in this fiscal year. If, however, the check date were July 1, 2007, the balance would be in the next fiscal year.
Period End Date	Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your pay period end date was June 23, 2007, the balance would be included in this fiscal year. If, however, the pay period end date were July 1, 2007, the balance would be in the next fiscal year.

Balance ID Details

If you are not setting up a balance ID for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

> **Note**
>
> For the first entry, enter values in the **Year, Period, Begin Date, End Date, Period Name** and **Abbreviation** fields; after you have entered this information, the values in the **Year, Period, Begin Date** and **End Date** fields are set by default automatically for any additional rows, based on the values entered in the previous row.

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Field or Control	Description
Year, Period, Begin Date, End Date, and **Period Name**	Enter the year, period, begin date, end date, and period name for the balance type.
Abbreviation	Enter the abbreviation for the period name.

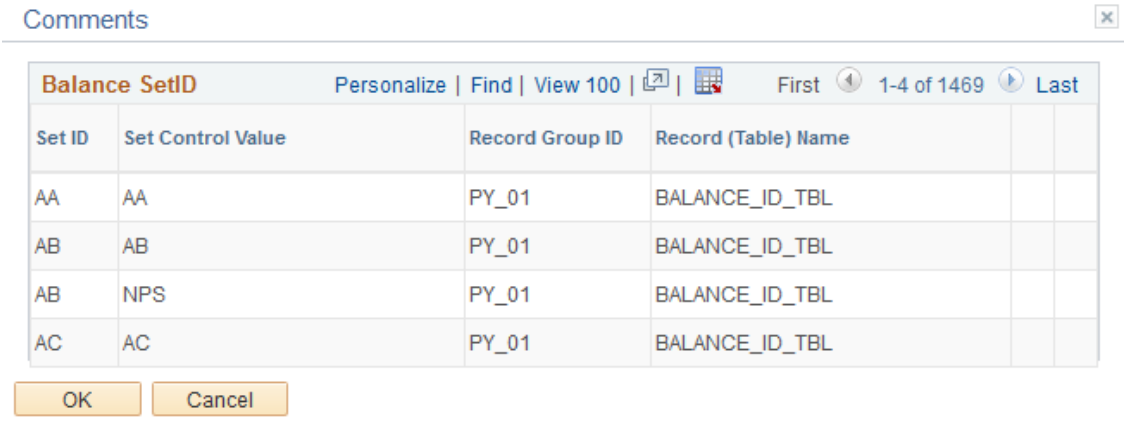
Set ID - Comments Page

Use the Set ID - Comments page (BALANCE_ID_PU) to view the set ID established for each company.

Navigation:

Click the **Set ID** button on the Balance ID Table 1 or Balance ID Table 2 page.

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



The Set ID page displays the set ID established for each company. This helps you to know which set ID to enter for a specific company.

Balance ID Table 2 Page

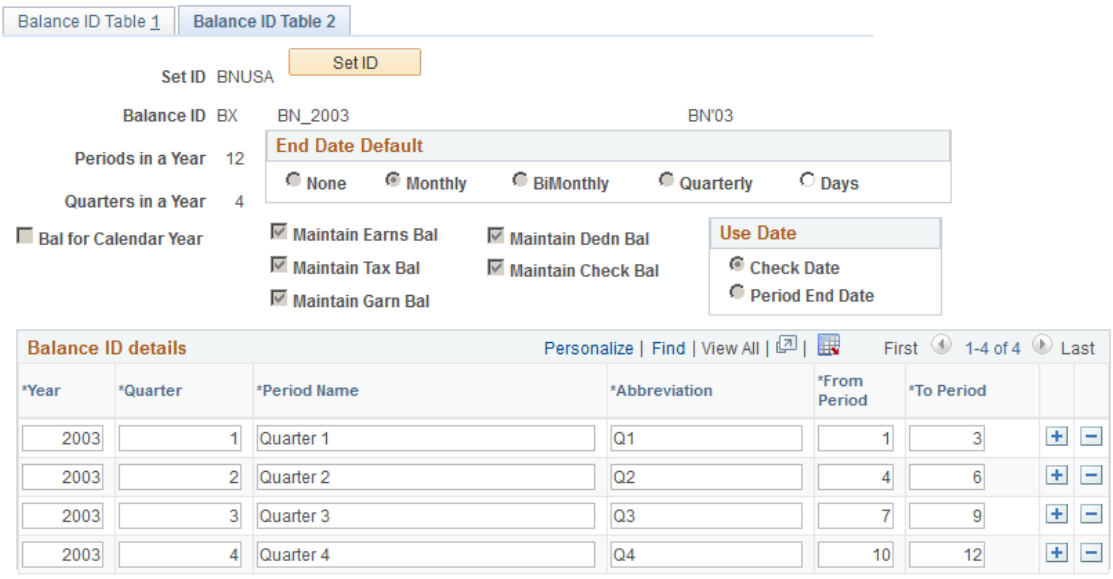
Use the Balance ID Table 2 page (BALANCE_ID_TBL2) to define the actual quarter definition by company and year for each Balance Year ID.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Balance ID Table**, and then **Balance ID Table 2**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Balance ID Table**, and then **Balance ID Table 2**

This example illustrates the fields and controls on the Balance ID Table 2 page. You can find definitions for the fields and controls later on this page.

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If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a calendar year balance ID type on the Balance ID Table 1 page, you must enter a value for the **Year, Quarter, Period Name, Abbreviation, From Period,** and **To Period** fields. For each row that you add after the first, the **Year, Quarter,** and **From Period** fields are set by default, based on the value in the **Quarters in a Year** field.

Related Topics

- Balance ID Table 1 Page
  Use the Balance ID Table 1 page (BALANCE_ID_TBL1) to create cycles for payroll processing according to pay group and define your balance year.

Creating Pay Run IDs

To create pay run IDs, use the Pay Run Table (PAY_RUN_TABLE) component. Use the PAY_RUN_TABLE component interface to load data into the tables for this component.

These topics provide an overview and discuss how to create pay run IDs.

> **Note**
>
> The information in these topics applies to Oracle's PeopleSoft Payroll for North America and Oracle's PeopleSoft Payroll Interface. The information in these topics does not apply to Oracle's PeopleSoft Global Payroll.

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Page Used to Create Pay Run IDs

Page Name	Definition Name	Usage
Pay Run Table Page	PAY_RUN_TABLE	Create pay run IDs to combine pay calendar entries from different pay groups for processing.

Understanding Pay Run IDs

Use pay run IDs to indicate to the system which pay calendar entries to process together. A pay run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same pay run ID.

Generally, all calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

> **Note**
>
> A pay run ID must be unique throughout payroll history. You must create pay run IDs in the Pay Run table before you enter them on the pay calendar. The pay run ID may be up to 10 characters. PeopleSoft suggests that you use as many of the 10 available characters as is necessary to ensure that your pay run ID is easily identifiable.

Pay Run Table Page

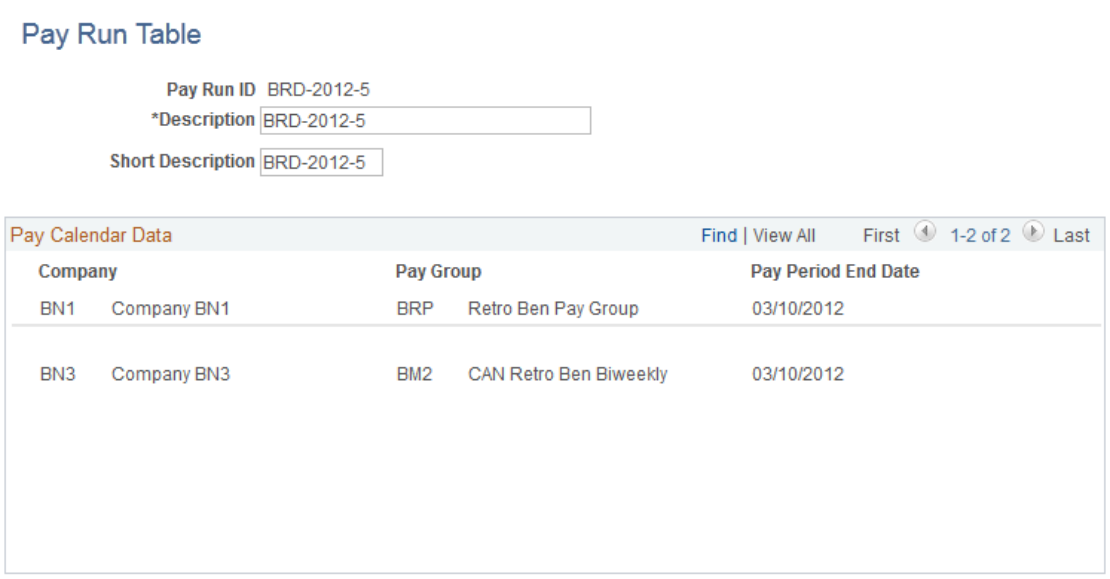
Use the Pay Run Table page (PAY_RUN_TABLE) to create pay run IDs to combine pay calendar entries from different pay groups for processing.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Run Table**, and then **Pay Run Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Run Table**, and then **Pay Run Table**
- **Set Up HCM**, and then **Product Related**, and then **Benefits NLD**, and then **Pay Run Table**, and then **Pay Run Table**, and then **Pay Run Table**

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

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Field or Control	Description
Short Description	Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the pay run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.
Company, Pay Group, and **Pay Period End Date**	The **Pay Calendar Data** group box displays all the pay calendar entries grouped under the pay run ID. After you enter the pay run IDs on the Pay Calendar table, return to this page to check the pay calendar data assigned to each pay run ID.

Creating Pay Calendars and FLSA Calendars

To create pay calendars and FLSA calendars use the Create Pay Calendars (RUNCTL_PAY_CAL_BLD), FLSA Calendar Table (FLSA_CALENDAR), Initial FLSA Calendar (RUNCTL_FLSACALPD) components. Use the FLSA_CALENDAR component interface to load data into the tables for the FLSA Calendar Table component.

These topics provide overviews of pay calendars and FLSA calendars and discuss how to create pay calendars and FLSA calendars.

> **Note**
>
> The information in these topics applies to Oracle's PeopleSoft Payroll for North America and Oracle's PeopleSoft Payroll Interface. The information in these topics does not apply to Oracle's PeopleSoft Global Payroll.

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Pages Used to Create Pay Calendars and FLSA Calendars

Page Name	Definition Name	Usage
FLSA Calendar Table Page	FLSA_CALENDAR	Set up FLSA calendars.
Create FLSA Calendars Page	RUNCTL_FLSACALPD	Run the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA), which creates FLSA calendars for existing pay groups and pay calendars.
Create Pay Calendars Page	RUNCTL_PAY_CAL_BLD	Create pay calendars automatically. (After the pay calendars are built, use the Pay Calendar Table page to manually complete the pay calendar entries.)
Pay Calendar Table Page	PAY_CALENDAR_TABLE	Manually build a single pay calendar. Manually complete pay calendar entries for calendars that were created automatically. Review pay calendars.
(USF) Additional FederalPayroll Info Page	GVT_PAY_STATUS_SEC	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.
Wage Statement Status Page	PAY_CALENDAR_TBL3	Track the completion of pay statement processes.
Pay Confirm Options Page	PAY_CALENDAR_TBL2	Select whether to bypass payroll messages during the Pay Confirmation process.
Pay Calendar Report Page	PRCSRUNCNTL	Generate a report that lists information from the Pay Calendar Table component, which contains the cycles that you create for payroll processing by pay group. Each entry in the table corresponds to a pay period for a pay group.
Open/Close Pay Calendar Page	RUNCTL_PAY130	(USA) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.
Open/Close Pay Calendar Page	RUNCTL_130CN	(CAN) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.

Understanding Pay Calendars

Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates, for a pay

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group. A monthly pay group has 12 entries in the pay calendar, representing one year of processing.

These topics discuss:

- Pay run ID assignment.
- Pay calendar creation.
- Automatic pay calendars.
- Manual pay calendars.

Pay Run ID Assignment

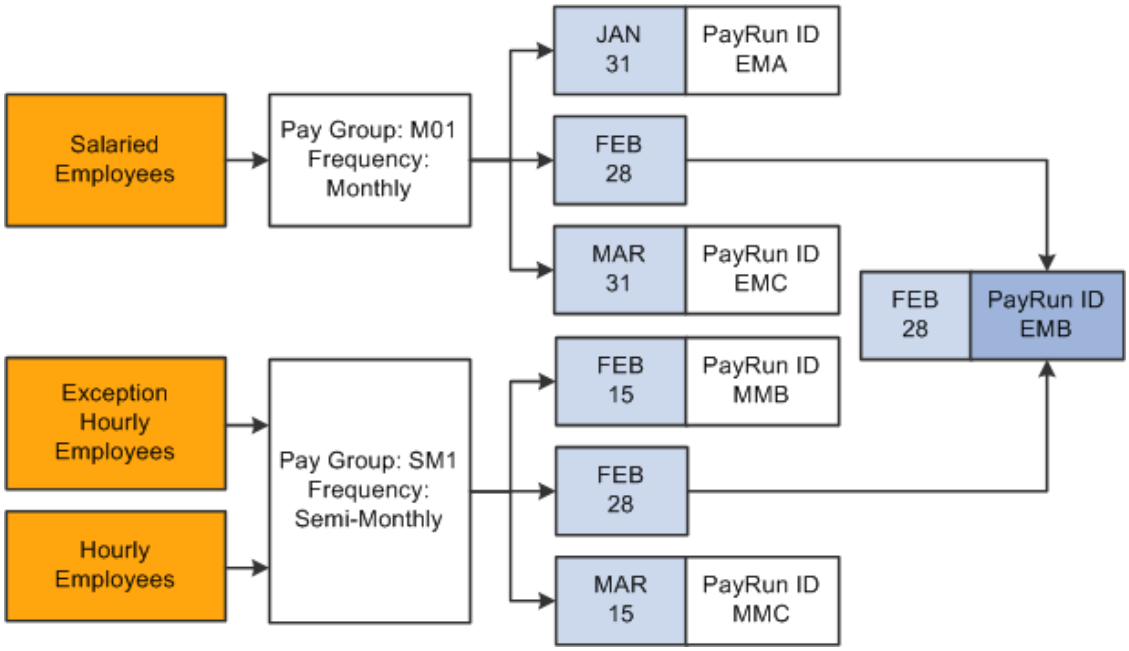
To process payrolls, the pay calendar entry being processed must be assigned a pay run ID. Generally, all pay calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different pay run ID for each Pay Period End Date on the Pay Calendar Table component.

> **Note**
>
> All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on the Pay Group Table – Process Control page. If this condition is not met, the system cannot transfer any paysheets with errors for the pay run ID.

If you have a semi-monthly and a monthly pay calendar and set up both to continue processing with errors, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule and Continue with Errors setting determine which groups can or can't be grouped together.

In the following illustration, CCB has assigned the same pay run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time. For pay groups that do not share the same pay period end date, such as the Semimonthly mid-month pay period (February 15 or March 15), have their own pay run IDs (MMB and MMC). Both pay groups are set up for continue with errors processing:

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Pay Calendar Creation

Follow these steps to create pay calendars:

1. Set up a balance ID — required for the pay calendar.
2. Set up a pay run ID — required for the pay calendar.
3. Build the pay calendars — either automatically or manually.

You must create a calendar entry for every pay period for each pay group you set up. You must also assign a pay run ID to each calendar entry before you run the payroll.

Automatic Pay Calendars

To build pay calendars automatically, use the Create Pay Calendars page followed by the Pay Calendar Table page:

1. Use the Create Pay Calendars page to automatically build pay calendars.

   The Create Pay Calendars page enables you to run the Calendar Build process (PSPCLBLD), which automatically generates the pay calendar entries for all or part of a year. To run the process:

   a. Set up the run control data.
   b. Run the process.
   c. Review any error messages.

   Follow the same procedure for all pay groups. Each time you run the Calendar Build process, the system deletes the run control data. Therefore, whenever you rerun the process, you must enter the data again.

2. Use the Pay Calendar Table page to manually complete the pay calendar entries.

   The Calendar Build process does not assign values to **Pay Run ID, Accrual Percent, Reverse Accruals, Aggregate ID, Off-Cycle Calendar, Off-Cycle Ded Override, General Ded Subset ID, Benefit Ded Subset ID, Benefit Deductions Taken,** or **General Deductions Taken** fields on the Pay Calendar Table page. After you run the process, you

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must enter values for these fields manually. Although some of these fields are optional, you must assign a pay run ID to each calendar entry before you run the payroll.

Manual Pay Calendars

To build a pay calendar manually or to manually complete pay calendar entries for pay calendars that were built automatically, use the Pay Calendar Table page (PAY_CALENDAR_TABLE).

In general, you build stand alone, off-cycle pay calendars manually only to accommodate off-cycle processing, such as adjustments, online checks, or check reversals.

Understanding FLSA Calendars

You must define Fair Labor Standards Act (FLSA) calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. You must add the FLSA Calendar ID to the system before you can complete the Pay Group table. The FLSA calendar requirement does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them.

The same process that creates pay calendars also creates FLSA Calendars.

Follow these steps to create FLSA calendars:

1. Set up the FLSA calendar on the FLSA Calendar Table page.

   Enter the FLSA Calendar ID and specify period length and period start date.

2. Run the Calendar Build process from the Create Pay Calendars page.

   If you did not set up the FLSA calendar before you ran the Calendar Build process, you can use the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA) to build FLSA calendars. You can also use this process if pay group FLSA status is updated or changed.

3. To view the FLSA periods, return to the FLSA Calendar Table page.

> **Note**
>
> The system creates the FLSA calendar for the entire calendar year. The pay calendar dates do not affect the FLSA calendar.

FLSA Calendar Table Page

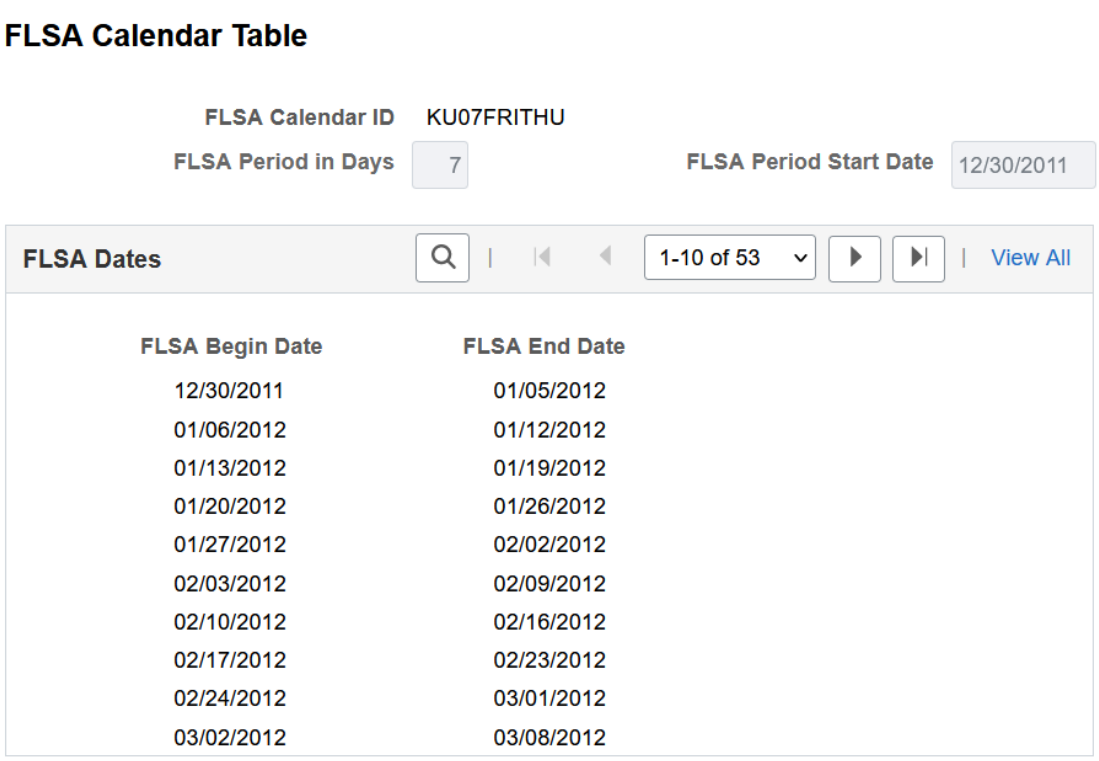
Use the FLSA Calendar Table page (FLSA_CALENDAR) to set up FLSA calendars.

Navigation:

Set Up HCM, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **FLSA Calendar Table**, and then **FLSA Calendar Table**

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

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Field or Control	Description
FLSA Calendar ID	The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of 14, MON-SUN, would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.
FLSA Period in Days	Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.
FLSA Period Start Date	Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

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> **Note**
>
> After you create the FLSA calendar using the Calendar Build process, the FLSA Calendar Table page becomes display-only. Each row in the FLSA Dates group box displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections.

Related Topics

- Understanding FLSA Calendars
  You must define Fair Labor Standards Act (FLSA) calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. You must add the FLSA Calendar ID to the system before you can complete the Pay Group table. The FLSA calendar requirement does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.
- PeopleSoft Payroll for North America: Setting Up for FLSA Calculation

Create Pay Calendars Page

Use the Create Pay Calendars page (RUNCTL_PAY_CAL_BLD) to create pay calendars automatically.

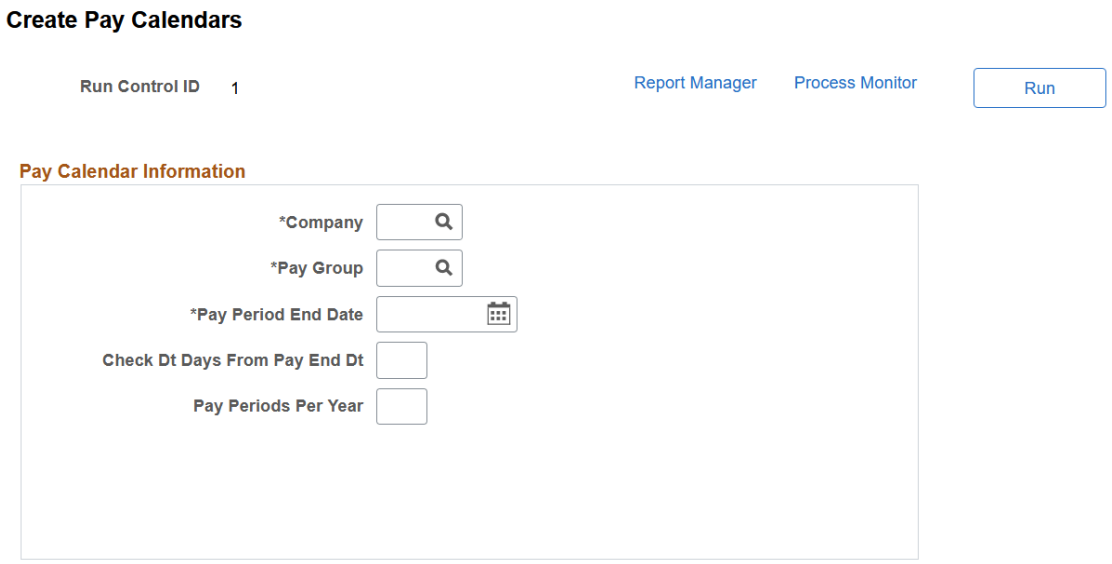
(After the pay calendars are built, use the Pay Calendar Table page to manually complete the pay calendar entries.)

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Create Pay Calendars**, and then **Create Pay Calendars**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Create Pay Calendars**, and then **Create Pay Calendars**

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

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> **Note**
>
> Use the Create Pay Calendars page to set up and run the Calendar Build process. Once the calendars are built, use the Pay Calendar Table page to assign pay run IDs and other information.

> **Note**
>
> You must set up the calendar year balance ID before creating calendars.

Field or Control	Description
Pay Period End Date	Enter the first pay period end date for the pay calendar. For example, for a semi-monthly payroll for 2009, enter *01/15/2009*. To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter *03/15/2009*.
Check Dt Days From Pay End Dt	Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to *3*. If the pay period end date is January 31 and the check date is January 30, enter *-1*. Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.

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Field or Control	Description
Pay Periods Per Year	The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.
Pay Year	(USF) This field appears only for U.S. federal customers. The IRR process requires a pay year. When processing IRRs, the IRR Fiscal Data accumulator identifies all monies that come from the pay year. Enter the pay year to which the pay calendar applies.

(USF) Define Years

This group box appears only for U.S. federal customers.

Field or Control	Description
Calendar Yr Run (calendar year run)	This value is used by federal leave processing on particular leave types for which accrual begins with the calendar year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the leave plan calendar year. For example, for a monthly payroll there are twelve pay calendars in a year. January would be the starting point, so enter *1* in this field.
Pay Yr Run (pay year run)	This value is used by federal annual leave accrual processing on leave types for which accrual begins with the pay year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the pay year for leave accrual processing.
Fiscal Yr Run (fiscal year run)	This value is used by federal annual leave accrual processing on leave types for which accrual begins with the fiscal year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the fiscal year for leave accrual processing.
Leave Yr Run (leave year run)	This value is used by federal annual leave accrual processing only. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the annual leave year. **Note:** The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

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Related Topics

- (USF) Additional FederalPayroll Info Page
  Use the Payroll Status page (GVT_PAY_STATUS_SEC) to indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.
- Understanding Pay Calendars
  Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the pay calendar, representing one year of processing.

Pay Calendar Table Page

Use the Pay Calendar Table page (PAY_CALENDAR_TABLE) to manually build a single pay calendar.

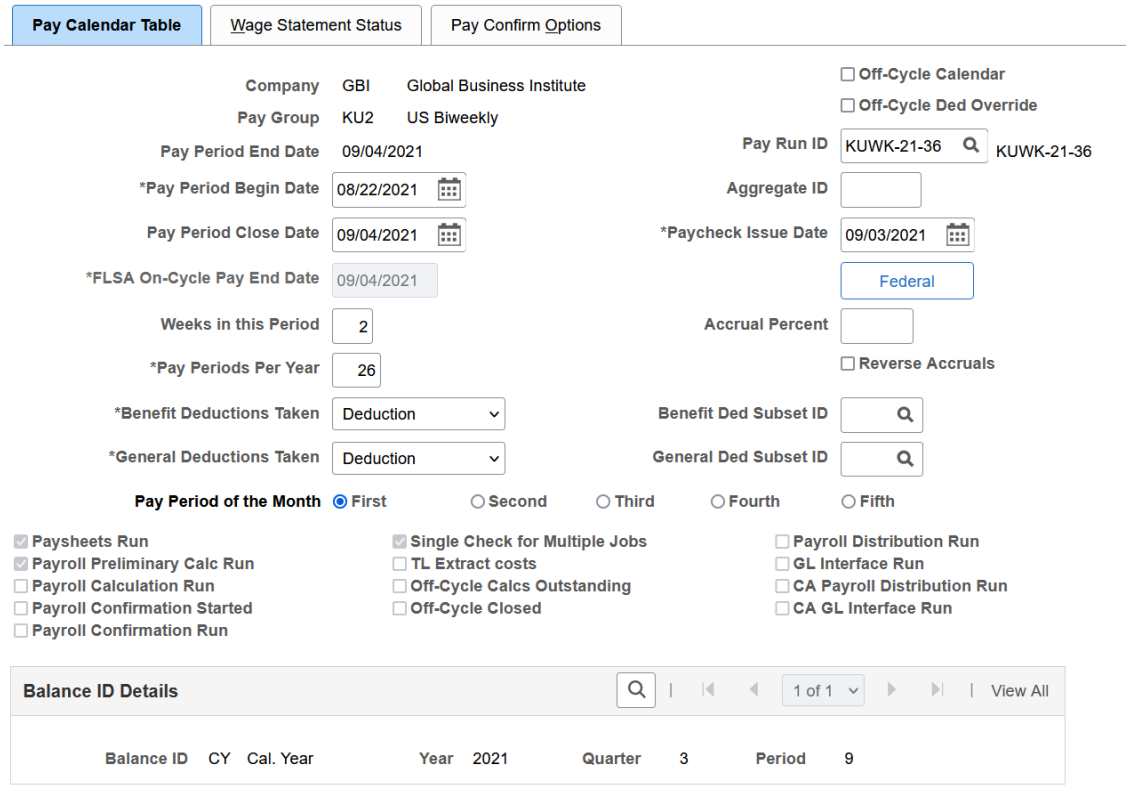
Manually complete pay calendar entries for calendars that were created automatically. Review pay calendars.

Navigation:

- **Payroll for North America**, and then **Payroll Processing USA**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Calendar Table**
- **Payroll for North America**, and then **Payroll Processing CAN**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Calendar Table**
- **Payroll for North America**, and then **Payroll Processing USF**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Calendar Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Calendar Table**, and then **Pay Calendar Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Calendar Table**, and then **Pay Calendar Table**

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

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Field or Control	Description
Pay Period End Date	The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day. The pay calculation program uses these dates to determine which deductions and additional pays to use.
Pay Period Begin Date	Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determine if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day. The pay calculation program uses these dates to determine which deductions and additional pays to use.

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Field or Control	Description
FLSA On-Cycle Pay End Date	Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect on FLSA check box on the Earnings Table – General page is not set to None), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.
Weeks in this Period	Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.
Pay Periods Per Year	Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year. Example: If you set up a deduction for $100 per month, the system multiplies $100 by 12 to arrive at $1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of $100 per pay period. For semi-monthly employees, the system divides the deduction by 24. For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the **Pay Periods Per Year** field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year. The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year. **Note:** For monthly and semi-monthly pay calendars, the **Pay Periods Per Year** field is unavailable for entry; the only valid values are *12* and *24*.

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Field or Control	Description
Off-Cycle Calendar	Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.
Off-Cycle Ded Override (off-cycle deduction override)	For an off-cycle run, select this check box to specify that the Pay Calculation process should use the deduction override process to determine deductions. If **Off-Cycle Calendar** is selected and **Off-Cycle Ded Override** is deselected, then the deduction override evaluation process is bypassed during pay calculation. That means that employee-level benefit or general deduction override will not take effect. This might be useful for an off-cycle bonus run.
Pay Run ID	Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same pay run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a pay run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a pay run ID.

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Field or Control	Description
Aggregate ID	(USA) Enter an aggregate ID to indicate aggregate taxation. Entering a value here tells the system to aggregate taxation for the entire pay group. Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period, such as a temporary staffing agency paying employees for multiple assignments within a weekly pay period. The system aggregates all pay calendars with the same aggregate ID value (including off-cycle payrolls) for the purposes of tax calculations. All wages paid on calendars with the same aggregate ID are combined, then annualized and taxed accordingly. **Note:** If you add stand-alone off-cycle calendars to be aggregated together, the pay period end date must be the day after the first confirmed check's pay period end date. If you enter the same aggregate ID on multiple pay calendars, then for a given employee, each succeeding check (whether off-cycle or on-cycle) calculated under each of these pay calendars is aggregated with all of the already-calculated qualifying checks of the previous pay calendars which were set up using the same aggregate ID. If a pay calendar has a unique aggregate ID, then for a given employee, succeeding off-cycle and on-cycle checks are aggregated with any already-confirmed qualifying off-cycle checks for that pay calendar. To aggregate taxation across checks, you must also set up the earnings code with *Specified on Paysheet* specified as the tax method and you must manually specify *Aggregate* as the tax method on off-cycle paysheets. See PeopleSoft Payroll for North America: Aggregate Taxation of Multiple Checks.
Paycheck Issue Date	Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation. **Note:** The system updates employee balances (such as taxes, deductions, and earnings) based upon the check date on the pay calendar you are processing with, not the check date on the paysheet or check. These dates are often the same, but not always.
Federal	(USF) Click this button to access the Payroll Status page. This button appears only for U.S. federal customers.

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Field or Control	Description
Accrual Percent	Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger Interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the **Reverse Accruals** check box and leaving the **Accrual Percent** field deselected. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.
Reverse Accruals	Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the **Accrual Percent** field deselected. If the **Accrual Percent** field is not deselected, you must deselect the **Reverse Accruals** check box. **Note:** The **Accrual Percent** field and **Reverse Accruals** check box are not applicable to PeopleSoft Payroll for North America for E&G.
Benefit Deductions Taken	Select a value to indicate how to take benefit deductions for this pay run. The default value is *Deduction.* • *None:* Select this value if you do not want to take benefit deductions. • *Deduction:* Select this value if you want to use the regular benefit deductions defined on the Deduction Table pages for these employees. This is the default value. • *Subset:* Select this value if you want to use a specified benefit deduction subset. If you select this value, you must specify the subset ID in the **Benefit Ded Subset ID** (benefit deduction subset ID) field.
Benefit Ded Subset ID (benefit deduction subset ID)	Specify the subset ID if you selected Subset in **Benefit Deductions Taken.**

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Field or Control	Description
General Deductions Taken	Select a value to indicate how to take general deductions for this pay run. The default value is *Deduction.* • *None:* Select this value if you do not want to take general deductions. • *Deduction:* Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees. This is the default value. • *Subset:* Select this value if you want to use a specified general deduction subset. If you select this value, you must specify the subset ID in the **General Ded Subset ID** (general deduction subset ID) field.
General Ded Subset ID (general deduction subset ID)	Specify the subset ID if you selected Subset in **General Deductions Taken.**
Pay Period of the Month	Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: *First, Second, Third, Fourth,* and *Fifth.*

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

The background programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

Field or Control	Description
Off-Cycle Closed	After an on-cycle payroll is confirmed for the next pay period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar. **Note:** You can use the Open/Close Pay Calendar process (PAY130 or PAY130CN) to open the calendar (deselect the off-cycle closed check box) to process year end adjustments. After the adjustments are processed, run the PAY130 or PAY130CN to close the calendar. This process only opens or closes the last on-cycle calendar of the year.

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Field or Control	Description
Payroll Distribution Run	Selected when the non-commitment accounting GL distribution has been run.
GL Interface Run	Selected when the (non-commitment accounting) accounting lines have been created.
CA Payroll Distribution Run (commitment accounting payroll distribution run)	Selected when the commitment accounting GL distribution has been run.
CA GL Interface Run (commitment GL interface run)	Selected when the commitment accounting GL Interface has been run.

> **Note**
>
> You should run the GL interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL Interface Run or CA GL Interface Run is selected, you cannot rerun the process until resetting the check box. The GL interface check boxes have no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If **GL interface Run** is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the **Off-Cycle Closed** check box is selected.

Balance ID Details

This group box displays the year, quarter, and period applicable to the pay period for each balance ID for which you're maintaining balances.

Related Topics

- PeopleSoft Payroll for North America: Creating Deduction Subsets
- PeopleSoft Payroll for North America: Printing Paychecks and Direct Deposit Advices
- PeopleSoft Payroll for North America: Understanding Employee Balance Adjustments
- PeopleSoft Payroll for North America: Understanding Deductions

(USF) Additional FederalPayroll Info Page

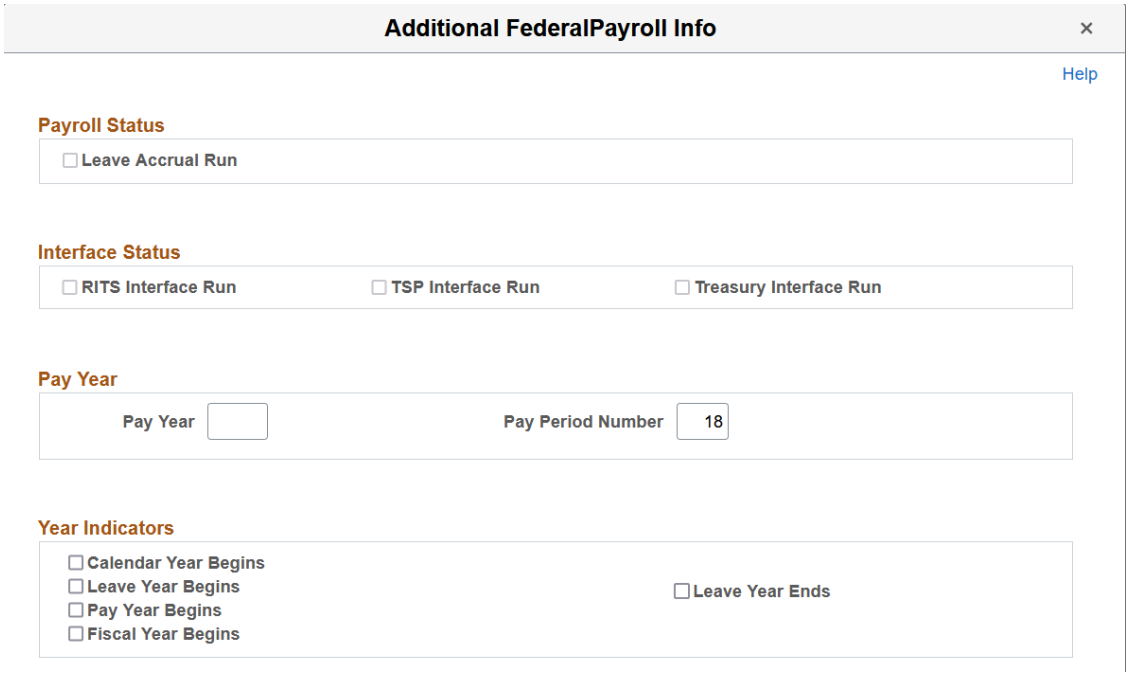
Use the Payroll Status page (GVT_PAY_STATUS_SEC) to indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

Navigation:

Click the **Federal** button on the Pay Calendar Table page.

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

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Payroll Status

Field or Control	Description
Leave Accrual Run	This check box is updated by the Leave Accrual process that you run after payroll is confirmed.

Interface Status

The check boxes in this group box indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar. The system updates these fields.

Pay Year

Field or Control	Description
Pay Year	The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the pay year to which this pay calendar applies.

Year Indicators

The system completes the first four check boxes based on the run control parameters you enter when you run the Calendar Build process. If you need to change these values, you can manually update the calendar after it is built.

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Field or Control	Description
Calendar Year Begins	This check box is used by U.S. federal annual leave accrual processing and for U.S. federal Pay Caps/Limits processing. For USF annual leave accrual processing: If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box. For USF Pay Caps/Limits processing: If earnings are deferred to the next year because the employee exceeds the limits in the current year, the COBOL will try and pay out the deferred earnings on the first payroll of the following year. If this check box is selected, the process uses this date to signify the first payroll of the year.
Leave Year Begins	This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box. **Note:** The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.
Pay Year Begins	This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.
Fiscal Year Begins	This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.
Leave Year Ends	This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Wage Statement Status Page

Use the Wage Statement Status page (PAY_CALENDAR_TBL3) to track the completion of pay statement processes.

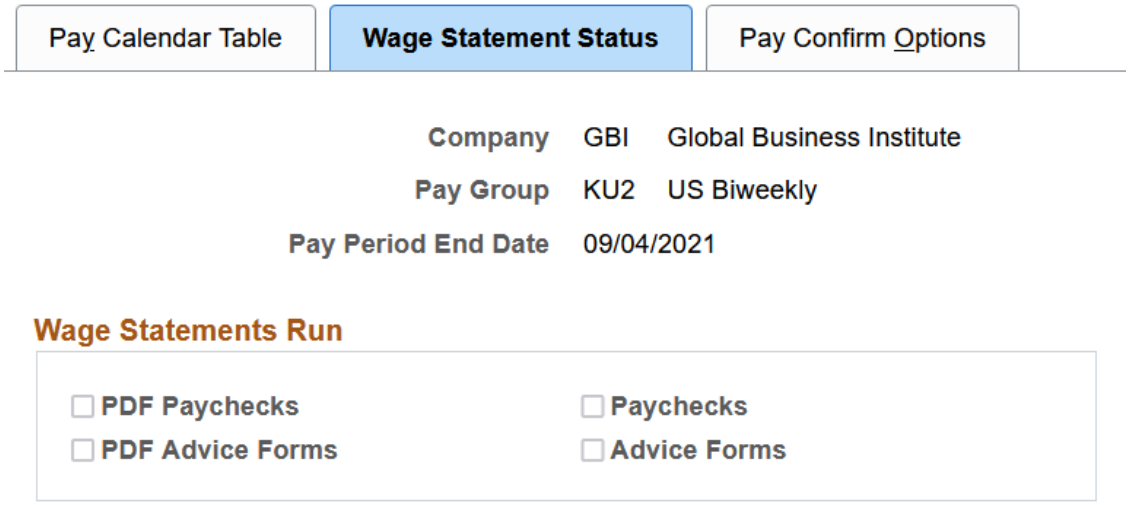
Navigation:

- **Payroll for North America**, and then **Payroll Processing USA**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Wage Statement Status**
- **Payroll for North America**, and then **Payroll Processing CAN**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Wage Statement Status**
- **Payroll for North America**, and then **Payroll Processing USF**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Wage Statement Status**

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- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Calendar Table**, and then **Wage Statement Status**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Calendar Table**, and then **Wage Statement Status**

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



Wage Statements Run

The system selects the check box for each pay statement process that was run successfully for this pay calendar for your reference. Prior to the creation of the direct deposit or pay advice, the check boxes are cleared.

Administrators can view the number of calendars that have completed these processes on the **Payment Status** visualization of the Payroll Operations Analytics dashboards for U.S. and Canada.

See PeopleSoft Payroll for North America: U.S. Payroll Operations Analytics Dashboard and PeopleSoft Payroll for North America: Canada Payroll Operations Analytics Dashboard.

Field or Control	Description
PDF Paychecks	Selected when the Create PDF Paychecks (PYCHKUSA) or Create PDF Paycheques (PYCHQCAN) processes are completed for an on-cycle payroll.
PDF Advice Forms	Selected when the Create PDF Advice (PYDDAUSA) or Create PDF Advice Forms (PYDDACAN) processes are completed for an on-cycle payroll.
Paychecks	Selected when the Print Pay Checks (PAYUSCHK) or PRINT Pay Cheques (PAYCNCHK) processes are completed for an on-cycle payroll.

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Field or Control	Description
Advice Forms	Selected when the Print Advice Forms DDP003 (U.S) or DDP003CN (CAN) processes are completed for an on-cycle payroll.

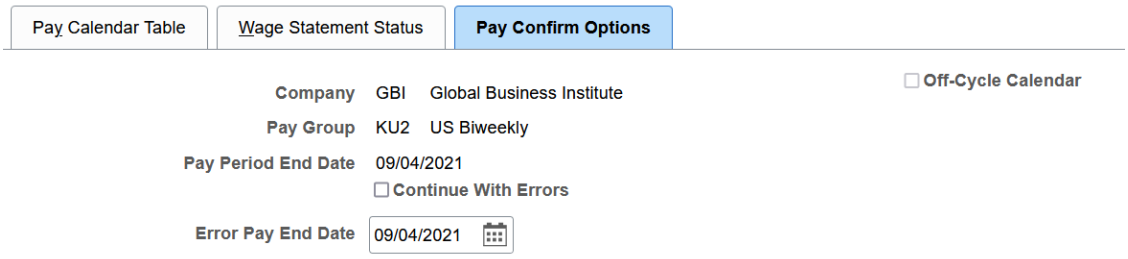
Pay Confirm Options Page

Use the Pay Confirm Options page (PAY_CALENDAR_TBL2) to select whether to bypass payroll messages during the Pay Confirmation process.

Navigation:

- **Payroll for North America**, and then **Payroll Processing USA**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Confirm Options**
- **Payroll for North America**, and then **Payroll Processing CAN**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Confirm Options**
- **Payroll for North America**, and then **Payroll Processing USF**, and then **Create and Load Paysheets**, and then **Review Pay Calendars**, and then **Pay Confirm Options**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Payroll Processing Controls**, and then **Pay Calendar Table**, and then **Pay Confirm Options**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Pay Calendar Table**, and then **Pay Confirm Options**

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



Field or Control	Description
Off-Cycle Calendar	If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is deselected. If you select this option, you must process the pay calculation for the transferred paysheets using the run parameters on the left side of the run control page. If you do not select this option, the system assumes that you are linking the transferred paysheets to an existing off-cycle paysheet that is linked to an on-cycle calendar.

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Field or Control	Description
Continue With Errors	Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.
Error Pay End Date	Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during the regular pay run. Be sure that you have an off-cycle pay calendar set up for the pay end date that you select.

Related Topics

- PeopleSoft Payroll for North America: Setting Up Continue with Errors Processing
- PeopleSoft Payroll for North America: Reviewing Payroll Messages and Correcting Errors

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22

Setting Up Company Tax Tables for North America

(USA) Setting Up the Company State Tax Table

To set up the Company State Tax table, use the Company State Tax Table component (CO_STATE_TAX_TBL) or Agency State Tax Table USF component (CO_STATE_TAX_TBL) and Tax Collector Table component (TAX_COLLECTOR_TBL).

These topics discuss how to set up the Company State Tax Table.

> **Note**
>
> The tax tables discussed in these topics are required for both the Payroll for North America and Payroll Interface applications. The documentation for each of these applications discusses additional tax data setup that is specific to the application.

Pages Used to Set Up the Company State Tax Table

Page Name	Definition Name	Usage
Company State Tax Table - General Page	CO_STATE_TAX_TBL	Set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.
Company State Tax Table - VDI/FLI Page	CO_STATE_TAX_TBL2	Identify the voluntary disability plans associated with the company.
Company State Tax Table - GL Accounts Page	CO_STATE_TAX_TBL3	Enter your general ledger account numbers for state taxes.
Company State Tax Table - Other Programs Page	CO_STATE_TAX_TBL4	Configure company-specific tax parameters for other programs.
Company State Tax Report Page	PRCSRUNCNTRL	Run TAX704 to print information from the Company State Tax Table, which identifies the states in which your company collects and pays taxes.

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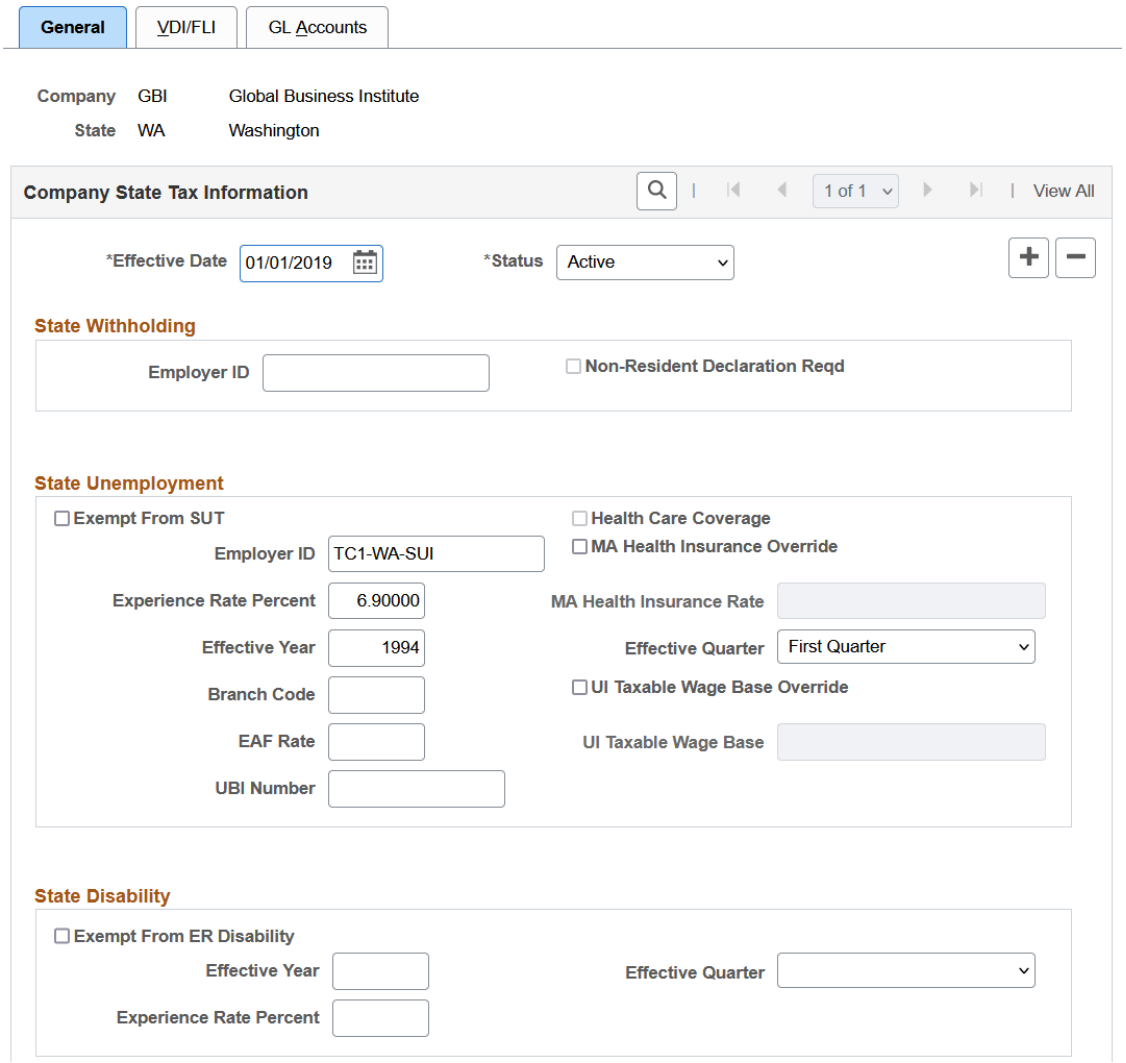
Company State Tax Table - General Page

Use the General page (CO_STATE_TAX_TBL) to set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.

Navigation:

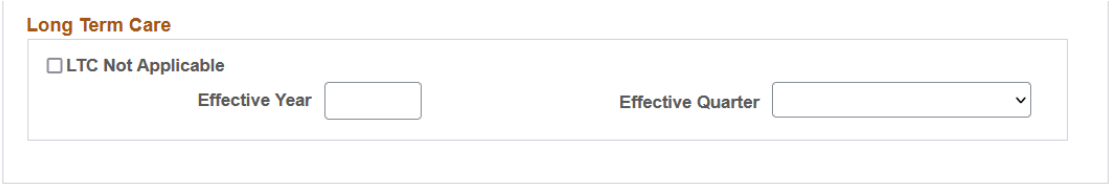
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Company State Tax Table**, and then **General**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Agency State Tax Table USF**, and then **General**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company State Tax Table**, and then **General**

This example illustrates the fields and controls on the Company State Tax Table - General 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 Company State Tax Table - General page (2 of 2). You can find definitions for the fields and controls later on this page.

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The **State** field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

Field or Control	Description
Employer ID	Enter your state employer ID for state withholding.
Non-Resident Declaration Reqd	This check box is selected or deselected by default according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

State Unemployment

Field or Control	Description
Exempt From SUT	Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on the State Tax Data page. See Company State Tax Table - General Page.
Employer ID	Enter your state employer ID for state unemployment.
MA Health Insurance Override	(MA only.) The Massachusetts standard **Health Ins Rate** is set by default from the State Tax table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select this check box and enter the correct Massachusetts **Health Ins Rate.**

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Field or Control	Description
Experience Rate Percent	The experience rate you enter in the **State Unemployment** group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the **Effective Yr/Qtr** field. This enables you to have different rates within a single calendar year. **Note:** You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error 000013 - "The SUT rate for the company and state displayed below was not found in the Company State Tax Table" (as indicated on the message report) during Pay Calculation. This error occurs regardless of the pay end date you are processing.
MA Health Insurance Rate	(MA only.) If you select **Override,** enter the correct **health insurance rate.**
Branch Code	This field is informational for Arizona. TAX860AZ.SQR appends the branch code to the end of the state EIN.
UBI Number (unified business ID number)	If the company you're adding is in Washington State, enter the UBI number assigned. Used for quarterly reporting for companies in the State of Washington only.
EAF Rate (employment administration fund rate)	If the company you're adding is in Washington State, enter the EAF rate used to calculate an additional tax for the Employment Administration Fund, which finances work search assistance and training for the unemployed. Used for quarterly reporting for companies in the State of Washington only.
UI Taxable Wage Base Override and **UI Taxable Wage Base**	An employer's unemployment taxable wage base may vary depending on its unemployment experience rating. To identify a company as subject to the higher unemployment taxable wage base, and override the standard (lower) taxable wage base delivered on the Other Rates page of the State Tax Table entry for the state, first select the **UI Taxable Wage Base Override** check box, and then, in the **UI Taxable Wage Base** field, specify the taxable wage base that applies to the company For example, the standard Rhode Island 2012 taxable wage base is $19,600 for most employers, but employers with an experience rate of 9.79% or higher must pay tax on a higher 2012 taxable wage base of $21,100. To identify the company as subject to the higher unemployment taxable wage base, select the **UI Taxable Wage Base Override** check box, and enter *$21,000* in the **UI Taxable Wage Base** field.

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State Disability

Field or Control	Description
Exempt From ER Disability	Select this check box if employees in this state are exempt from employer-paid state disability tax. This field is for informational purposes only and is not used by the system.
Experience Rate Percent	The experience rate you enter in the **State Disability** group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in **Effective Tax Yr/Qtr.** This enables you to have different rates within a single calendar year. **Note:** You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error 000097 – "The SDI Rate Table entry was not found for the state below" (as indicated on the message report) during Pay Calculation. This error occurs regardless of the pay end date you are processing.
Employer ID	(E&G) Enter the appropriate employer ID for state disability grouping in California, Michigan, and Minnesota. The T002CAHP, T002MIHP, and T002MNHP reports are grouped by employer ID if you enter the employer ID here and select the Separate Tax Report check box on the run control page. The report lists state withholding, state unemployment, and state disability.

Setting Up SUT Exemptions To Generate Data for the TAX810 and TAX860 Reports

The TAX810, and TAX860 reports are generated based on SUT wages. When you select the *Exempt From SUT* field on this page, the system does not generate taxable wages, and the TAX810, and TAX860 reports will contain no data.

Perform the following to generate taxable earnings, enabling the TAX810, and TAX860 reports to produce the required wage detail reporting data, while still remaining exempt from State Unemployment Taxes:

1. Ensure that the **Company Exempt from SUT** field on the Company Table-FICA/Tax Details page is deselected.
2. Leave the **Exempt From SUT** field on the Company State Tax Table - General page deselected.

   These steps should ensure that the **Exempt From SUT** field on the State Tax Data page remains clear for each employee. Verify that the **Exempt From SUT** field is clear on all three pages.
3. Enter a dummy number in the **State Unemployment Employer ID** field on the Company State Tax Table – General page.
4. Enter a value of *0* (zero) in the State Unemployment Experience Rate.

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After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX810 or TAX860 report can report the SUT subject wages.

Long Term Care

This section appears and applies to Washington only.

See PeopleSoft Payroll for North America: Understanding the Washington Long-Term Care Insurance.

Field or Control	Description
LTC Not Applicable (long-term care not applicable)	Select this check box if employees in the company will not be covered by the WA Cares Fund. For employees to be covered the long-term care program, clear this check box.
Effective Year and **Effective Quarter**	Enter the year and quarter when the WA Cares Fund setup becomes effective.

Company State Tax Table - VDI/FLI Page

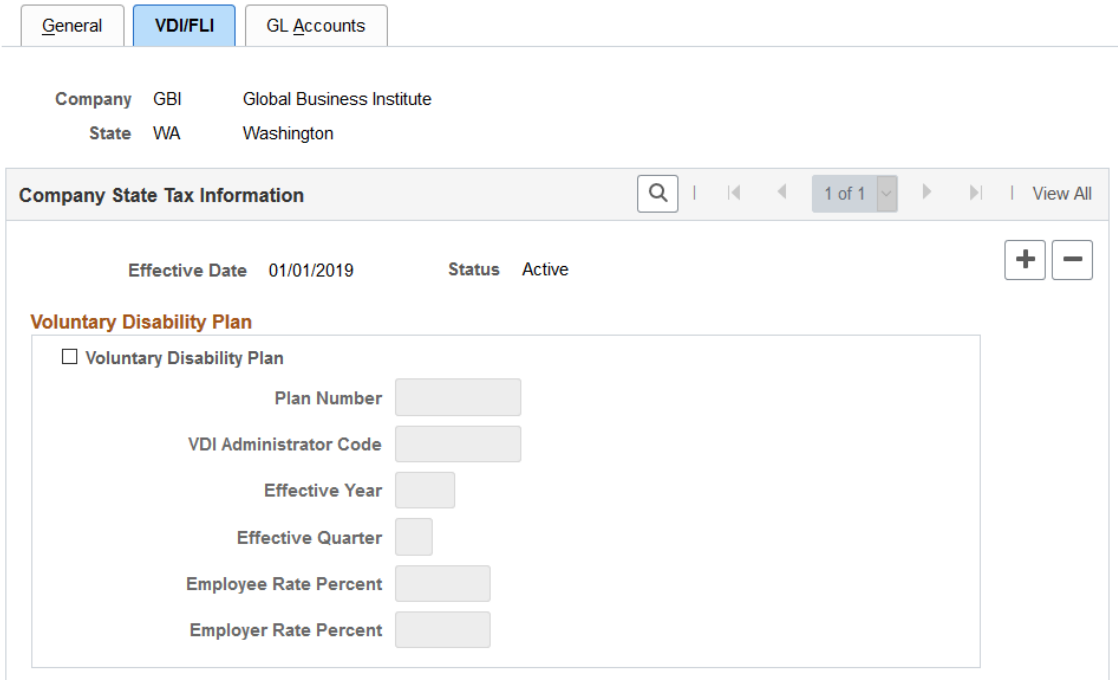
Use the VDI/FLI page (CO_STATE_TAX_TBL2) to identify the voluntary disability plans associated with the company.

Navigation:

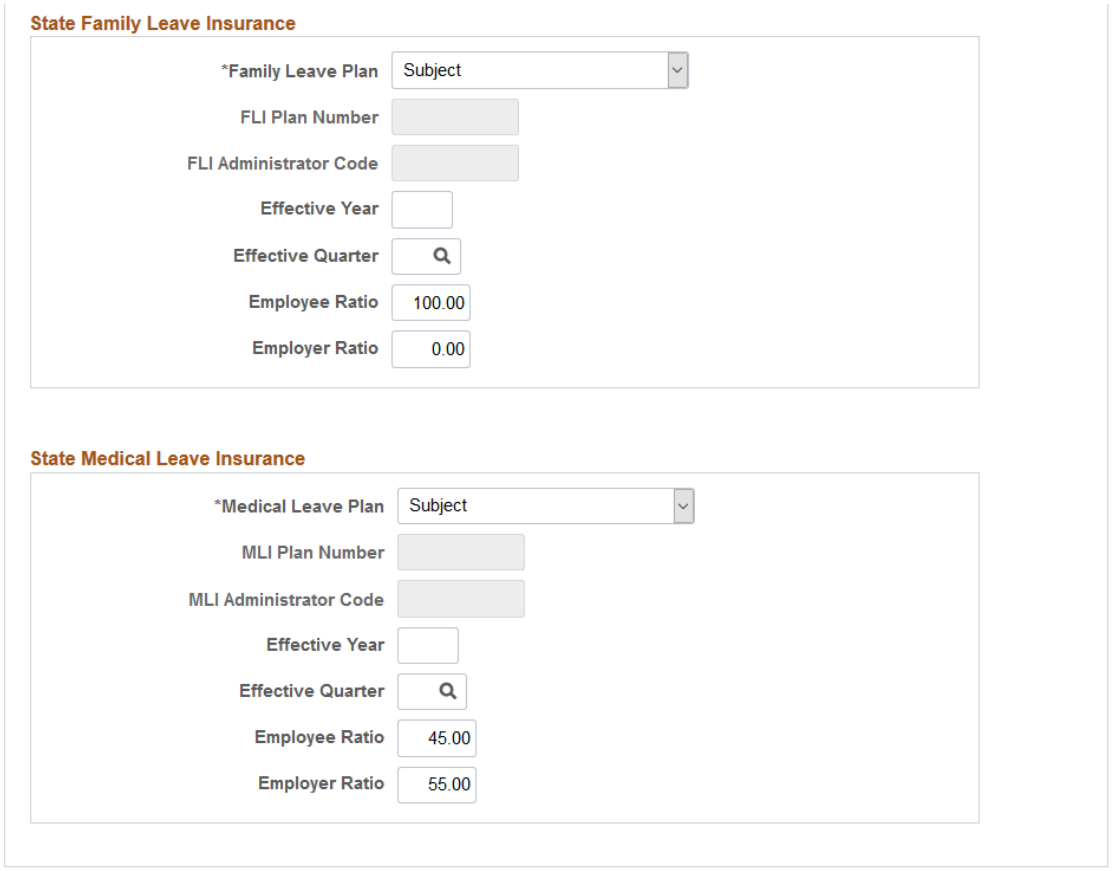
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Company State Tax Table**, and then **VDI/FLI**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Agency State Tax Table USF**, and then **VDI/FLI**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company State Tax Table**, and then **VDI/FLI**

This example illustrates the fields and controls on the Company State Tax Table - VDI/FLI page (1 of 2). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Company State Tax Table - VDI/FLI page (2 of 2). You can find definitions for the fields and controls later on this page.



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This page includes nearly identical sections for setting up information for your voluntary disability plan, and voluntary and state paid leave insurance plans.

> **Note**
>
> Based on the state that is selected, some sections and fields on this page may be displayed or hidden to support state-specific requirements.

Voluntary Disability Plan

This section appears for all states.

Field or Control	Description
Voluntary Disability Plan	Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.
Plan Number	Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on Form W-2.
VDI Administrator Code	Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page.
Employee Rate Percent	Enter the employee-paid rate. **Note:** You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error 000304 – “The VDI Rate Table entry was not found for the state below” (as indicated on the message report) during Pay Calculation. This error occurs regardless of the pay end date you are processing.
Employer Rate Percent	Enter the employer-paid rate. **Note:** You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error 000304 – “The VDI Rate Table entry was not found for the state below” (as indicated on the message report) during Pay Calculation. This error occurs regardless of the pay end date you are processing.

(CA, HI, NJ, NY, PR) To set up VDI with a rate of zero so that you can track the VDI wages, enter *99.99999* as the **Employee Rate Percent** and **Employer Rate Percent** on this page.

State Family Leave Insurance

This section appears for all states, and applies to Massachusetts, New Jersey, New York, and Washington.

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Field or Control	Description
Family Leave Plan	Select the applicable family leave insurance tax status for the company and state. Values are: *Exempt*: Select if employees' earnings are exempt from the family leave insurance tax. *Not Applicable*: Select if the state plan does not apply to the employee. *Subject*: Select if employees' earnings are subject to family leave insurance tax. *Voluntary*: Select if the company has a voluntary family leave insurance plan that covers the employees. This option does not apply to Massachusetts. MA allows voluntary plans, but they are not supported in Payroll for North America.
FLI Plan Number	Enter the plan number of the family leave insurance plan. This field appears if the selected family leave plan is *Voluntary*.
FLI Administrator Code	Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page. This field appears if the selected family leave plan is *Voluntary*.
Employee Rate Percent	(NJ and NY) Enter the employee-paid rate.
Employee Ratio	(MA and WA) Enter the maximum percentage of premium that can be deducted from employees. The total employee and employer ratio values must total to *100.00* percent.
Employer Rate Percent	(NJ and NY) Enter the employer-paid rate.
Employer Ratio	(MA and WA) Enter the percentage of premium to be contributed by employers. The total employee and employer ratio values must total to *100.00* percent.

(NJ, NY) To set up FLI with a rate of zero so that you can track the FLI wages, enter *99.99999* as the **Employee Rate Percent** and **Employer Rate Percent** on this page.

State Medical Leave Insurance

This section appears and applies to Massachusetts and Washington only.

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Field or Control	Description
Medical Leave Plan	Select to indicate that the plan you're defining is a voluntary medical leave plan allowed by the state. Values are: *Exempt*: Select if employees' earnings are exempt from the medical leave insurance tax. *Not Applicable*: Select if the state plan does not apply to the employee. *Subject*: Select if employees' earnings are subject to medical leave insurance tax. (WA) *Voluntary*: Select if the company has a voluntary medical leave insurance plan that covers the employees.
MLI Plan Number	(WA) Enter the plan number of the family leave insurance plan. This field appears if the selected family leave plan is *Voluntary*.
MLI Administrator Code	(WA) Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page. This field appears if the selected family leave plan is *Voluntary*.
Employee Ratio	Enter the maximum percentage of premium that can be deducted from employees. The total employee and employer ratio values must total to *100.00* percent.
Employer Ratio	Enter the percentage of premium to be contributed by employers. The total employee and employer ratio values must total to *100.00* percent.

State Family Medical Leave Insurance

This section appears and applies to Connecticut only.

Field or Control	Description
Family Medical Leave Plan	Select to indicate that the plan you're defining is a family medical leave plan allowed by the state. Values are: *Exempt*: Select if employees' earnings are exempt from the family medical leave insurance tax. *Not Applicable*: Select if the state plan does not apply to the employee. *Subject*: Select if employees' earnings are subject to family medical leave insurance tax. *Voluntary*: Select if the company has a voluntary family medical leave insurance plan that covers the employees.
FMLI Plan Number	Enter the plan number of the family medical leave insurance plan. This field appears if the selected family medical leave plan is *Voluntary*.

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Field or Control	Description
FMLI Administrator Code	Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page. This field appears if the selected family medical leave plan is *Voluntary*.
Effective Year and **Effective Quarter**	Enter the year and quarter when the family medical leave plan setup becomes effective. Do not enter any value in these fields if the selected family medical leave plan is *Subject*.
Employee Rate Percent	Enter the rate for the voluntary plan. The rate for the state plan is stored in the State Tax Table for Connecticut.
Employer Rate Percent	Enter the rate for the voluntary plan to be contributed by employers.

Supported Paid Leave Plans

This table lists state and voluntary paid leave plans and the states in which these plans are supported using the data defined on the VDI/FLI page on the Company State Tax Table.

Tax Class	CT	DC	NJ	NY	MA	WA
Medical Leave Insurance - EE					x	x
Medical Leave Insurance - ER					x	x
Voluntary Med Leave Ins EE						x
Voluntary Med Leave Ins ER						x
Family Leave Insurance - EE			x	x	x	x
Family Leave Insurance - ER		x			x	x
Voluntary Family Leave Ins EE			x	x		x
Voluntary Family Leave Ins ER			x	x		x
Family Medical Leave Ins EE	x					
Vol Family Med Leave Ins EE	x					
Vol Family Med Leave Ins ER	x					

Company State Tax Table - GL Accounts Page

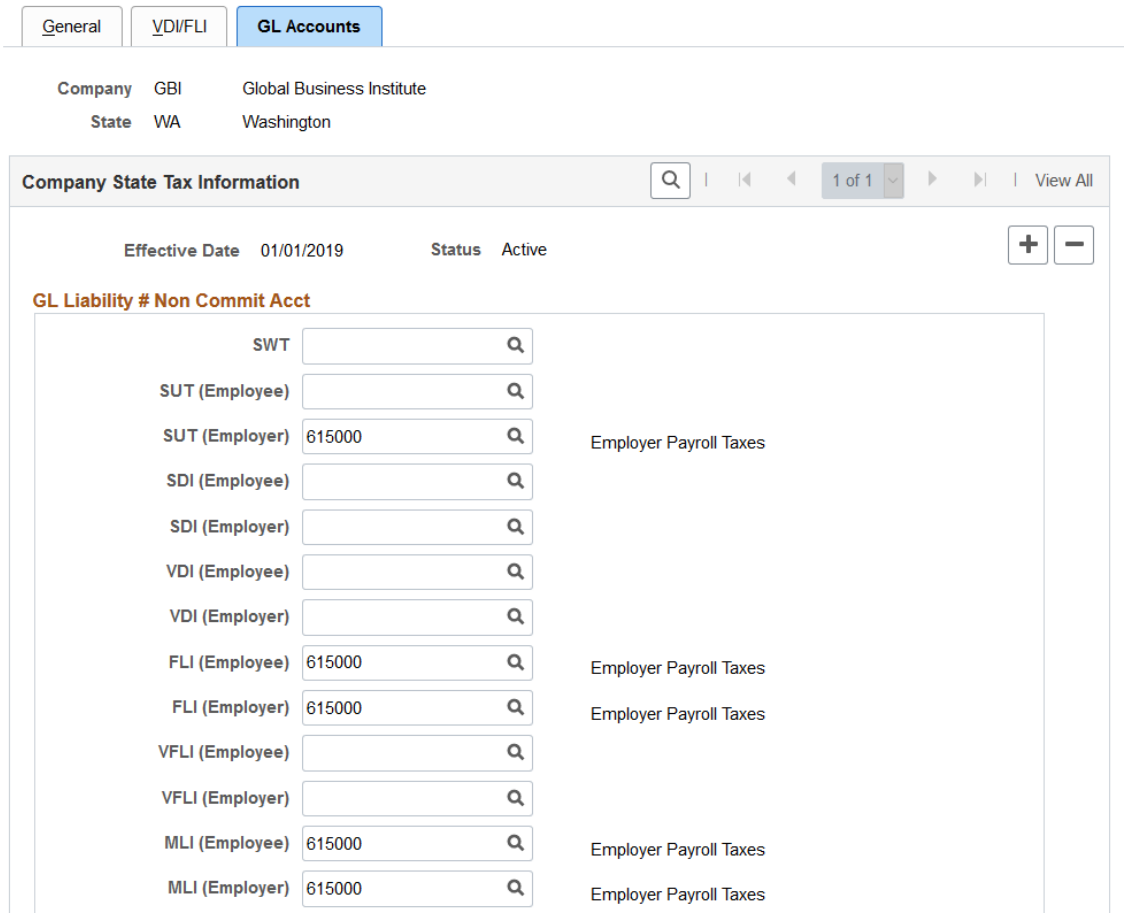
Use the GL Accounts page (CO_STATE_TAX_TBL3) to enter your general ledger account numbers for state taxes.

Navigation:

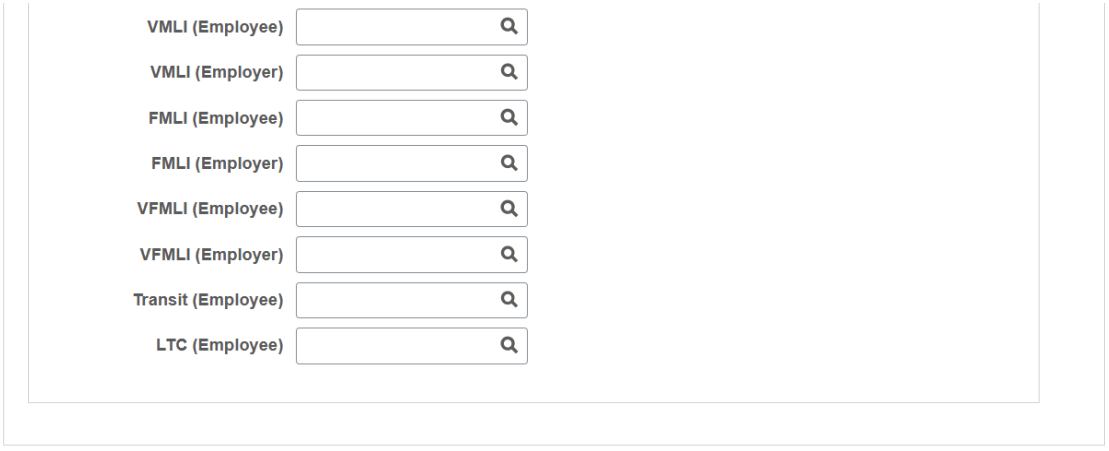
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Company State Tax Table**, and then **GL Accounts**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Agency State Tax Table USF**, and then **GL Accounts**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company State Tax Table**, and then **GL Accounts**

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This example illustrates the fields and controls on the Company State Tax Table - GL Accounts 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 Company State Tax Table - GL Accounts page (2 of 2). You can find definitions for the fields and controls later on this page.



Enter the general ledger account numbers, if applicable, for the following company liabilities:

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GL Liability # Non Commit Acct

Field or Control	Description
SWT	State Withholding liabilities.
SUT (Employee)	State Unemployment employee liabilities.
SUT (Employer)	State Unemployment employer liabilities.
SDI (Employee)	State Disability employee liabilities.
SDI (Employer)	State Disability employer liabilities.
VDI (Employee)	Voluntary Disability employee liabilities.
VDI (Employer)	Voluntary Disability employer liabilities.
FLI (Employee)	State family leave insurance employee liabilities.
FLI (Employer)	State family leave insurance employer liabilities.
VFLI (Employee)	Voluntary family leave insurance employee liabilities.
VFLI (Employer)	Voluntary family leave insurance employer liabilities.
MLI (Employee)	State medical leave insurance employee liabilities.
MLI (Employer)	State medical leave insurance employer liabilities.
VMLI (Employee)	Voluntary medical leave insurance employee liabilities.
VMLI (Employer)	Voluntary medical leave insurance employer liabilities.
FMLI (Employee)	Family medical leave insurance employee liabilities.
FMLI (Employer)	Family medical leave insurance employer liabilities.
VFMLI (Employee)	Voluntary family medical leave insurance employee liabilities.
VFMLI (Employer)	Voluntary family medical leave insurance employer liabilities.
Transit (Employee)	(OR) State transit tax employee liabilities.
LTC (Employee)	(WA) State long-term care insurance employee liabilities.

Other Programs – GL Liability Acct

This section is applicable to the Program Funding Configuration only. It appears if one or more programs are associated with the listed state on the PeopleSoft Payroll for North America: Program ID Association Page. It lists all tax classes of the state's program that are available as of the effective date.

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> **Note**
>
> If changes are made to the program's list of tax classes, you need to add a new row on this page to see the updates. The updates will not show if you just modify the effective date of an existing row in Correct History mode.

Field or Control	Description
Liability Account	Select the general ledger account number for the corresponding tax class. It is the customer's responsibility to update this information. Tax class rows of inactive programs are read-only.

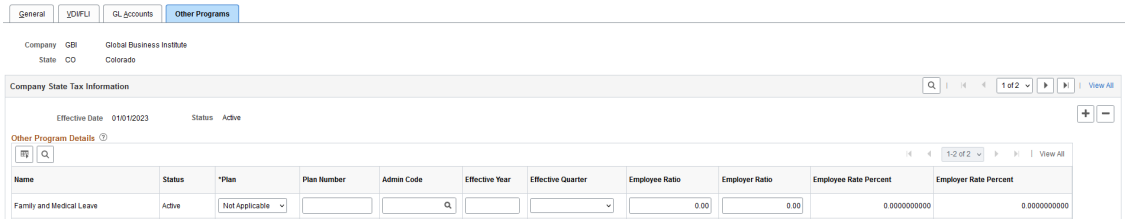
Company State Tax Table - Other Programs Page

Use the Other Programs page (CO_STATE_TAX_TBL4) to configure company-specific tax parameters for other programs.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Company State Tax Table**, and then **Other Programs**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Agency State Tax Table USF**, and then **Other Programs**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company State Tax Table**, and then **Other Programs**

This example illustrates the fields and controls on the Company State Tax Table - Other Programs page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> This page is applicable to the Program Funding Configuration feature only.

This page appears if one or more programs have been set up and in effect for the state on the PeopleSoft Payroll for North America: Program ID Association Page. It lists all the state's programs that are available as of the effective date.

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> **Note**
>
> If changes are made to the program definition or program association details, you need to add a new row on this page to see the updates. The updates will not show if you just modify the effective date of an existing row in Correct History mode.

Inactive program rows are displayed as read-only.

Field or Control	Description
Name	Displays the funding program associated with the state.

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Field or Control	Description
Plan	Displays or select the plan type the employees are enrolled in. Values are: *Exempt:* The employee is exempted from participation in the corresponding program, and the employee's earnings are exempt from the program's taxes. *Not Applicable* (default): The corresponding program does not apply to the employee. With this tax status, the employer does not withhold program taxes from the employee or pay the employer taxes. *Subject:* The employee is covered by the corresponding program, and their earnings are subject to taxation. *Voluntary:* The employee is covered by an equivalent plan rather than by a state program. The employee's earnings are subject to premium deduction. Employers with private or equivalent plans must use *Voluntary* as the plan type. (DE only) *Waiver-State:* The employee is exempted from participation in the Delaware Paid Leave state program. Employees who are part-time (working less than 25 hours per week) or not expected to work for 12 months (for example, students who work over the summer only) can submit a Waiver form (signed by both the employee and employer) to be excluded from the program. (DE only) *Waiver-Voluntary:* The employee is exempted from participation in the Delaware Paid Leave private program. As mentioned previously, employees who are part-time or not expected to work for 12 months can submit a waiver form to be excluded from the program. When a value is specified in this field for a program and you have selected the **Automatic Employee Tax Data** option on the Application Fundamentals: Installation Table - Products Page, the system will automatically default the program's **Tax Status** field in the Other Programs - Details section of the PeopleSoft Payroll for North America: State Tax Data Page for newly hired or transferring employees to match this value that is specified for the associated company.
Plan Number	Displays or select the plan number.
Admin Code	Displays or select the code that identifies the administrator of the plan. You maintain administrator codes on the PeopleSoft Payroll for North America: VDI/FLI Administrator Table Page.

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Field or Control	Description
Effective Year and **Effective Quarter**	Displays or enter the year and quarter when the plan setup becomes effective. Do not enter any value in these fields if the selected plan is *Subject*.
Employee Ratio and **Employer Ratio**	Displays or enter the ratio of premium to be contributed by the employee and the employer. The sum of ratio values specified on this page must be 100. These fields become editable if the **Company State Tax Data Option** field is set to *Ratio* on the PeopleSoft Payroll for North America: Program ID Association Page. Default values specified from the Program ID Association page are prepopulated in these fields when the program appears for the first time on this page. For any new row that is added, data is prepopulated from the previous row.
Employee Rate Percent and **Employer Rate Percent**	Displays or enter the employee-paid rate and employer-paid rate. These fields become editable if the **Company State Tax Data Option** field is set to *Rate Percent* on the PeopleSoft Payroll for North America: Program ID Association Page. Default values specified from the Program ID Association page are prepopulated in these fields when the program appears for the first time on this page. For any new row that is added, data is prepopulated from the previous row. **Important:** If you have an equivalent or a private plan, you must set up the **Employee Rate Percent** and **Employer Rate Percent** values in these fields. Do not set up these values on the State Tax Table entry for the state. If you do, your values will be overridden the next time PeopleSoft delivers updates to the State Tax Table entry for the state.

Supported Paid Leave Plans

This table lists state and voluntary paid leave plans and the states in which these plans are supported using the data defined on the Other Programs page on the Company State Tax Table.

These paid leave plans are implemented using Program Funding Configuration. For more information about the Program Funding Configuration feature, see PeopleSoft Payroll for North America: Working With Program Funding Configuration.

Tax Class	CO	OR	ME	DE
Paid Fam Med Leave Ins EE	x	x	x	
Paid Fam Med Leave Ins ER	x	x	x	
Vol Paid Fam Med Leave Ins EE	x	x	x	
Vol Paid Fam Med Leave Ins ER	x	x	x	

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Tax Class	CO	OR	ME	DE
Paid Parental Leave EE				x
Paid Parental Leave ER				x
Paid Medical Leave EE				x
Paid Medical Leave ER				x
Paid FC/QE Leave EE				x
Paid FC/QE Leave ER				x
Vol Paid Parental Leave EE				x
Vol Paid Parental Leave ER				x
Vol Paid Medical Leave EE				x
Vol Paid Medical Leave ER				x
Vol Paid FC/QE Leave EE				x
Vol Paid FC/QE Leave ER				x
Paid Parental Leave EE-Reclass				x
Paid Parental Leave ER-Reclass				x
Paid Medical Leave EE-Reclass				x
Paid Medical Leave ER-Reclass				x
Paid FC/QE Leave EE-Reclass				x
Paid FC/QE Leave ER-Reclass				x
Vol Paid Parental Lv EE-Reclas				x
Vol Paid Parental Lv ER-Reclas				x
Vol Paid Medical Lv EE-Reclass				x
Vol Paid Medical Lv ER-Reclass				x
Vol Paid FC/QE Lv EE-Reclass				x
Vol Paid FC/QE Lv ER-Reclass				x

See Also

PeopleSoft Payroll for North America: Understanding the Colorado Family and Medical Leave Insurance Program

PeopleSoft Payroll for North America: Understanding the Paid Leave Oregon Program

PeopleSoft Payroll for North America: Understanding the Maine Paid Family and Medical Leave

PeopleSoft Payroll for North America: Understanding the Delaware Paid Leave Program

Supported Child Care Plans

This table lists state child care plans and the states in which these plans are supported using the data defined on the Other Programs page on the Company State Tax Table.

These plans are implemented using Program Funding Configuration. For more information about the Program Funding Configuration feature, see PeopleSoft Payroll for North America: Working With Program Funding Configuration.

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Tax Class	VT
Child Care EE	x
Child Care ER	x

See Also

PeopleSoft Payroll for North America: Understanding the Vermont Child Care Contribution

(USA) Setting Up the Company Local Tax Table

To set up the company local tax table, use the Company Local Tax Table component (COMP_LOCAL_TAX_TBL).

This topic discusses how to set up company local tax table entries.

> **Note**
>
> You must complete the Company Local Tax table before local tax data for employees is entered because the locality field on the PeopleSoft Payroll for North America: Local Tax Data Page is edited against this table.

> **Note**
>
> The tax tables discussed in these topics are required for both the Payroll for North America and Payroll Interface applications. The documentation for each of these applications discusses additional tax data setup that is specific to the application.

Pages Used to Define an Entry for the Company Local Tax Table

Page Name	Definition Name	Usage
Company Local Tax Table Page	COMP_LOCAL_TAX_TBL	Set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.
Company Local Tax Report Page	PRCSRUNCNTRL	Run TAX705 to print information from the Company Local Tax Table, which identifies the localities for which your organization collects and pays taxes.

Company Local Tax Table Page

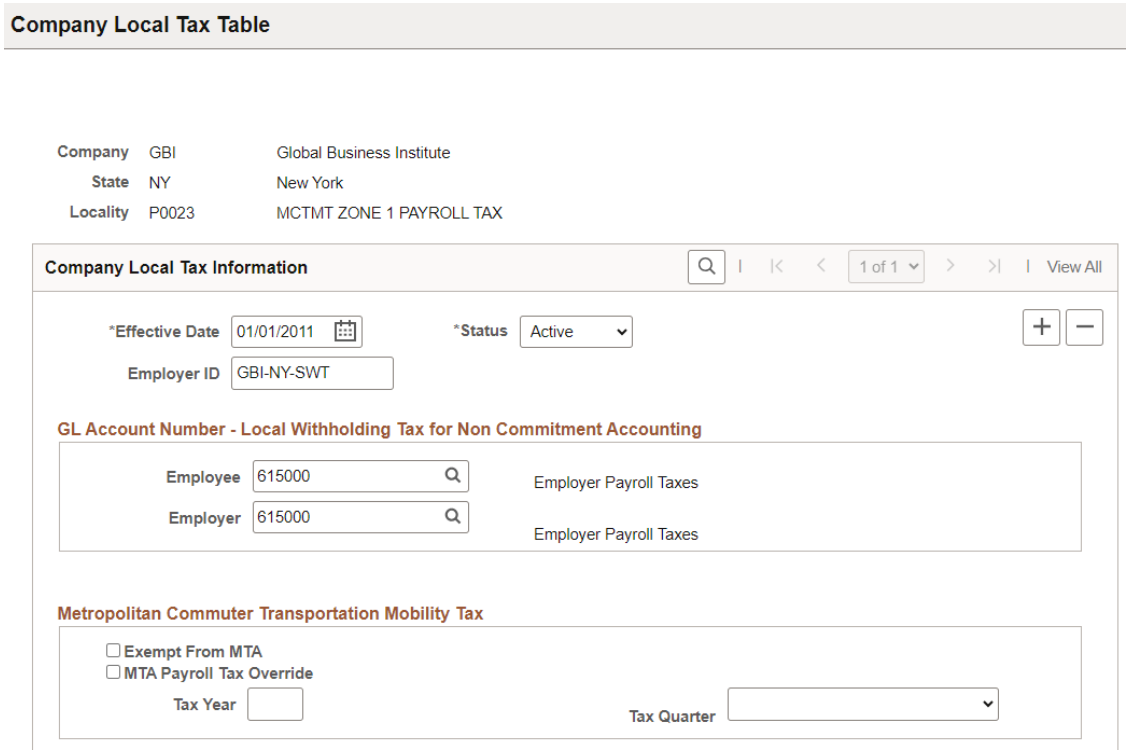
Use the Company Local Tax Table page (COMP_LOCAL_TAX_TBL) to set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.

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Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Local Taxes**, and then **Company Local Tax Table**, and then **Company Local Tax Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Local Taxes**, and then **Agency Local Tax Table USF**, and then **Company Local Tax Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company Local Tax Table**, and then **Company Local Tax Table**

This example illustrates the fields and controls on the Company Local Tax Table page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Employer ID	This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax table.

GL Account Number - Local Withholding Tax for Non Commitment Accounting

These accounts are General Ledger accounts for use with local withholding tax; they are only used by the PayGL01 process. Only GL information not subject to Commitment Accounting would use these accounts.

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Field or Control	Description
Employee and **Employer**	If you have general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

Metropolitan Commuter Transportation Mobility Tax

(New York) This group box appears for all state and locality entries, but it applies only to the state of New York. Fields within the group box are accessible for data entry only when **State** = *NY* and **Locality** = *P0023* or *P0047.*

> **Note**
>
> Before entering data in this group box, you must determine the company's MTA tax status, the maximum MTA tax rate, and the minimum quarterly threshold. Refer to the New York State Department of Taxation and Finance website for more information on the New York Metropolitan Commuter Transportation Mobility Tax (MCTMT). See http://www.tax.ny.gov/bus/mctmt/emp.htm.

Field or Control	Description
Exempt from MTA (exempt from Metropolitan Commuter Transportation Mobility Tax)	Select this check box if the company is an employer type that is exempt from paying MTA tax. When this check box is selected, taxable wages will not be accumulated and tax will not be calculated, therefore the **MTA Payroll Tax Override** check box becomes unavailable and the **MTA Payroll Tax Rate** hidden. Some examples of employers that are exempt from paying the tax include: an agency or instrumentality of the United States; the United Nations; an interstate agency or public corporation created under an agreement or compact with another state or Canada; any eligible educational institution.
MTA Payroll Tax Override	Select this check box if the company is subject to MTA tax, but whose payroll expense for the quarter qualifies it for a lower tax rate than the maximum MTA tax rate that is delivered as the tax rate in the Local Tax Table entry for Locality NY P0023 or P0047.
MTA Payroll Tax Rate	Enter the tax rate that applies to the company. Enter *0.00000* if the company's payroll expense for all covered employees for the calendar quarter falls below the minimum threshold that requires payment of the tax.
Tax Year and **Tax Quarter**	Enter the year and quarter for which the lower tax rate or exempt status applies.

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(CAN) Setting Up the Canadian Company Tax Table

To set up Canadian company tax information, use the Company Tax Table component (CO_CAN_TAX_TABLE) and the Wage Loss Plan Table component (WAGELS_PLN_TBL).

These topics discuss how to set up the Canadian Company Tax Table.

> **Note**
>
> The tax tables discussed in these topics are required for both the Payroll for North America and Payroll Interface applications. The documentation for each of these applications discusses additional tax data setup that is specific to the application.

Pages Used to Set Up the Canadian Company Tax Table

Page Name	Definition Name	Usage
Company Tax Table Page	CAN_USR_TAX_TABLE1	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.

Company Tax Table Page

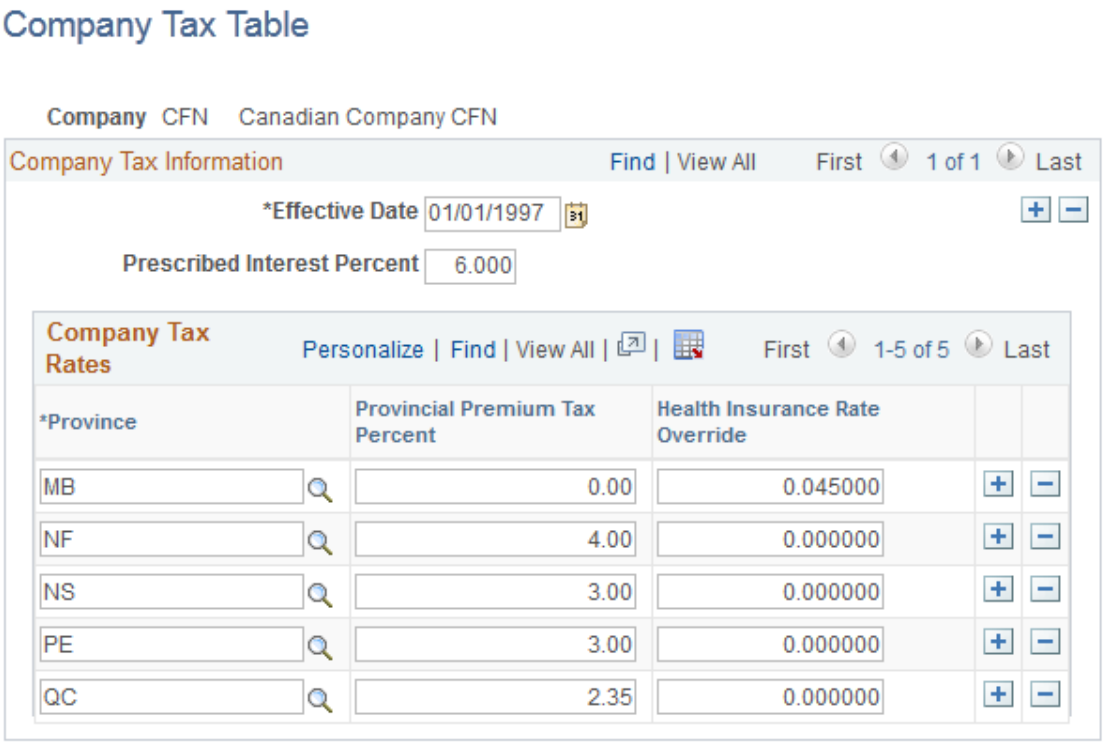
Use the Company Tax Table page (CAN_USR_TAX_TABLE1) to identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Canadian Taxes**, and then **Company Tax Table**, and then **Company Tax Table**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Company Tax Table CAN**, and then **Company Tax Table**

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

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Note

It is your responsibility to update all rates on the Company Tax Table.

Company Tax Information

Field or Control	Description
Prescribed Interest Percent	If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government. **Note:** It is your responsibility to update the **Prescribed Interest Percent** field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Company Tax Rates

Use these fields to enter company-specific overrides to provincial tax rates.

Important

The system ignores override values of zero. If the override value is *0.00,* the system calculates taxes using the rates on the provincial tax tables.

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Field or Control	Description
Province	Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.
Provincial Premium Tax Percent	Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.
Health Insurance Rate Override	Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

Defining Tax Locations

To define tax locations, use the Tax Location Table component (TAX_LOCATION_TBL). Use the TAX_LOCATION_TBL component interface to load data into the tables for this component.

These topics provide an overview of tax locations and discuss how to define tax locations.

> **Note**
>
> The tax tables discussed in these topics are required for both the Payroll for North America and Payroll Interface applications. The documentation for each of these applications discusses additional tax data setup that is specific to the application.

Pages Used to Define Tax Locations

Page Name	Definition Name	Usage
Tax Location Table - Address Page	TAX_LOCATION_TBL1	Establish the locations for which you process payroll and taxes.
Tax Location Table – State/ Province/Locality Page	TAX_LOCATION_TBL2	Associate a province or any number of states, localities, and linked localities with the tax location code.
Tax Location Report Page	PRCSRUNCNTL	Generate PAY718 that lists information from the Tax Location table.

Understanding Tax Locations

The system sets up federal, state, and local employee tax data and tax distribution data according to the information you specify in the Tax Location table.

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In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

> **Note**
>
> If you've selected **Automatic Employee Tax Data** on the Product Specific Page of the Installation table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.
>
> Note that if the **Use State Residence for Local** option is selected, the system does not select the **Resident** check box automatically on the newly added local tax data row when 1) an employee transfers to a different work location in the same resident state, or 2) a new employment instance is added for a different work location in the same resident state. Refer to the PeopleSoft Payroll for North America: Understanding Resident Locality in Local Tax Data for more information.

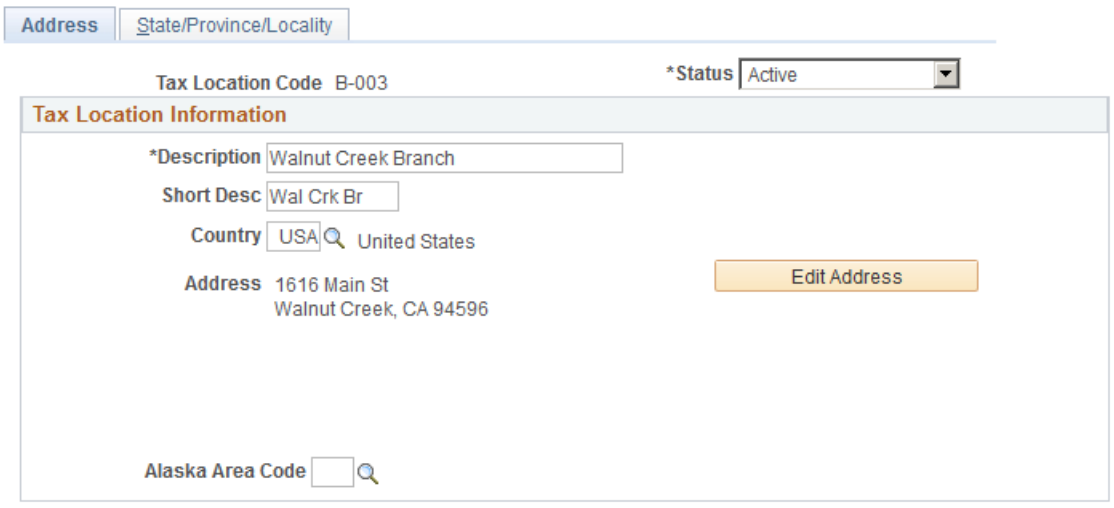
Tax Location Table - Address Page

Use the Tax Location Table - Address page (TAX_LOCATION_TBL1) to establish the locations for which you process payroll and taxes.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Tax Location Table**, and then **Address**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Canadian Taxes**, and then **Tax Location Table**, and then **Address**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Tax Location Table**, and then **Address**

This example illustrates the fields and controls on the Tax Location Table - Address page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Tax Location Code	Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.
Alaska Area Code	If applicable, select an Alaskan area code.

> **Note**
>
> If you select **Automatic Employee Tax Data** on the Installation table and assign a Tax Location ID to each employee in the Job data, each employee's tax data is set by default on the Employee Tax Data page and the Employee Tax Distribution page.
>
> Note that if the **Use State Residence for Local** option is selected, the system does not select the **Resident** check box automatically on the newly added local tax data row when 1) an employee transfers to a different work location in the same resident state, or 2) a new employment instance is added for a different work location in the same resident state. Refer to the PeopleSoft Payroll for North America: Understanding Resident Locality in Local Tax Data for more information.

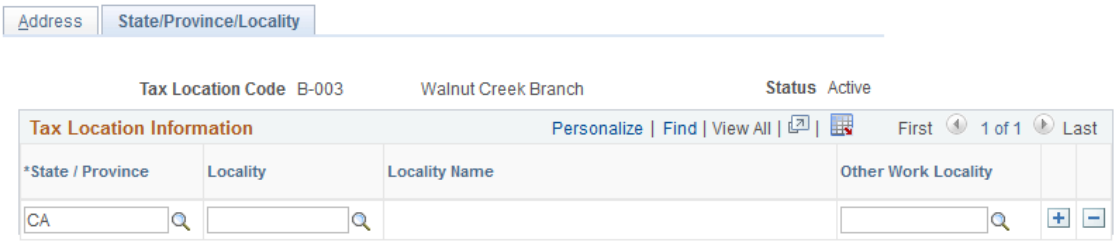
Tax Location Table − State/Province/Locality Page

Use the Tax Location Table − State/Province/Locality page (TAX_LOCATION_TBL2) to associate a province or any number of states, localities, and linked localities with the tax location code.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Federal/State Taxes**, and then **Tax Location Table**, and then **State/Province/Locality**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Canadian Taxes**, and then **Tax Location Table**, and then **State/Province/Locality**
- **Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll**, and then **Tax Location Table**, and then **State/Province/Locality**

This example illustrates the fields and controls on the Tax Location Table - State/Province/Locality page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
State / Province	Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any. The states you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.
Locality	The localities you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.
Other Work Locality	Use this field only where multiple local taxes apply in one location, such as: • Paducah, KY and McCracken County, KY. • Earned Income Tax, and Emergency and Municipal Service Tax in Pennsylvania. To form further links in a locality chain: – Add another row with the same state. – Enter the other work locality from the previous row in Locality. – Enter the new work locality. **Note:** You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

> **Note**
>
> **Locality** and **Other Work Locality** are not required in Canada, because a Canadian employee can be taxed in only one province at a time, and there are no locality taxes in Canada.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Understanding Job Data
- PeopleSoft Payroll for North America: Understanding Split Local Tax Distribution for KY, AL, and OR

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23

Setting Up Vendors

Understanding Vendor Tables

This topic discusses vendors and the integration between HCM and PeopleSoft Payables.

Vendors

A vendor is any agency or organization that the company sends money to on behalf of a worker or that the company uses to withhold money from a person's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the Vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integration with Payables

Payables, Payroll for North America and Human Resources, Manage Base Benefits use Integration Broker to populate each other's Vendor tables.

> **Note**
>
> If you are using PeopleSoft Payables to pay your vendors, we recommend that you enter and update vendors in the Vendor table through PeopleSoft Payables and export the Vendor table to PeopleSoft Human Resource Management System (HCM).

> **Warning**
>
> If you update vendors through the HCM tables, the contact information is exported to the Payable system. However, any changes to existing vendor bank information that are made through HCM will not be exported to the Payables system.

Integration Points

Before using the integration to maintain the Vendor table, configure the Integration Broker nodes and activate the appropriate queues, handlers, and routings for these service operations:

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Service Operation	Description
VENDOR_FULLSYNC	Payables publishes all contents of the Vendor table to the HCM Vendor table.
VENDOR_SYNC	Payables publishes updates in the Vendor table to the HCM Vendor table.

To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository on My Oracle Support.

For more information, see the product documentation for *PeopleTools: Integration Broker Service Operations Monitor* and the Enterprise Components.

Related Topics

- Identifying Integrations for Your Implementation
  PeopleSoft uses PeopleSoft Integration Broker to integrate HCM applications with:
- PeopleSoft Payroll for North America: Maintaining Vendor Information

Entering Vendor Information

To enter vendor information, use the Vendor Control (VENDOR_CONTROL), Vendor Information (VNDR_ID), Provider/Vendor Table (PROVIDER_TABLE), Payee Table (GARNISH_PAYEE_TBL), and Payee Table USF (GVT_GARNISH_PAYEE) components.

These topics provide an overview of and discuss how to set up vendor setup pages.

Pages Used to Set Up Vendors

Page Name	Definition Name	Usage
AP Vendor Control Page	VNDR_CNTRL	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information Page	VNDR_ID1	Enter basic vendor information.
Addresses Page	VNDR_ADDRESS	Enter a vendor's address information.
Alternate Names Page	VNDR_ADDR_ALTN	Enter any alternate name for use on payments.
Phone Information Page	VNDR_ADDR_PHN	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email Address Page	VNDR_ADDR_EMAILID	Enter a vendor's email address.
Locations Page	VNDR_LOC	Enter address and remittance information.
Bank Accounts Page	VNDR_BANK_ACCOUNT	Enter banking information for the vendor.

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Page Name	Definition Name	Usage
Bank Address Page	VNDR_BANK_ACCT2	Enter the bank's address information. The bank's **Country** defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.
Phone Details Page	VNDR_BANK_ACCT3	Enter phone information for the bank.
Comments Page	VNDR_LOC_COMMENTS	Enter notes or comments about locations.
Payment Options Page	VNDR_PAY	Enter payment processing rules for the vendor location.
Contacts Page	VNDR_CNTCT	Enter a vendor's contact person. Enter more than one phone number if necessary.
Phone Information Page	VNDR_CNTCT_PHN	Enter a contact's telephone information.
Policy Information Page	VNDR_POLICY	Enter information about policies and whom to contact about them.
(USF) Garnishment Payee Table Page	GVT_GARN_PAYEE	Enter garnishment payee contact information for U.S. federal government.
(USF) GVT Employee Distribution Page	GVT_GARN_DIST_SEC	Enter garnishment payee distribution information for U.S. federal government.

Understanding Vendor Pages

To enter vendor information, complete the following pages:

- AP Vendor Control
- Vendor Information
- Addresses
- Locations
- Contacts
- Policy Information

AP Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

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Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Locations

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

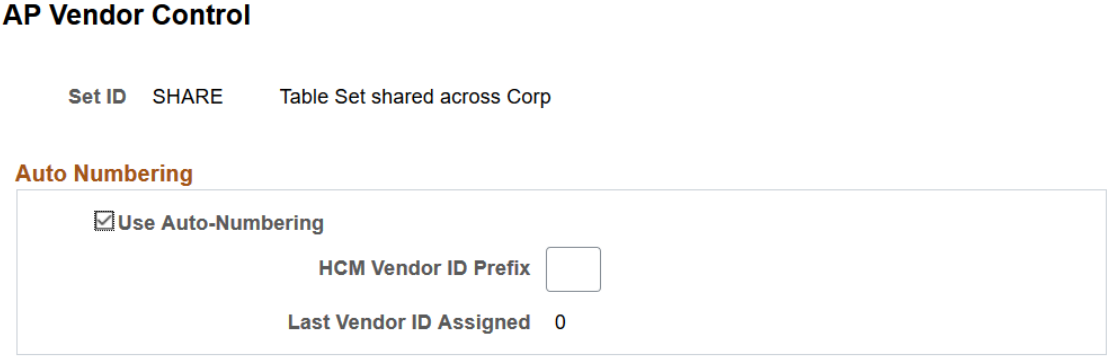
AP Vendor Control Page

Use the AP Vendor Control page (VNDR_CNTRL) to identify the prefix assigned to the vendor in PeopleSoft Payables.

Navigation:

Set Up HCM, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendors**, and then **Vendor Control**, and then **AP Vendor Control**

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



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Field or Control	Description
Use Auto-Numbering	PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.
HCM Vendor ID Prefix	If you selected the auto-numbering check box, enter a prefix that is used identify HCM vendors.

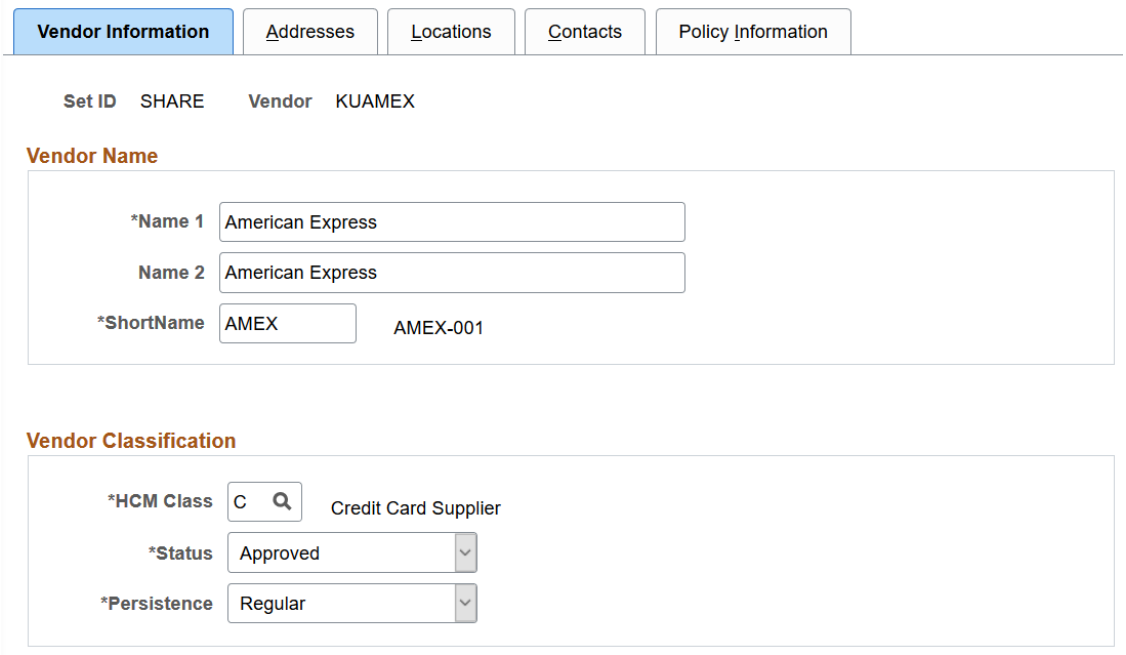
Vendor Information Page

Use the Vendor Information page (VNDR_ID1) to enter basic vendor information.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendors**, and then **Vendor Information**, and then **Vendor Information**
- **Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plans and Providers**, and then **Providers/Vendors Table**, and then **Vendor Information**, and then **Vendor Information**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Garnishments**, and then **Payee Table**, and then **Vendor Information**, and then **Vendor Information**

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



Field or Control	Description
Name 1	Enter the payee name as it should appear on the check.

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Field or Control	Description
HCM Class (HCM classification)	This field identifies the HCM classification used to create views so you see the appropriate vendors on the appropriate tables. It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers. Available values are: • *Credit Card Supplier (C)* • *General Deduction (D)* • *Garnishment Payee (G)* • *National Health Service Provider (H)* • *Industrial Insurance Board Provider (I)* • *Imp Partner Provider (M)* • *General Provider (P)* • *Tax Collector (T)* For benefit providers, select *P* for General Provider.
Status	For HCM vendors, select *Approved*. The other values are used by Payables.
Persistence	For HCM vendors, select *Regular*. The other values are used by Payables.

Addresses Page

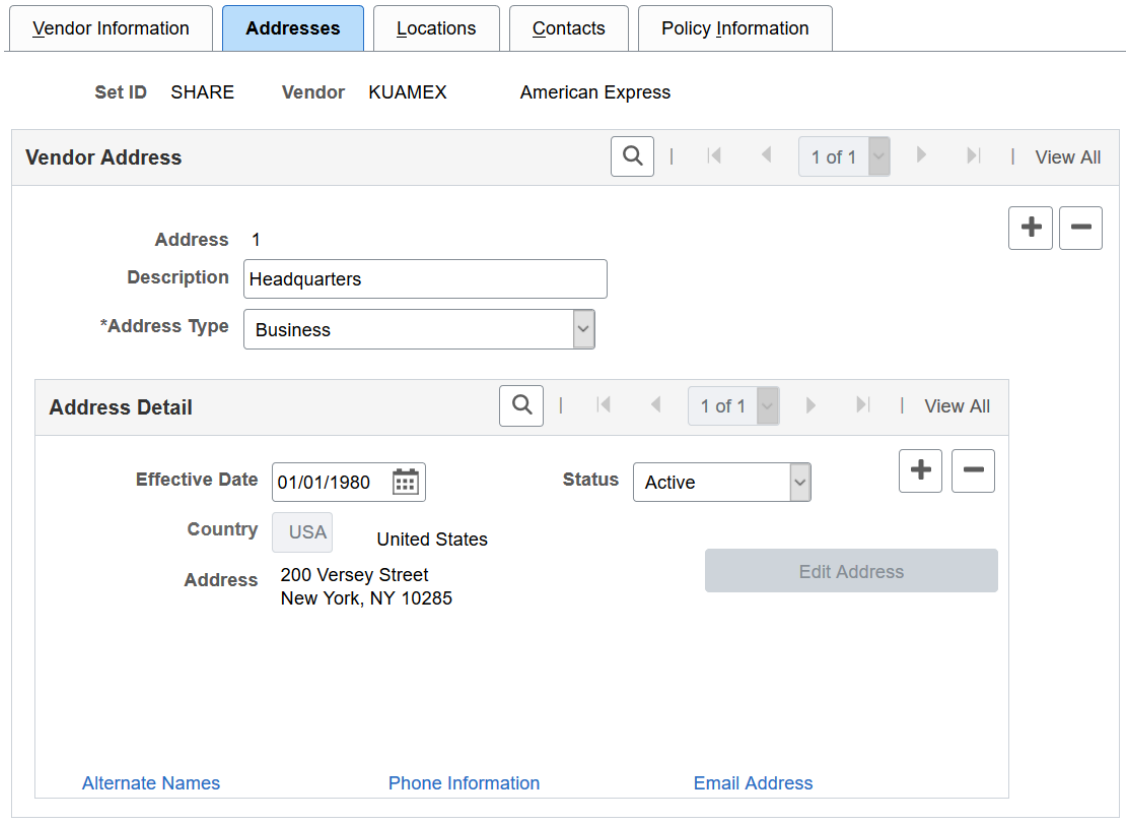
Use the Addresses page (VNDR_ADDRESS) to enter a vendor's address information.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendors**, and then **Vendor Information**, and then **Addresses**
- **Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plans and Providers**, and then **Providers/Vendors Table**, and then **Addresses**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Garnishments**, and then **Payee Table**, and then **Addresses**

This example illustrates the fields and controls on the Vendor Information - Addresses page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Address Type	Enter the one or more addresses for the vendor. If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers. *Premium Payment* and *Remittance* are the only valid address types for deduction recipients. If any other address type is displayed for this vendor, contact your Accounts Payable department. *Premium Payment* generally applies to benefit deductions and *Remittance* applies to all other types of deductions including taxes.
Alternate Names	Click to enter any alternate name for user on payments on the Alternate Names Page.
Phone Number	Enter a vendor's phone information for addresses on the Phone Information page (VNDR_ADDR_PHN). You can enter more than one phone number per address.
Email Address	Enter a vendor's email address on the Email Address page (VNDR_ADDR_EMAILID).

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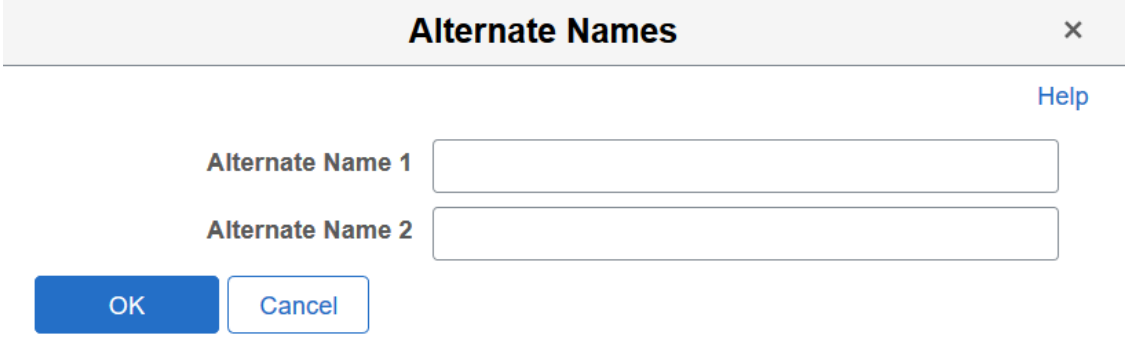
Alternate Names Page

Use the Alternate Names page (VNDR_ADDR_ALTN) to enter any alternate name for use on payments.

Navigation:

Click the **Alternate Names** link on the Vendor Information - Addresses page.

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



Field or Control	Description
Alternate Name 1 and **Alternate Name 2**	When the system generates payments for the location using this address, Payables needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Locations Page

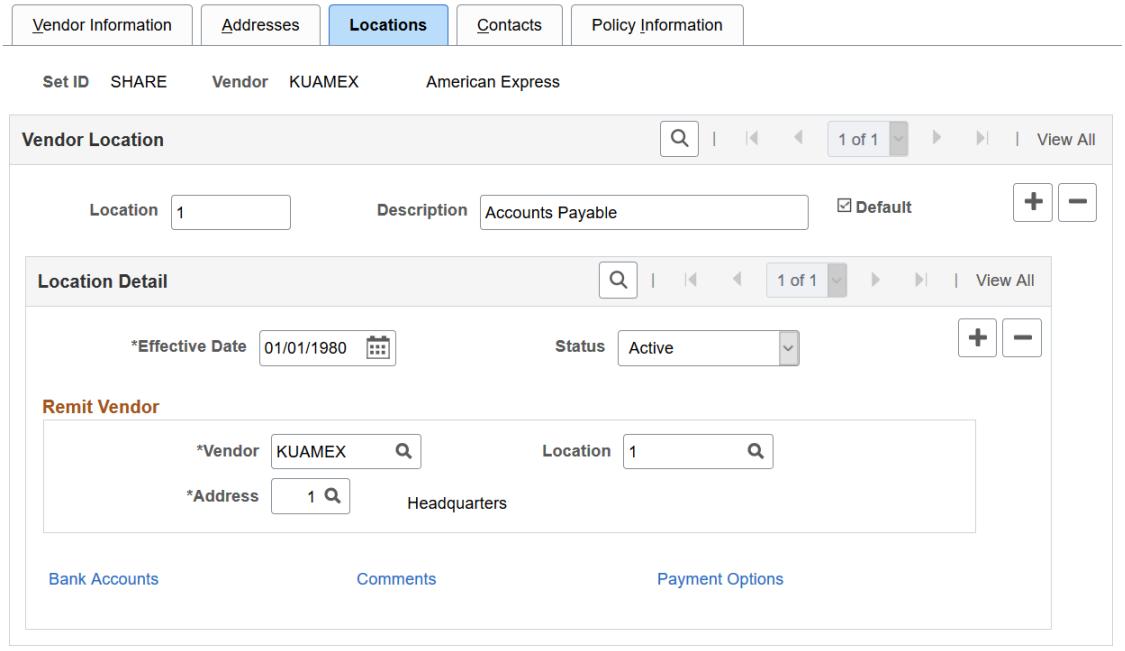
Use the Locations page (VNDR_LOC) to enter address and remittance information.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendors**, and then **Vendor Information**, and then **Locations**
- **Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plans and Providers**, and then **Providers/Vendors Table**, and then **Locations**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Garnishments**, and then **Payee Table**, and then **Locations**

This example illustrates the fields and controls on the Vendor Information - Locations page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Location	Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.
Default	Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.
Remit Vendor	This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.
Bank Accounts	Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.
Comments	Click this link to display the Comments page.
Payment Options	Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Bank Accounts Page

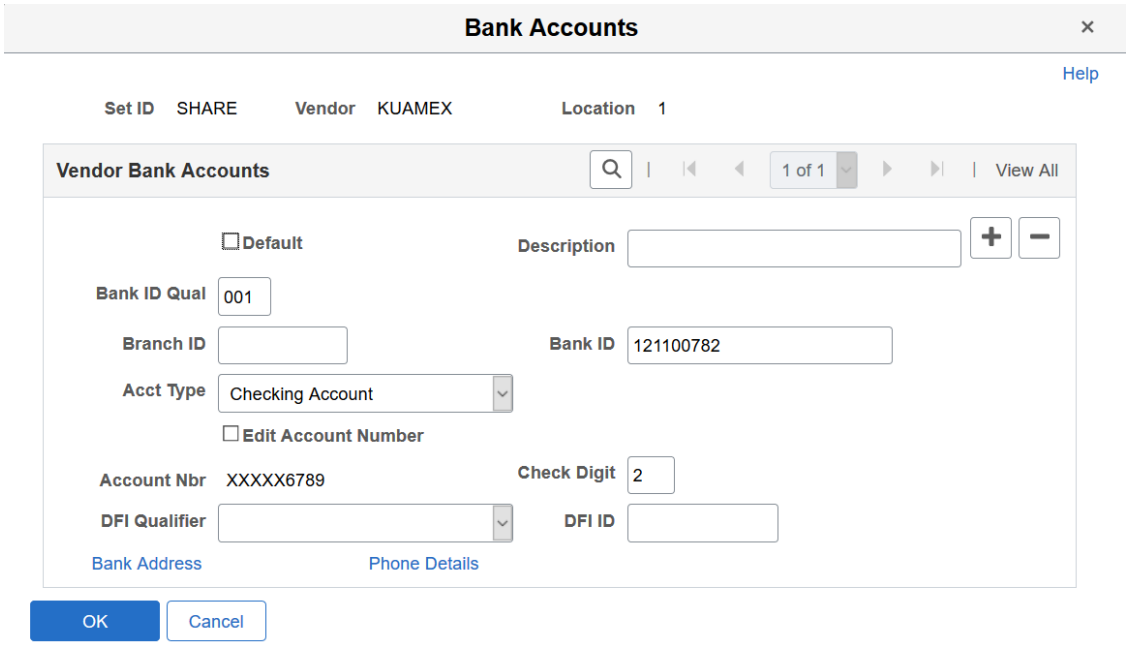
Use the Bank Accounts page (VNDR_BANK_ACCOUNT) to enter banking information for the vendor.

Navigation:

Click the **Bank Accounts** link on the Vendor Information - Locations page.

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



Field or Control	Description
Default	The **Default** check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.
Bank ID Qual	Enter the country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.
Branch ID	Enter the branch ID for the bank, if appropriate.
Bank ID	Enter the ID for the bank.
Acct Type (account type)	Select the account type for the bank, for example, *Bond*, *Checking Account*, and *Life Insurance*.
Edit Account Number	Select to update the account number. This field appears together with the **Account Nbr** 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. When selected, the existing read-only number is cleared from the field for you to enter a new one.

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Field or Control	Description
Account Nbr (account number)	Enter the vendor's bank account number. If data encryption is enabled and the encryption process is run for the VNDR_BANK_ACCT 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. Also, the account number appears as masked on this page. An exception to this is when the user is assigned the *Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the VNDR_BANK_ACCT record. In this case, the user sees the unmasked account number. Understanding Data Encryption for Payroll for North America.
Check Digit	The check digit used by the bank.
DFI Qualifier	If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the **DFI ID** field. • *Transit Number:* The DFI ID is exactly 9 digits, plus check digit calculation. • *Swift ID:* The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code. • *CHIPS ID:* The DFI ID is 3 or 4 digits. • *Canadian Bank Branch/Institute* and *Mutually Defined:* No validation for DFI ID. The **DFI Qualifier** determines the format of the bank's **DFI ID.**
DFI ID	The bank's **DFI ID.** The format is determined by the value displayed in the **DFI Qualifier** field.
Bank Address	Enter the bank address on the Bank Address page (VNDR_BANK_ACCT2).
Phone Details	Enter phone information on the Phone Details page (VNDR_BANK_ACCT3).

Payment Options Page

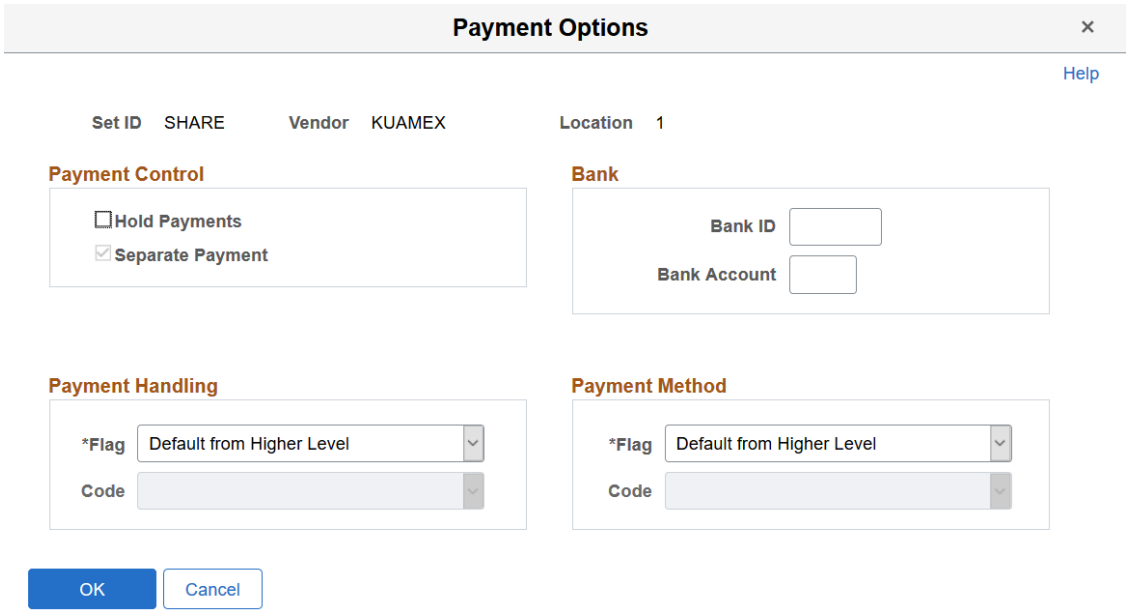
Use the Payment Options page (VNDR_PAY) to enter payment processing rules for the vendor location.

Navigation:

Click **Payment Options** on the Vendor Information - Locations page.

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

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Payment Control

Field or Control	Description
Hold Payments	If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.
Separate Payment	If this check box is selected, PeopleSoft Payables creates a separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Field or Control	Description
Bank ID	The code for the bank from which you want to make payments for this vendor.
Bank Account	The account from which payments will be made to this vendor.

Payment Handling

Field or Control	Description
Flag	This field determines the payment handling instructions. • *Default from Higher Level:* The payment handling instructions for the vendor come from the control hierarchy. • *Specify at this Level:* The payment handling instruction for the vendor appears in the **Code** field.

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Field or Control	Description
Code	If you select *Specify at this Level* in the **Flag** field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor: • *High Dollar Payment.* • *Internal Distribution.* • *Regular Payments.* • *Route to Purchasing.*

Payment Method

Field or Control	Description
Flag	This field determines the payment method: • *Default from Higher Level:* The payment method for the vendor comes from the control hierarchy. • *Specify at this Level:* The payment method for the vendor appears in the **Code** field.
Code	If you select Specify at this Level in the **Flag** field, this field displays the payment method for this vendor: • *Automated Clearing House.* • *Customer Initiated Draft.* • *Direct Debit.* • *Draft - Customer EFT.* • *Electronic Funds Transfer (EFT).* • *Giro - EFT.* • *Giro - Manual.* • *Letter of Credit.* • *Manual Check.* • *System Check.* • *Treasury Wire Flat File.* • *Vendor Initiated Draft.* • *Wire Report.*

Contacts Page

Use the Contacts page (VNDR_CNTCT) to enter a vendor's contact person.

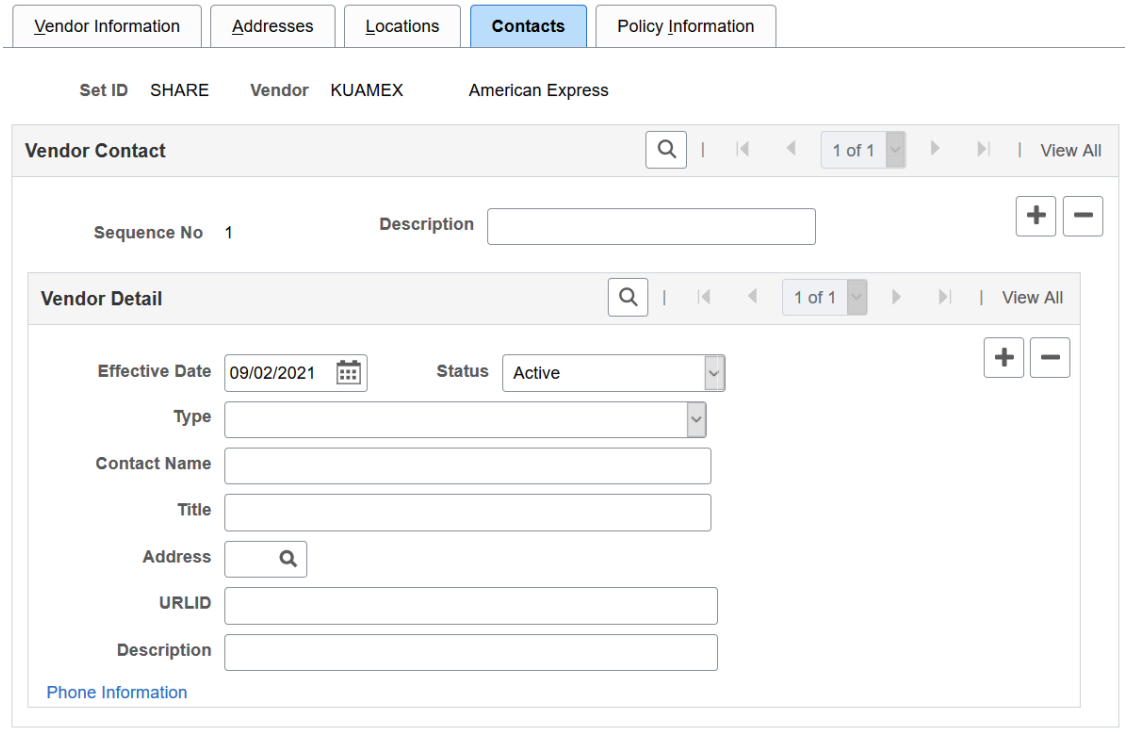
Enter more than one phone number if necessary.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendors**, and then **Vendor Information**, and then **Contacts**
- **Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plans and Providers**, and then **Providers/Vendors Table**, and then **Contacts**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **Garnishments**, and then **Payee Table**, and then **Contacts**

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This example illustrates the fields and controls on the Vendor Information - Contacts page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Sequence No (sequence number)	This number is automatically assigned to this contact.
Type	Select the type of contact.
Address	Select one of the addresses that you entered on the Addresses page.
URLID	Enter the contact's website address.
Phone Information	Click to enter phone information on the Phone Information page (VNDR_CNTCT_PHN).

Policy Information Page

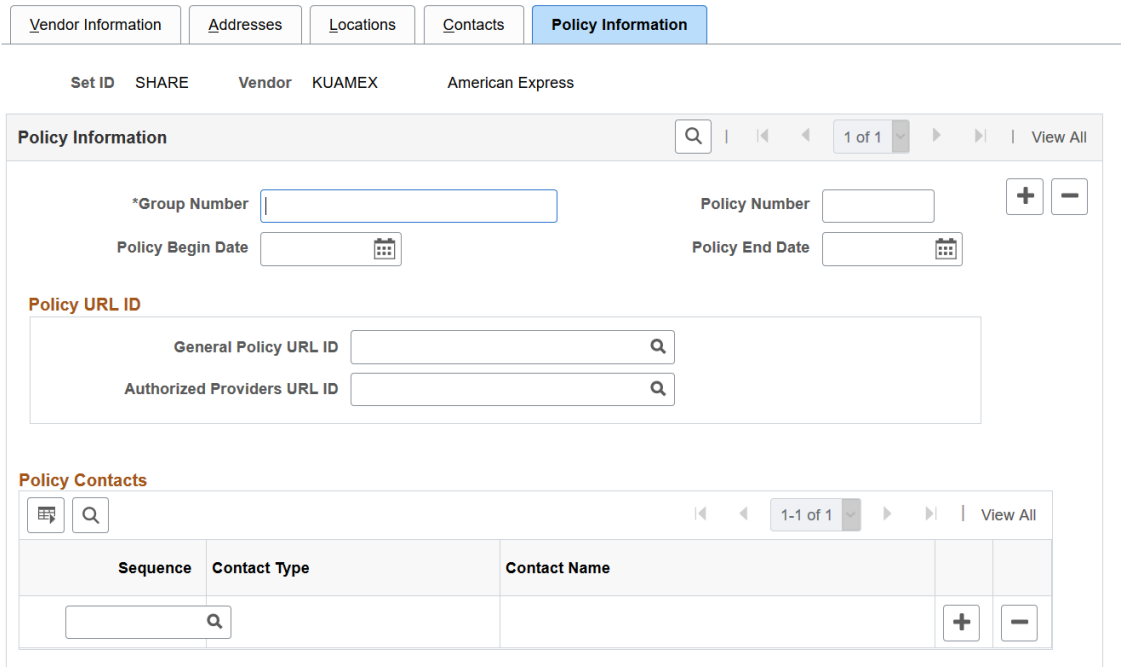
Use the Policy Information page (VNDR_POLICY) to enter information about policies and whom to contact about them.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plans and Providers**, and then **Providers/Vendors Table**, and then **Policy Information**
- **Set Up HCM**, and then **Product Related**, and then **Payroll for North America**, and then **AP-Vendor**, and then **Vendor Information**, and then **Policy Information**

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

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Field or Control	Description
General Policy URL ID	Select the vendor's website address that provides general policy information.
Authorized Providers URL ID	Select the vendor's website address that contains a list of authorized participating providers
Sequence	Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the **Contact Name** automatically appears.

(USF) Garnishment Payee Table Page

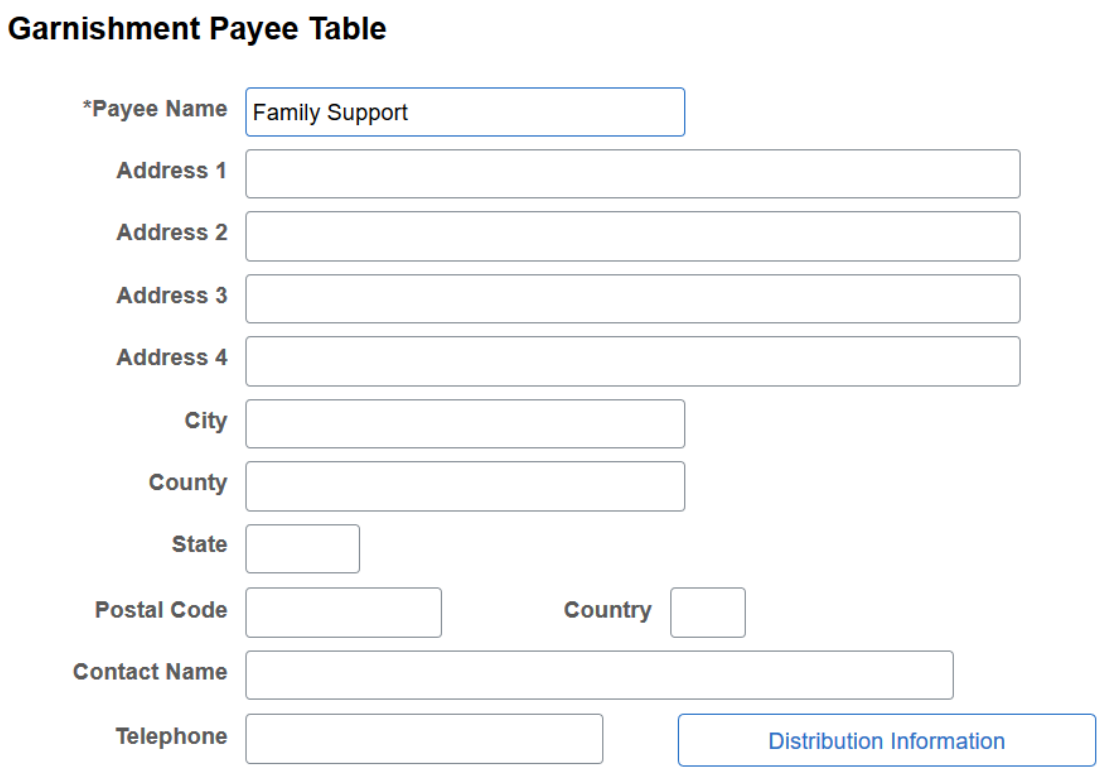
Use the Garnishment Payee Table page (GVT_GARN_PAYEE) to enter garnishment payee contact information for the U.S. federal government.

Navigation:

Set Up HCM, and then **Product Related**, and then **Payroll for North America**, and then **Garnishments**, and then **Payee Table USF**, and then **Garnishment Payee Table**

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

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Field or Control	Description
Distribution Information	Click this button to access the GVT Employee Distribution page.

(USF) GVT Employee Distribution Page

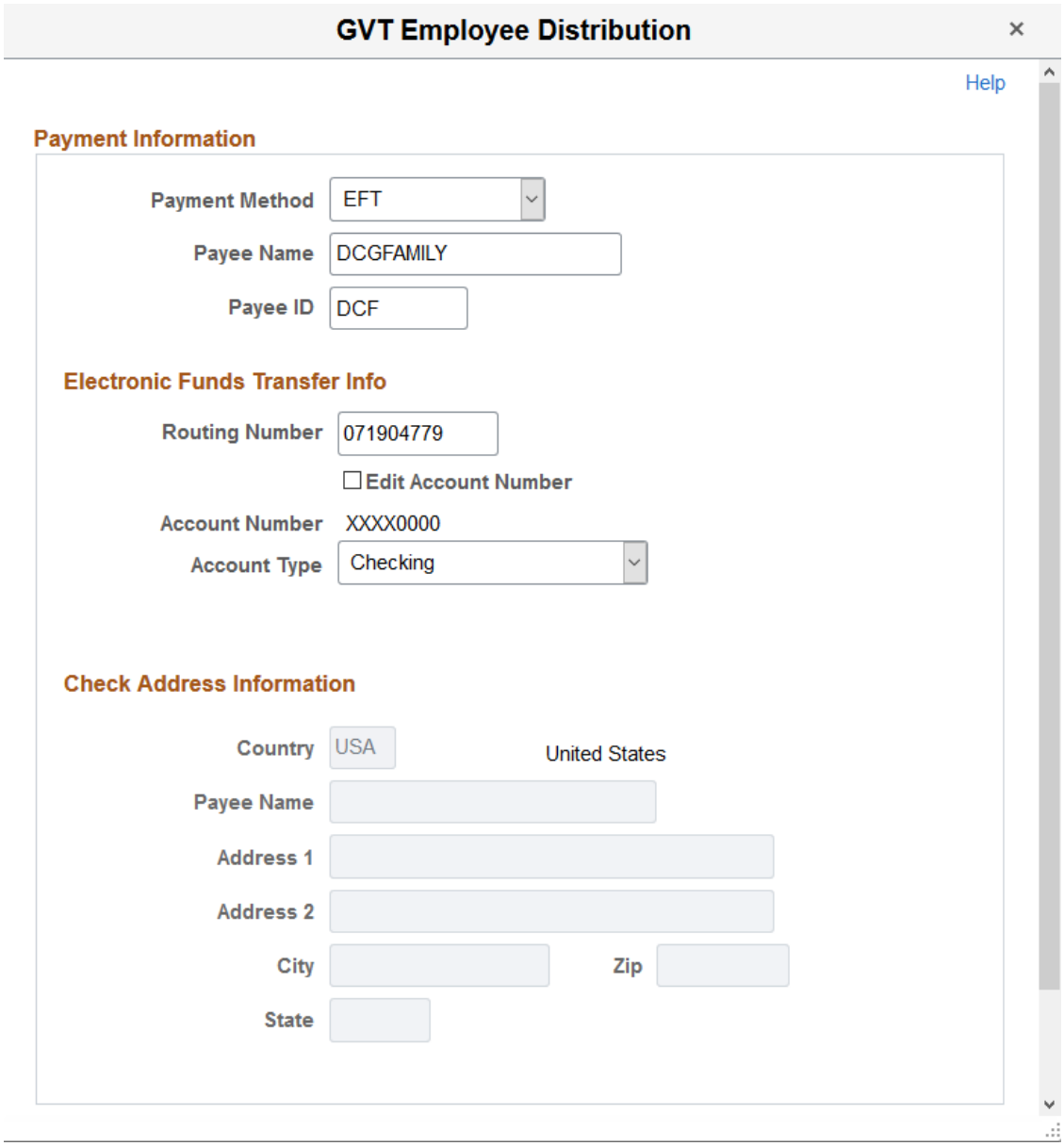
Use the GVT Employee Distribution page (GVT_GARN_DIST_SEC) to enter garnishment payee distribution information for U.S. federal government.

Navigation:

Click the **Distribution Information** button on the Garnishment Payee Table page.

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

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Enter the payment information.

Payment Information

Field or Control	Description
Payment Method	Values are: *Check* *EFT* *None*

Electronic Funds Transfer Info

Enter the electronic funds transfer information. This section becomes editable when the selected payment method is *EFT.*

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All fields are required in this section.

Field or Control	Description
Edit Account Number	Select to update the bank account number. This field appears when the encryption process has been run and the account number previously existed. When selected, the existing read-only account number is cleared from the field for you to enter a new one.
Account Number	Enter the bank account number. If data encryption is enabled and the encryption process is run for the GVT_GARN_PAYEE 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. Also, the account number appears as masked on this page. An exception to this is when the user is assigned the *Bank Account Admin* role, and this role is defined on the Grant Unmasked Access Page for the GVT_GARN_PAYEE record. In this case, the user sees the unmasked account number.

Check Address Information

Enter the check address information. This section becomes editable when the selected payment method is *Check* or *None.*

All fields are required in this section for the *Check* payment method, except the **Address 2** field.

Related Topics

- PeopleSoft Payroll for North America: Deduction Distribution Information Page
- PeopleSoft Payroll for North America: Deduction Distribution Information Page

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24

Setting Up HCM Lockdown Framework

Understanding HCM Lockdown Framework

The HCM Lockdown Framework feature allows you to lock down the data of selected components during payroll processing or according to a defined schedule. Locked data can only be accessed in View mode, and updates cannot be made until the lock is released. This framework supports schedule-based locking for all components and process-based locking for Global Payroll, Absence Management, and Payroll for North America.

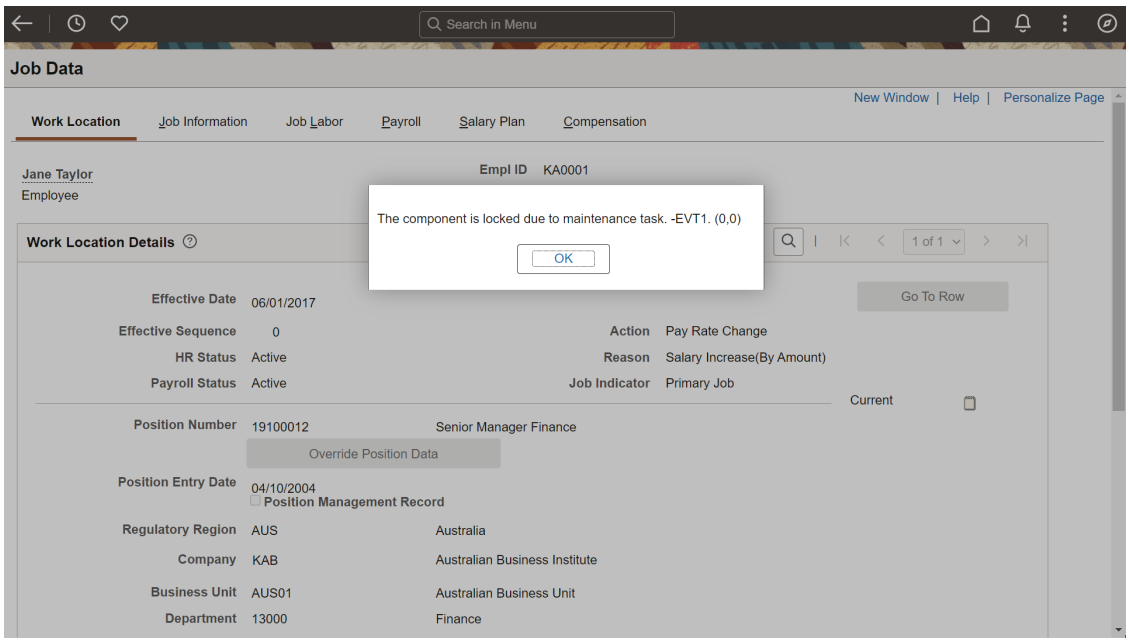
Administrators can control access to key pages that might affect a process result, for example in Global Payroll: PositiveInput, Job Data, Earnings/Deductions Assignments.

There are two types of Component Lockdown:

- Process Lockdown: In process lockdown, the decision of when to lock down a component is driven by a process. Multiple Roles, Users or Product Keys can be locked down simultaneously or excluded from lockdown. You can define in what phase or phases of the process the lockdown must occur.
- General Lockdown: Components will be locked down during a particular period of time. Multiple Roles, Users or Product Keys can be locked down simultaneously or excluded from lockdown. Additionally, lockdown can be overridden to lock or unlock a Lockdown Event.

When you access a component while it's locked down, the system displays a configurable message stating that you can't make any updates. When you click ok in the message, the component appears in read-only mode.

This example illustrates the lockdown message.



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Configuring HCM Lockdown Framework

This topic discusses how to configure the system to lock down data in components that you specify. Users can continue to access locked-down data in read-only mode, but they cannot make any updates until the lock is released.

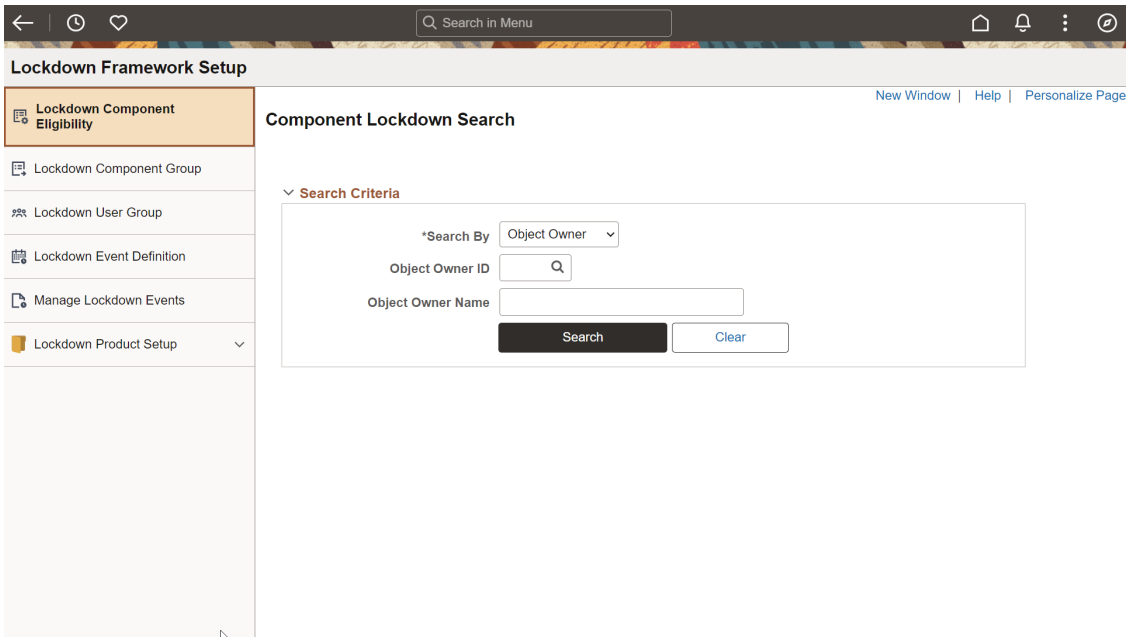
Accessing HCM Lockdown Framework Setup Using Fluid Navigation Collection

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework Setup**

You can access a collection of Lockdown Framework Setup pages from a single location in the PeopleSoft Fluid User Interface.

This example illustrates the pages that are displayed on the Lockdown Framework Setup start page.



Pages Used to Configure HCM Lockdown Framework

Page Name	Definition Name	Usage
Component Eligibility Page	HCSC_CLK_COMP_ELIG	To define which components are Eligible for a Lockdown Event.
Lockdown Component Group Page	HCSC_CLK_COMP_GRP	To group components that are eligible for lockdown.
Lockdown User Group Page	HCSC_CLK_LOCK_GRP	To set up lockdown groups that define who will be locked down.

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Page Name	Definition Name	Usage
Lockdown Event Definition Page	HCSC_CLK_EVENTDEFN	To specify when, what, why and for whom the components should be locked.
Manage Lockdown Events Page	HCSC_CLK_EVENTID_S	To view and on-demand lock or unlock an Event Definition.
Process Phase Setup Page	HCSC_CLK_PRCPHASE	To setup the different processes and phases for a product or country based on which the components are locked down.
Product Key Setup Page	HCSC_CLK_PRD_LVKEY	To define key fields (drivers) to help define groups for lockdown beyond users and roles.
Locking Overrides Page	HCSC_CLK_LCKOVRIDE	To override standard Event Mapping definitions, which occur when the Component Eligibility table is updated and saved.

Component Eligibility Page

Use the Component Eligibility page (HCSC_CLK_COMP_ELIG) to define which components are Eligible for a Lockdown Event.

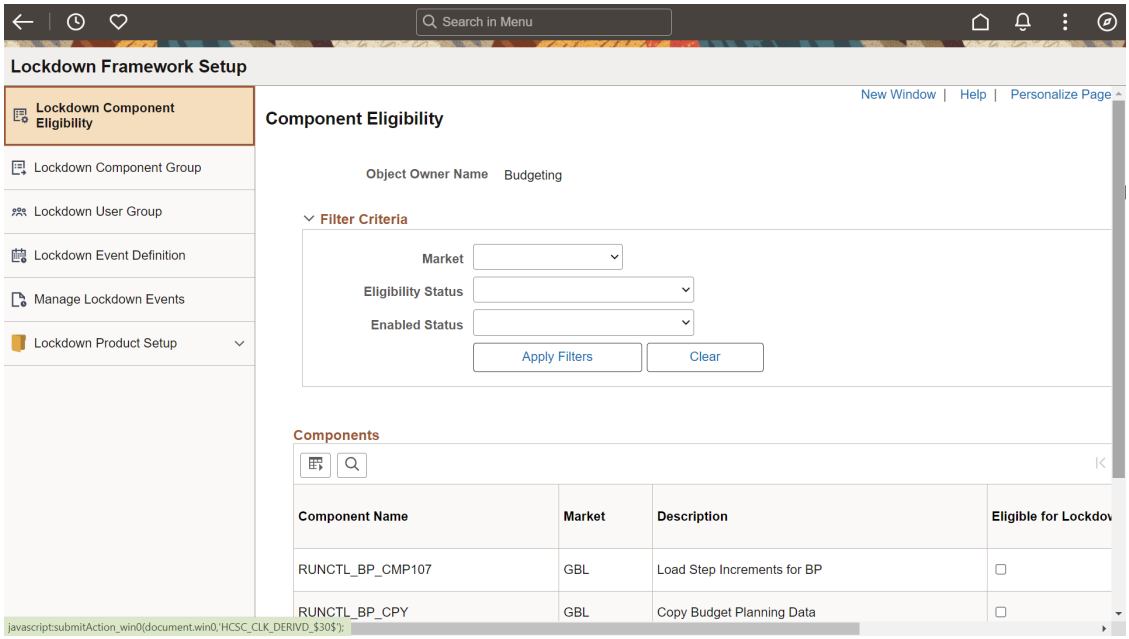
> **Note**
>
> The user can search components based on Object Owner ID or Component Name. Clicking the Component in the search result displays the Component Eligibility page listing all components for the chosen Object Owner ID with the chosen component as the first row. The searched component is displayed as the first row only if search is based on Components.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework**, and then **Lockdown Framework Setup**, and then **Lockdown Component Eligibility**

This example illustrates Component Eligibility page.

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Filter Criteria

Use the Filter Criteria section to filter the rows to make sure that all the components are set up correctly. You can refine the search based on Market, Eligibility Status and Enabled Status.

Components

The Components grid lists all the components based on selected Filter criteria.

Field or Control	Description
Component Name and **Market**	These fields uniquely identify a component.
Description	Displays the component description as defined in PeopleTools.
Eligible for Lockdown	Select this check box to indicate that the component is eligible for a lockdown. These are the only components that will be available to add to component groups. You cannot deselect this check box for a component that is already part of a component group. If you try, a message tells you which groups the component needs to be removed from. The Eligible for Lockdown field will remain ON if the Event Mapping fails when trying to disable a component.

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Field or Control	Description
Lockdown Enabled Status	Displays the component lock enabled status. Available values are: • Enabled: This status indicates that the component was marked eligible for lockdown and the event mapping was successful. • Not Enabled: This status indicates the component has not been made eligible for lockdown. • Failed: This status is displayed if the Event Mapping (or Un Mapping) fails for some reason. • New: This status is displayed when the component Eligibility page is launched for the first time for a product or if a component has been newly added to a product.

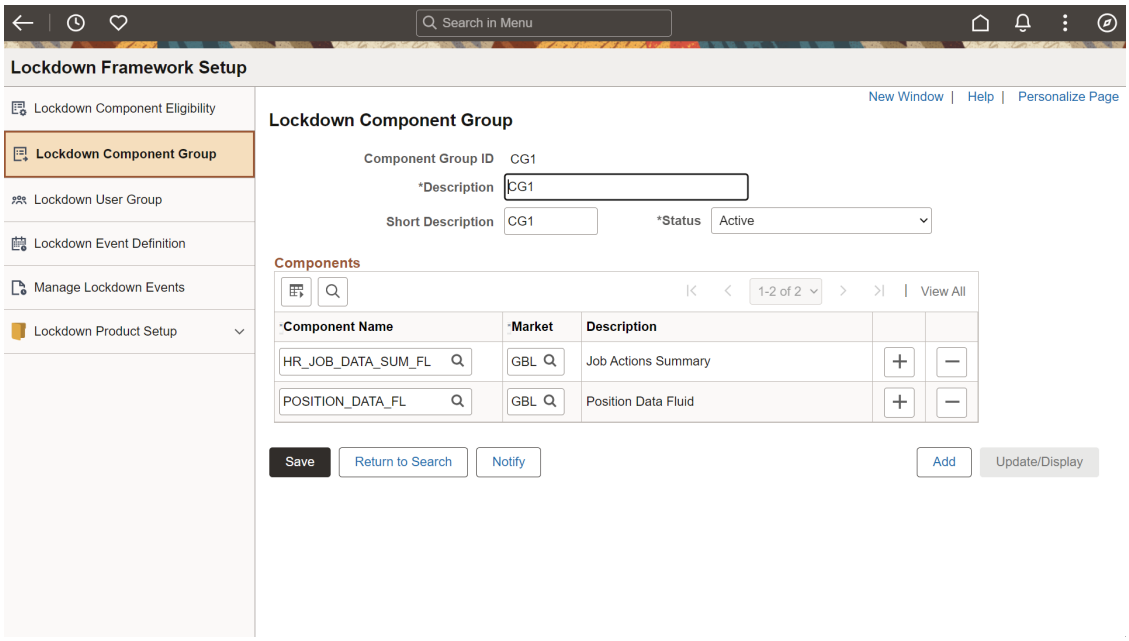
Lockdown Component Group Page

Use the Lockdown Component Group page (HCSC_CLK_COMP_GRP) to group components that are eligible for lockdown.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework**, and then **Lockdown Framework Setup**, and then **Lockdown Component Group**

This example illustrates the Lockdown Component Group page.



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Field or Control	Description
Component Group ID	Unique ID of the component group.
Description	Meaningful description of the component group description.
Short Description	Short description of the component group.
Status	Status of the component group. An inactive component group in Event definition will show a message with the Event IDs that need to be removed.
Component Name	Select a component to include in the group. The component's object name and market uniquely identify the component. You can only select the components that have the **Enabled for Lockdown** check box selected on the Component Eligibility page.
Market	Select the component market. As CAN and USA are not separate products, you can specify either CAN or USA as the market.

Components

Use the Components grid to list the components in the group.

Lockdown User Group Page

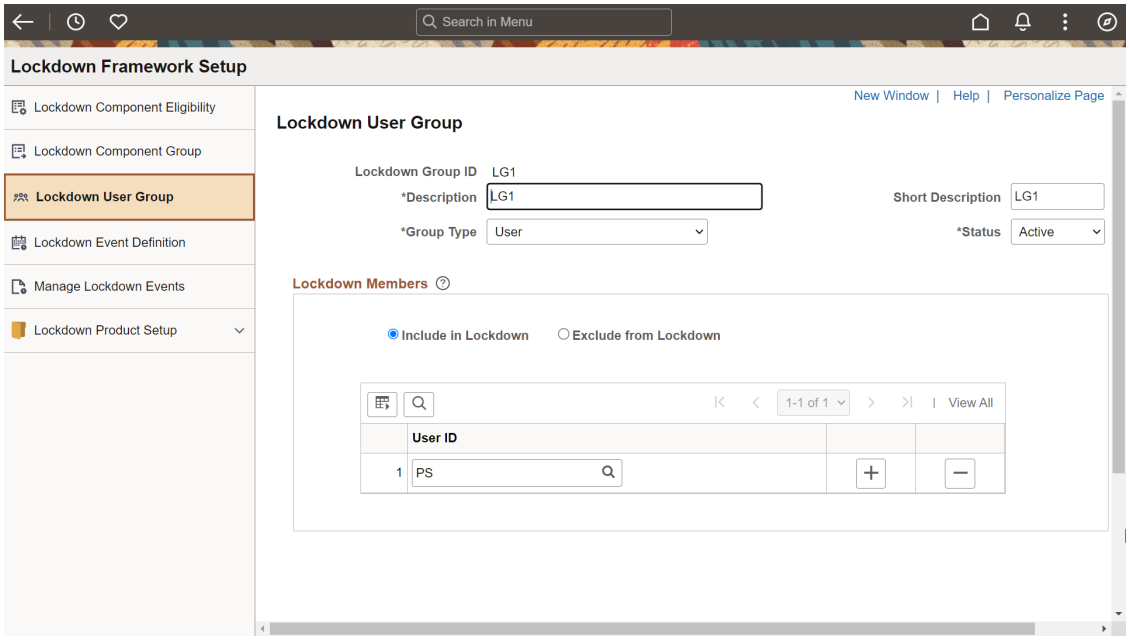
Use the Lockdown Group page (HCSC_CLK_LOCK_GRP) to set up lockdown groups. The lockdown group specifies who should be impacted by the locking. You can group users, roles, or product keys for lockdown.

Navigation:

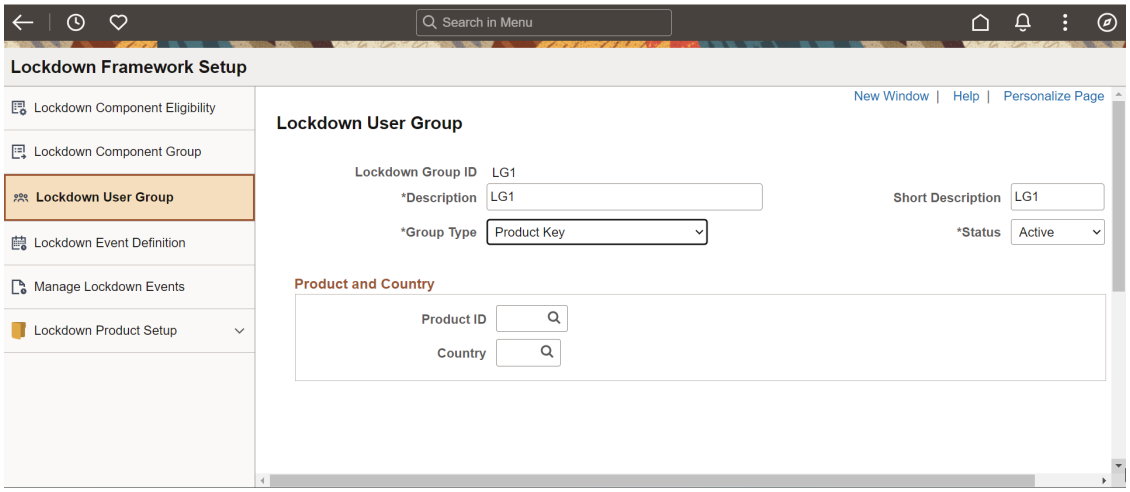
Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework**, and then **Lockdown Framework Setup**, and then **Lockdown User Group**

This example illustrates the Lockdown User Group page for User group type.

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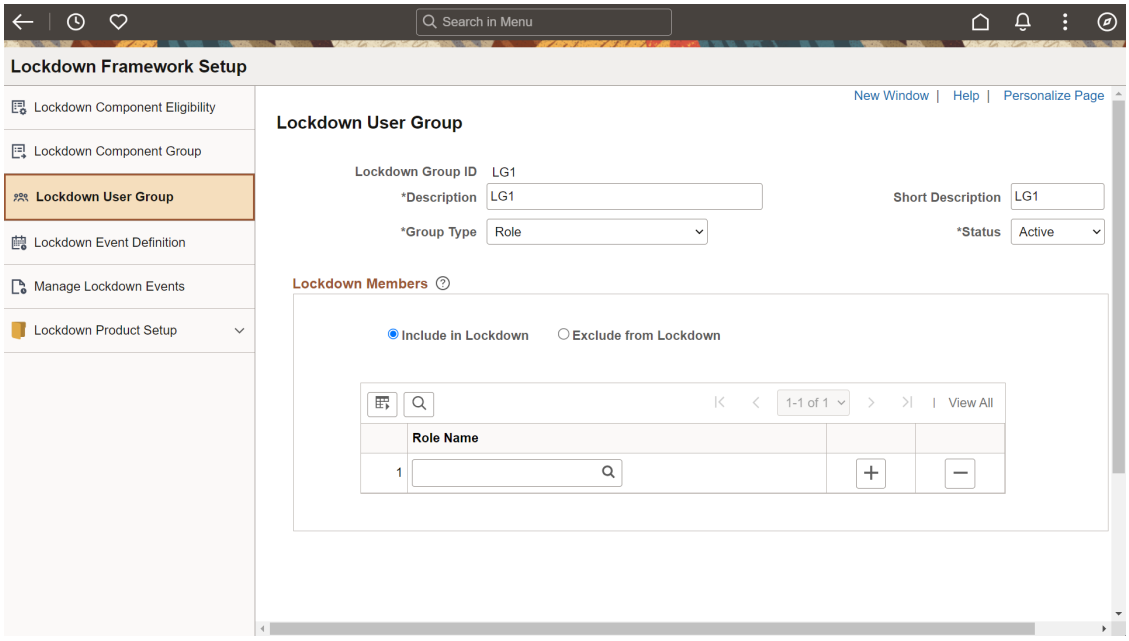


This example illustrates the Lockdown User Group page for Product Key group type.



This example illustrates the Lockdown User Group page for Role group type.

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Field or Control	Description
Lockdown Group ID	Unique ID of the lockdown group.
Description	Enter a meaningful description of the lockdown group.
Short Description	Enter a short description of the lockdown group.
Group Type	Select the required group type based on which the lockdown group is created. Available values are: • Product Key: Lockdown group is set up based on products (Global Payroll, Payroll for North America, Absence Management). • Role: Lockdown group is set up based on roles. • User: Lockdown group is set up based on users.
Status	Status of the lockdown group. Available options are: • Active • Inactive

Product and Country

The Product and Country section is displayed only when the value selected in the Group Type field is 'Product Key'.

Field or Control	Description
Product ID	Unique ID of the product.
Country	Specifies the country for which you are defining the lockdown group.

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Lockdown Members

The fields in the Lockdown Members grid vary dynamically based on the primary key field defined for a product key driver in the Product Key Setup page. For example if Product is Payroll for North America the grid will contain Company and Pay Group. If Product is GP Payroll or Absence Management the grid will contain Pay Group.

Field or Control	Description
Include in Lockdown	Select this option if you want to include the selected members in the lockdown group.
Exclude from Lockdown	Select this option if you want to exclude the selected members in the lockdown group.
Applies to ALL	Select this option if you wish to add all driver key field values under the selected product to lockdown group. When this option is selected, the lock group values are retrieved from the primary record specified in the Product Key Setup page. If this option is selected, the Lockdown Members grid is cleared and disabled. **Note:** This field is displayed only when the value selected in the Group Type field is *Product Key*.
User ID	Enter the required user you wish to add to the lockdown group. **Note:** This field is displayed only when the value selected in the Group Type field is *User*.
Role Name	Enter the required user roles you wish to add to the lockdown group. **Note:** This field is displayed only when the value selected in the Group Type field is *Role*.
Driver	This field is available only if group type is Product Key. This field is loaded with Driver values defined in the product key setup.
Primary Key <1 to n>	This field is dynamic and its label depends on the product key definition. For example, if you select the Product ID as GP or AM, this field name is displayed as Pay Group. You can enter the required pay groups you wish to add to the lockdown group. **Note:** This field is displayed only when the value selected in the Group Type field is *Product Key*.

Lockdown Event Definition Page

Use the Lockdown Event Definition page (HCSC_CLK_EVENTDEFN) to define Lockdown Event; to specify what, why, when and for whom the components should be locked.

Lockdown events can be defined in two ways:

- Process based lockdown: In Process Based Lock event, Product Process phases are added to indicate the different Phases WHEN the lockdown should occur. For example, GP

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- Identify, Calculate and Finalize Phases. When these Phases are running the component will be locked for the specified lock groups.

- General lockdown (Non Process): In General Based Lock event, a lockdown schedule is added which indicates Start and End date/Time WHEN the lockdown should occur. For example, components will be locked-down during a particular period of time for the specified lockdown group.

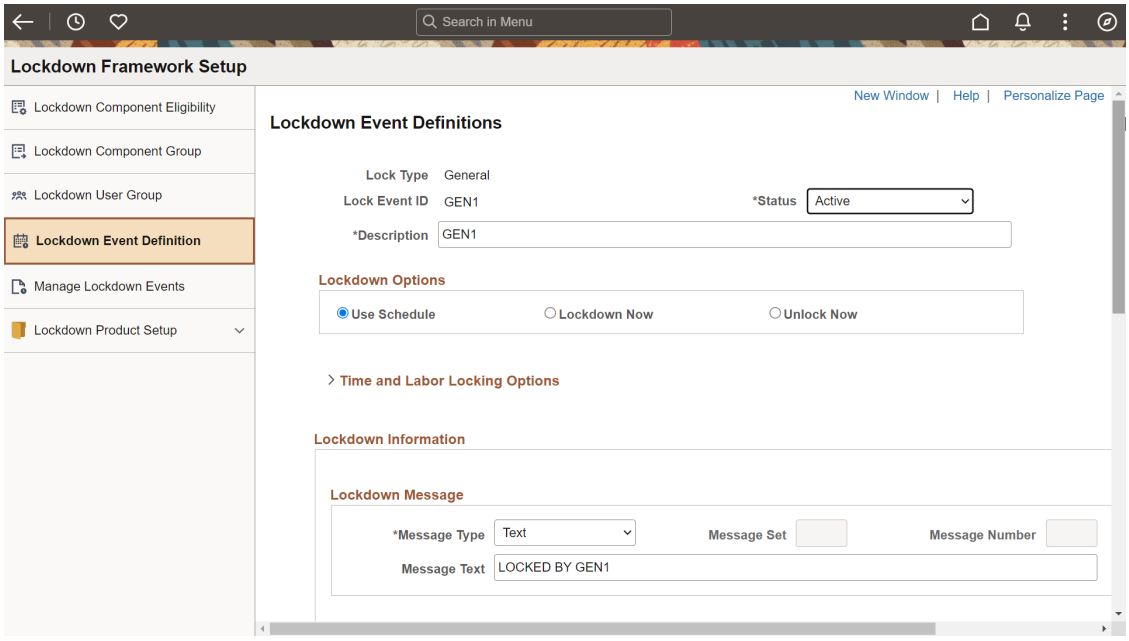
Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework**, and then **Lockdown Framework Setup**, and then **Lockdown Event Definition**

Lockdown Event Definition - General Events

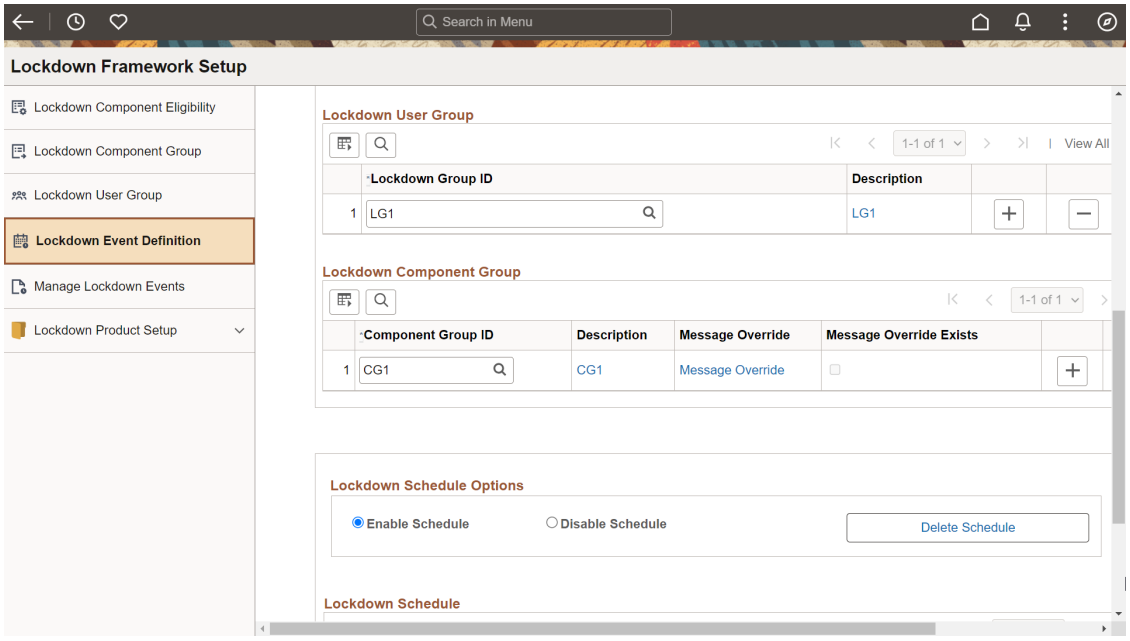
Use this page to create general lockdown event definitions.

This example illustrates the Lockdown Event Definitions page for a General based Lockdown Event (1 of 3).

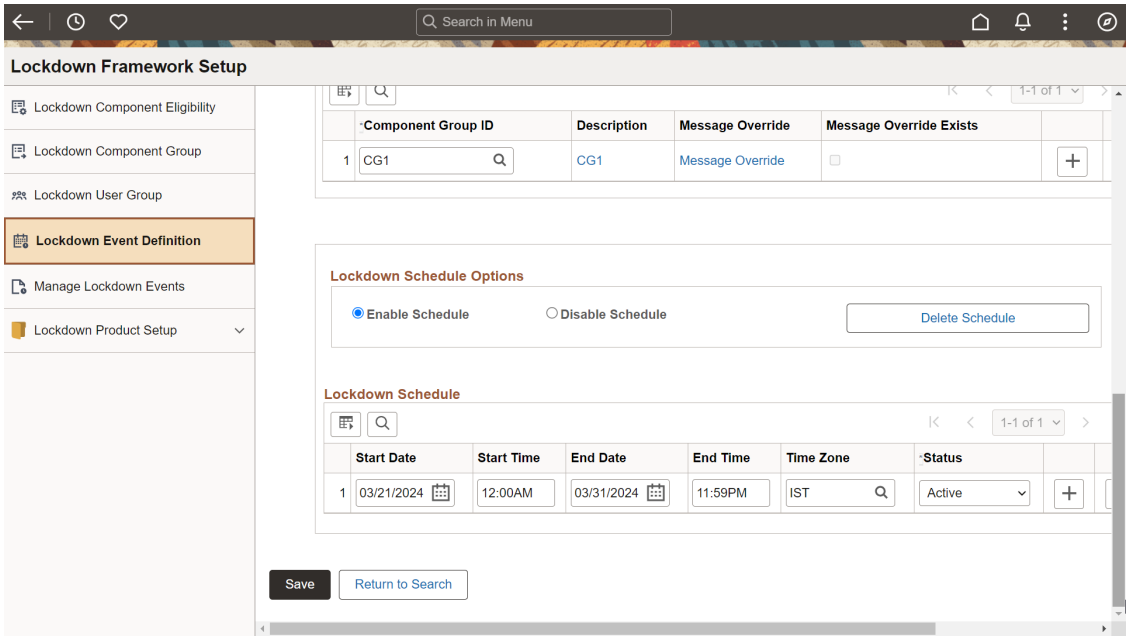


This example illustrates the Lockdown Event Definitions page for a General based Lockdown Event (2 of 3)

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This example illustrates the Lockdown Event Definitions page for a General based Lockdown Event (3 of 3).



Field or Control	Description
Lock Type	Type of lockdown event. That is, whether the events are generated based on Process based lockdown or General lockdown.
Lock Event ID	Unique ID of the lockdown event definition.
Status	Status of the lockdown event definition.
Description	Meaningful description of the event definition.

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Lockdown Options

Use the Lockdown Options section to lock or unlock an event.

Field or Control	Description
Use Schedule	This is the default value and simply indicates that the lockdown event is using the schedule that is entered. This option only applies when Lock Type is *General*.
Lockdown Now	Select this radio button to immediately lock down the system, regardless of whether a process is running or regardless of the schedule for general lockdown. If Lockdown Now option is selected: • For General Lockdown: User is allowed to edit the Lockdown Message, Lockdown User Group, and Lockdown Component Group sections. The Lockdown Schedule Options and Lockdown Schedule Grids are display only as the Lockdown Now functionality ignores the Lockdown schedule information. • For Process Lockdown: User is allowed to edit the Lockdown Message, Lockdown User Group, and Lockdown Component Group sections. The Process Phase grid is display only. **Note:** *Lockdown Now* solely applies to the components and users specified in the event definition.
Unlock Now	Select this radio button to stop any active lockdowns. This option is mainly used: • If a process based event is running, and got aborted. • If the process based event is running and you want to unlock the system for any reason. **Note:** The Unlock Now option takes precedence over the Lockdown Now option. **Note:** *Unlockdown Now* solely applies to the components and users specified in the event definition.

Time and Labor Locking Options

Use the Time and Labor Locking Options to lockdown a prior period or both the prior and current period time reporting components.

Lockdown Message

In the Lockdown Message grid, you can specify what the online message will be when a user attempts to access a locked component. Messages can be defined in two ways:

- The default message can be used by all defined Component Groups.
- On the Component Group section, you can override this default message.

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Field or Control	Description
Message Type	Select the required message type. Available options are: • Message Catalog: If Message Catalog is selected, you must enter values in Message Set and Message Number fields. • Text: If Text is selected, you must enter value in Message Text field. Translations are not supported for this message type.
Message Set	Select the required message set number.
Message Number	Select the required message number.
Message Text	Enter the message text.

Lockdown User Group

The Lockdown User Group grid is used to define who gets locked out.

Field or Control	Description
Lockdown Group ID	Select the lockdown group ID which you want to map to the event definition. Only Active Lockdown Groups can be selected.
Description	Description of the lockdown group. Click the hyperlink to access the Lockdown Group page corresponding to the selected lockdown group ID.

Lockdown Component Group

The Lockdown Component Group grid is used to select the component group IDs you want to map to the event definition. A Component Group Id determines which components are locked out.

Field or Control	Description
Component Group ID	Select the required component group ID you want to map to the event definition. Only active components can be selected.
Description	Description of the component group. Click the hyperlink to access the Lockdown Component Group page corresponding to the selected component group ID.
Message Override	This option allows the user to define a unique message for a specific Component Group, instead of the default message. Click the Message Override link to define the message.
Message Override Exists	The message override checkbox indicates whether the user has defined a message override for a specific component group.

Lockdown Schedule Options

Use the Lockdown Schedule Options grid to enable, disable or delete the lockdown schedules.

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Field or Control	Description
Enable Schedule	Select this radio button to enable the schedule, which means the schedule is active.
Disable Schedule	Select this radio button to temporarily disable the lockdown schedule. By selecting this radio button, the Lockdown Schedule grid is disabled.
Delete Schedule	Select this button to delete the current and future dated schedule rows.

Lockdown Schedule

Use the Lockdown Schedule grid to create lockdown schedules.

Field or Control	Description
Start Date	Schedule start date.
Start Time	Schedule start time.
End Date	Schedule end date.
End Time	Schedule end time.
Time Zone	Select the required time zone. This start and end times are determined by the time zone you have selected. Users' access times are determined by their timezone preferences.
Status	Status of the schedule. Available options are: • Active: Select this option to enable the schedule. • Inactive: Select this option to temporarily disable the schedule.

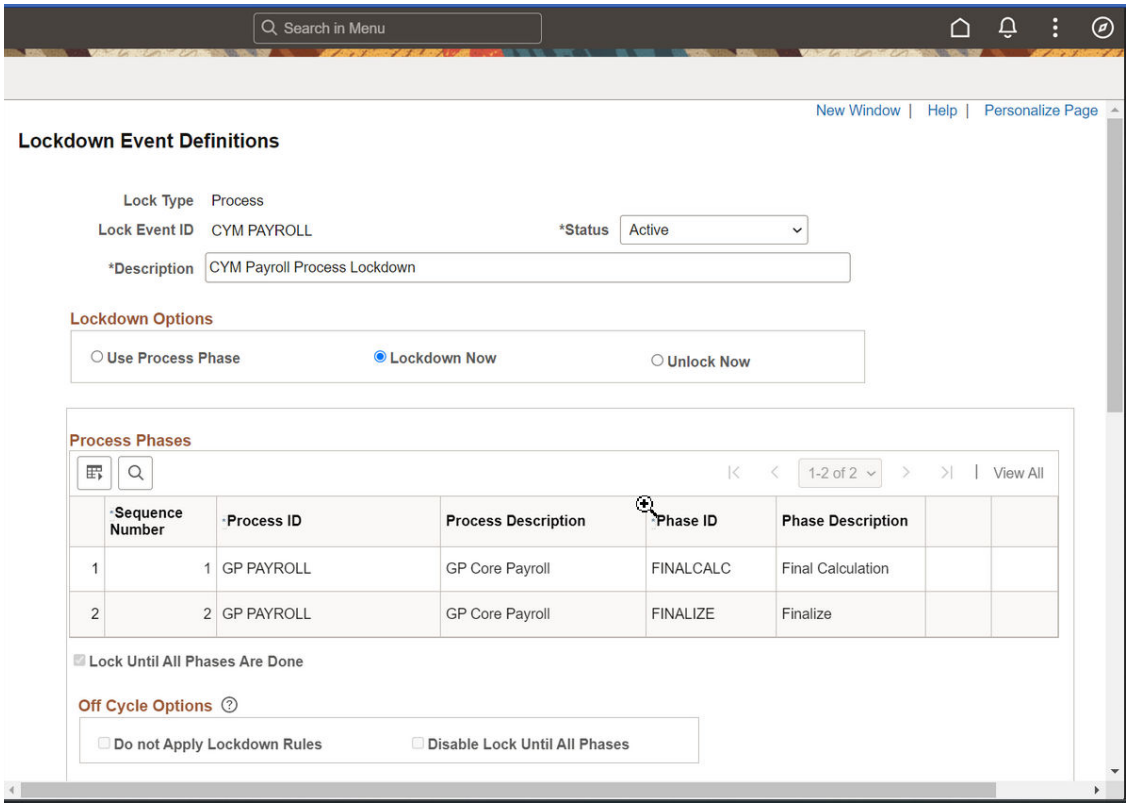
> **Note**
>
> The components are not locked if the user does not enter any Lockdown Schedule information or Lockdown Schedule is disabled.

Lockdown Event Definition - Process based Events

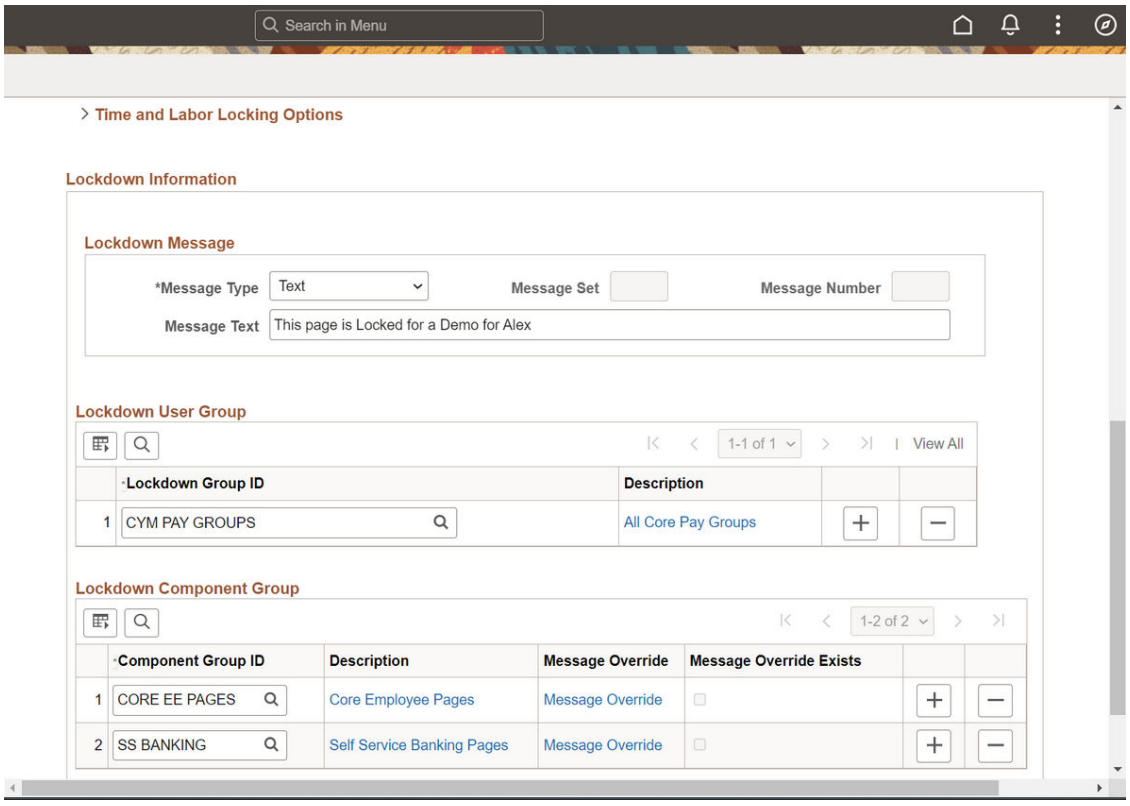
Use this page to create process based lockdown events.

This example illustrates the Lockdown Event Definitions page (1 of 2) with lockdown type as Process.

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This example illustrates the Lockdown Event Definitions page (2 of 2) with lockdown type as Process.



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Lockdown Options

Field or Control	Description
Use Process Phase	Select the Use Process Phase radio button to create rules based on a Process Phase (such as Calculation and Confirm).
Lockdown Now	Select this value if you want to immediately lockdown the system.
Unlock Now	Select this value to stop any lockdown that is currently in effect. This is typically used when an abort occurs during a Process Based Event. If you have a process-based event in place and simply do not want to lockdown the system, you can select this option.

Process Phases

The Process Phases grid allows you to indicate the process/phase(s) that are included in the lockdown, per Sequence Number.

> **Note**
>
> The Process Phase grid is displayed only for Process based Events.

Field or Control	Description
Sequence Number	Enter the sequence number of the process/phase.
Process ID	Select the unique id of the process/phase setup component. If the Phases from different process IDs are added, a warning message is displayed, to make sure that the keys of all processes are same.
Process Description	Displays description of the selected process.
Phase ID	Select the required phase ID.
Phase Description	Displays description of the selected phase.
Lock until all Phases are Complete	Select this checkbox if you want to lock down the system between phases, such as between Final Calculation and Confirm/Finalize, or from Finalize to Banking. The system will stay locked until all the phases are complete.

Off Cycle Options

The Off Cycle options are displayed only when Enable Off Cycle Lockdown Option field is checked in the Process Phase Setup page.

Field or Control	Description
Do Not Apply Lockdown Rules	Select this checkbox to indicate if the system should ignore lockdown rules, for an off cycle run.

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Field or Control	Description
Disable Lock Until All Phases	Select this checkbox to indicate if the system should ignore Locking Until All Phases, for an off cycle run. This option is available only when Lock until allPhases are Complete check box is selected .It is not possible to select the Disable Lock until All Phases option if the Do not Apply Lockdown Rules option is selected.

For details on the rest of the grids available in the Lockdown Event Definition page, see the Lockdown Event Definition page for General Process.

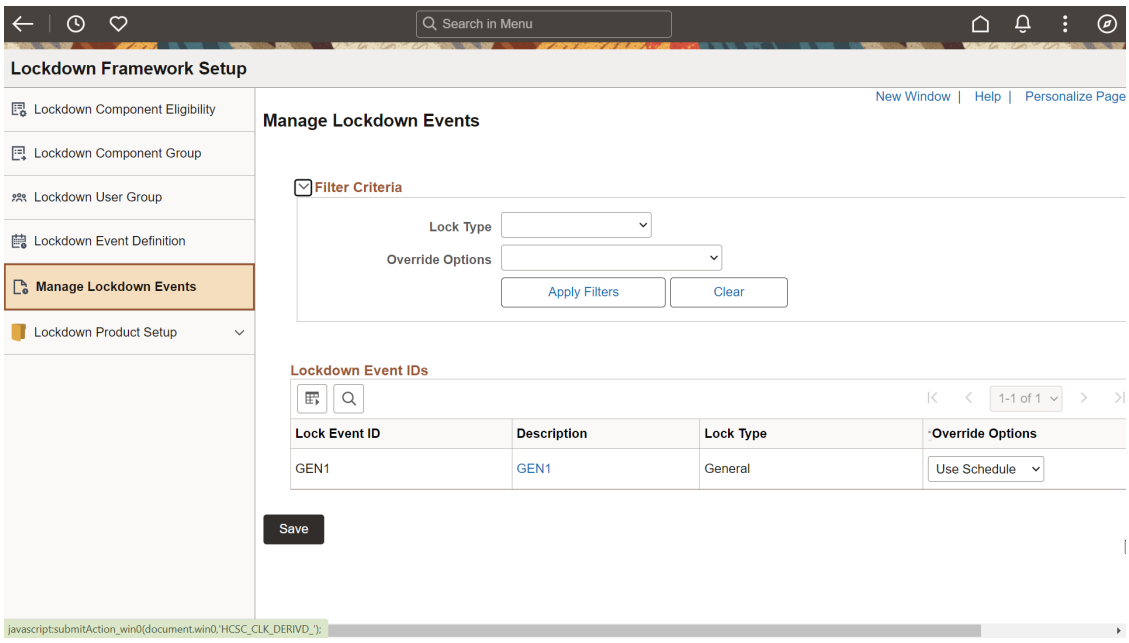
Manage Lockdown Events Page

Use the Manage Lockdown Events page (HCSC_CLK_EVENTID_S) to to lock or un-lock event definitions on-demand. You can also view/update the Lockdown Event Definition.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework**, and then **Lockdown Framework Setup**, and then **Manage Lockdown Events**

This example illustrates the Manage Lockdown Events page.



Use the Filter Criteria section, to filter the lockdown events based on Lock Type and Override Options.

Field or Control	Description
Lock Event ID	Displays unique ID of the active lockdown events.

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Field or Control	Description
Description	Description of the lockdown event definition. Click this link to access the Lockdown Event Definition page, where you can edit the required details.
Lock Type	Displays the lockdown type of the the event.
Override Options	Select the required value from the drop-down list. You can override the lockdown options corresponding to the selected lockdown event without accessing the Lockdown Event Definition page. Values in the list are: • Lockdown Now: You can select this value if you want to immediately lockdown the system. • Unlock Now: You can stop any lockdown that is currently in effect by selecting this value. This is typically used when an abort occurs during a Process Based Event. If you have a process-based event in place and simply do not want to lockdown the system, you can select this option. • Use Schedule: Indicates that the events are locked down based on schedules. This value is displayed for general based lockdown event. • Use Process Phase: Indicates that the events are locked down based on process phases. This value is displayed for process based lockdown events.

Process Phase Setup Page

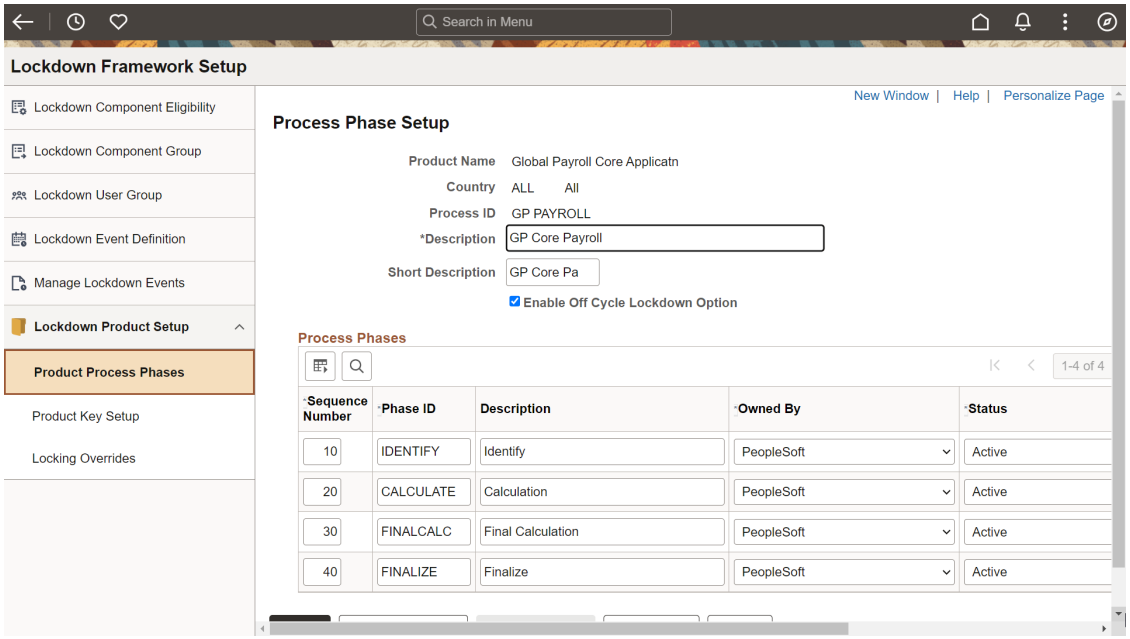
Use the Process Phase Setup page (HCSC_CLK_PRCPHASE) to setup the different processes and phases for a product or country based on which the components are locked down. The lockdown components use this setup to capture phases; which will then appear in event definitions.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework Setup**, and then **Lockdown Product Setup**, and then **Product Process Phases**

This example illustrates the fields and controls on the Process Phase Setup page.

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Field or Control	Description
Product Name	Displays the name of the product.
Country	Displays the country name.
Process ID	Displays the unique ID of the process that triggers the lockdown. Delivered processes are: GP PAYROLL: for the GP Payroll process; ABSENCE. For the Absence Management process; PNA PAYROLL: For the PNA Payroll process. A technical brief with detailed instructions on how to add your own processes is posted to My Oracle Support. To access this technical brief, search for Doc ID 2963239.1.
Description	Enter a meaningful description of the process.
Enable Off Cycle Lockdown Option	This field determines whether off cycle options appear on a Process Based Lockdown Event.
Sequence Number	Displays sequence number of the product phase.
Phase ID	Unique identifier for each phase of the selected product.
Description	Enter a meaningful description of each phase.
Owned By	Select whether the phase is owned by PeopleSoft or Customer. If the customer adds any new phase, then the value of the Owned By field will be set to **Customer**. In the Customer environment, this field is set to display only. Users cannot modify or delete PeopleSoft owned phases.

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Field or Control	Description
Status	Select the required status to be assigned to each phase. Available options are **Active** and **Inactive**. If a phase is marked as inactive; it cannot be selected when creating a Process Based Event Definition.

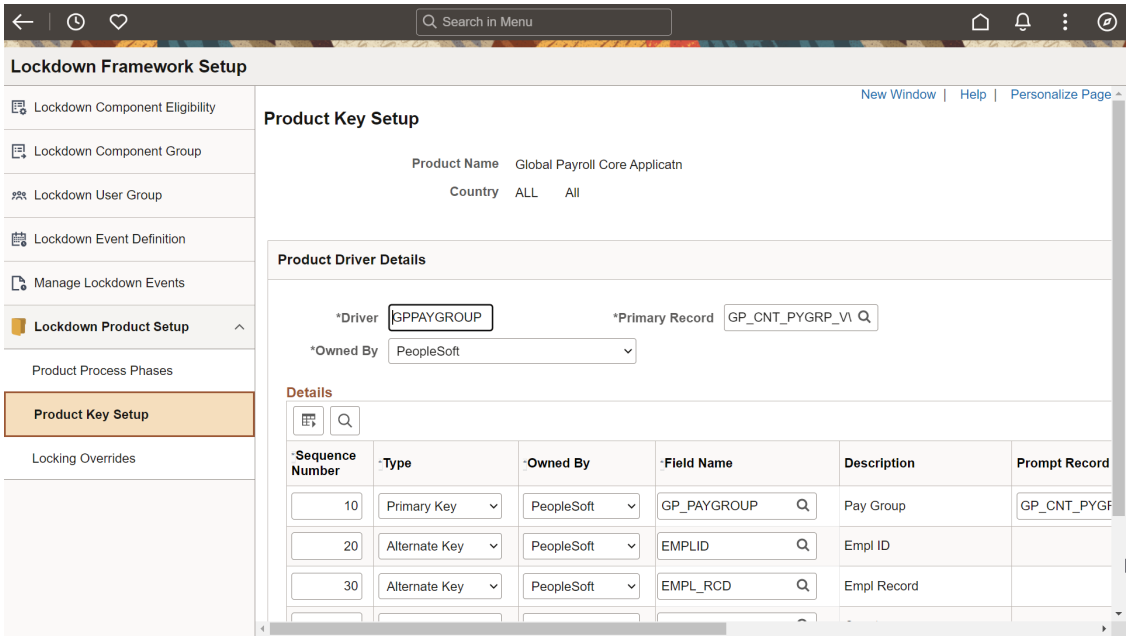
Product Key Setup Page

Use the Product Key Setup page (HCSC_CLK_PRD_LVKEY) to define key fields (drivers) to help define groups for lockdown beyond users and roles. This table is delivered by PeopleSoft based on the unique driver(s) for each Process supported by PeopleSoft.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework Setup**, and then **Lockdown Product Setup**, and then **Product Key Setup**

This example illustrates the Product Key Setup page.



Field or Control	Description
Driver	Enter the primary key field which drives your product.
Primary Record	Select the Primary key record; that returns all the primary key values for the product and country. **Note:** Primary key values are retrieved from this record with the option 'Applies to All' in the lockdown group.

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Field or Control	Description
Owned By	This field is displayed as PeopleSoft for PeopleSoft delivered keys. If the database is owned by the customer, this field displays the value Customer for newly added keys.
Sequence Number	Sequence number of the primary key field applicable for the key value.
Type	Select the type of the key field. Values in the list are: • Primary Key: Primary keys are the fields that drive the entire lockdown process for a product/country. The primary keys defined here will be used in the Lockdown Group Definition. • Alternate Key: Alternate keys are fields that are not primary and could be used as search keys for many components.
Owned By	This field is displayed as PeopleSoft for PeopleSoft delivered keys. If the database is owned by the customer, this field displays the value Customer for newly added keys.
Field Name	Select the key field name.
Description	Description of the selected field.
Prompt Record	Prompt record for the primary keys. Prompt records should contain the corresponding primary key field.
SQL Object Identifier	Unique ID of the SQL object. For Alternate key fields, it is mandatory for the user to enter the SQL Id. This SQL Id will be used to derive the Primary driver key values for the chosen alternate key value.
View SQL	Click View SQL link to access the View SQL Definition modal window, where you can the SQL statement text. This link is displayed if a SQL Id is entered by the user.

Locking Overrides Page

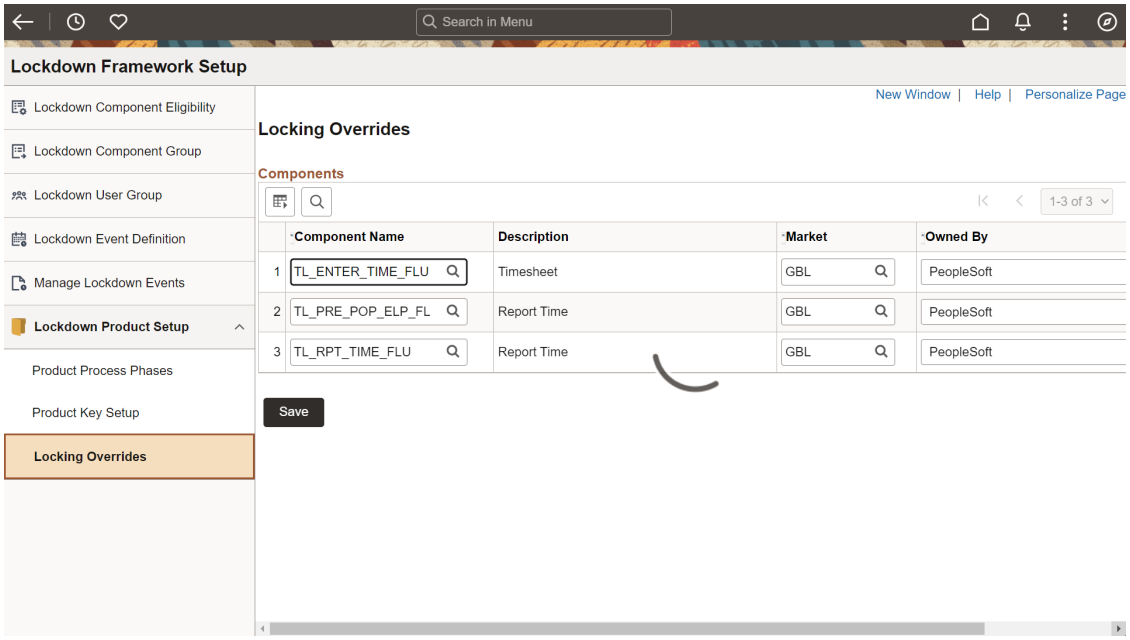
Use the Locking Overrides page (HCSC_CLK_LCKOVRIDE) to override standard Event Mapping definitions, which occur when the Component Eligibility table is updated and saved.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Lockdown Framework Setup**, and then **Lockdown Product Setup**, and then **Locking Overrides**

This example illustrates the Locking Overrides page.

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Field or Control	Description
Component Name	Select a component for which default event mapping needs to be skipped.
Market	Select component market for which default event mapping needs to be skipped.
Owned By	Select the required value from the Owned By field. Available options are: • PeopleSoft • Customer

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25

Setting Up and Working with Group Definitions

Understanding Group Build

These topics discuss how to:

- Use the group build feature.
- Create a group.

Using the Group Build Feature

The Group Build feature provides a standard way to create groups of people in HCM. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 though 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Base Compensation and Budgets module. You define the group only once.

You can define groups in Group Build and use those groups in HCM applications such as:

- PeopleSoft Time and Labor
- PeopleSoft Benefits Administration
- PeopleSoft Stock Administration
- ePerformance
- The following PeopleSoft Human Resources business processes:
  - Manage Base Compensation and Budgeting
  - Manage Total Rewards
  - Manage Variable Compensation
  - Manage Labor Administration

Creating a Group

Creating a group in PeopleSoft HCM involves three steps:

1. Define the population that belongs to the group.
2. Set up group security.
3. Refine dates and other application-specific parameters in individual PeopleSoft applications (if necessary).

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> **Note**
>
> These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft HCM.

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.

Groups for Manage Variable Compensation

To use an existing review group later in the Manage Variable Compensation business process, link the existing group ID to a node in the Variable Compensation Group Tree in the Manage Variable Compensation business process.

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID *NOGROUP* is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID of *NOGROUP* in the Group Build application.

Setting Up Group Definitions

To set up group definitions, use the Group Build Records and Fields component (GB_REC_FIELD), Group Build Criteria component (GB_CRITERIA_TABLE), Group Build Definition component (GB_GRP_DEFN_TABLE), and Company/Department Group Build component (RUNCTL_GBP003).

These topics provide overviews of group definitions, query definition, and automatic generation of department groups and discuss setting up group definitions.

Pages Used to Define Groups

Page Name	Definition Name	Usage
Group Build Records and Fields Page	GB_REC_FIELD	Select fields for use on the Group Build Criteria page and Group Definition page.
Group Build Criteria Page	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 Definition Comments Sec Page	GB_GRP_CRIT1_SEC	Enter free-form comments about a Group Build Criteria definition.
Group Profile Page	GB_GRP_DEF1_TBL	Create a group profile. (Optional) Attach an existing group criteria ID or query to a group definition.
Group Definition Page	GB_GRP_DEF2_TBL	Specify the records, fields, and field values to define a group or refine a group criteria.

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Page Name	Definition Name	Usage
Group Build Definition View Page	GB_GRP_DEF1_SEC	View the records, fields, field values, and operators that you've specified for the group definition.
Group Build Exceptions Page	GB_GRP_OVRRIDE_SEC	Identify exceptions, such as additional employee jobs to include or exclude from a group.
Group Result Page	GB_GROUP_RES_SEC	View and sort the members of the groups that you've built on the Group Build pages.
Company/Department Group Build Page (group build from company and department)	RUNCTL_GBP003	Create groups from departments by running the Group Build Construction SQR process (GBP003) to translate your existing company and department structure into group format.

Understanding Group Definitions

To define a group's population:

1. (Required unless using a query.) On the Group Build Records and Fields Page (GB_REC_FIELD), select the fields for each record available to make them available to create group criteria on the Group Build Criteria page (GB_GRP_CRIT1_TBL) and Group Definition page (GB_GRP_DEF2_TBL).
2. (Optional) Create a group criteria on the Group Build Criteria Page.

   Group criteria are like building blocks of records and fields that you can use repeatedly to create different groups. For example, if your organization operates several business processes based on workers' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

Record Name	Field Name
Job	Department
Job	Union Code

3. (Optional) Attach a group criteria ID or query to the group definition on the Group Profile Page (GB_BRP_DEFN1_TBL).

   On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.

   - Using a group criteria ID.

     If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can use only one group criteria per group.

   - Using PeopleSoft Query.

     If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the thirty-two records that are available through the Group Build Criteria page or Group Definition

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page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.

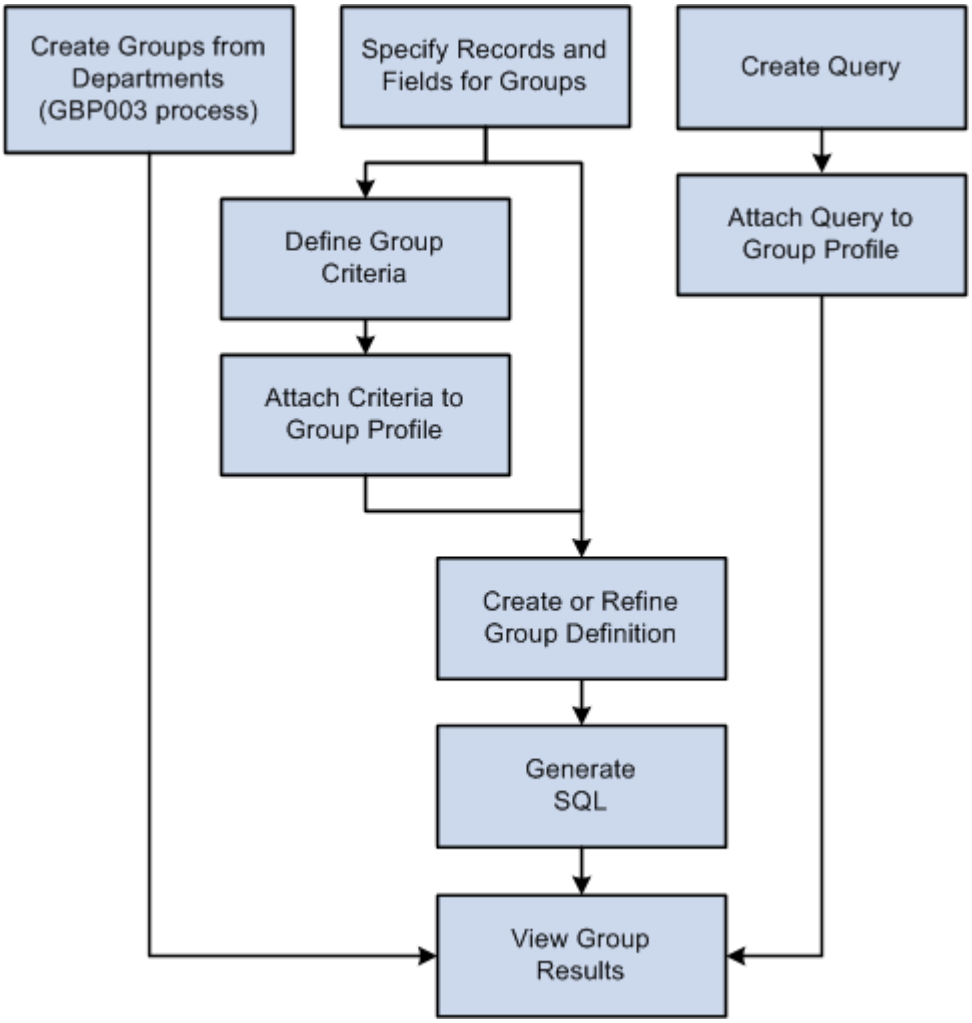
See Understanding Query Definition for Group Build.

4. Define or refine the group by selecting records, fields, and field values on the Group Definition Page.
   - If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Build Criteria. You can also add any other records, fields, and values that you want to include in the group's definition.
   - If you've included a query in the group definition, you can't make any further selections on the Group Definition page.
   - You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

   See Setting Up Group Security.
5. (Optional) Identify employee exceptions to your group on the Group Build Exceptions Page (GB_GRP_OVRRIDE_SEC) using the Group Definition page. You can identify those employee jobs you would like to include or exclude from a group. You can also include job history, if any, for those employees on your inclusion list.

This graphic shows how to define and create groups, as discussed above, as well as the create groups from departments and query methods for creating groups:

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Understanding Query Definition for Group Build

Use PeopleSoft Query with Group Build to define a group to access many more tables than the thirty-two tables that are available on the Group Build Criteria page or the Group Definition page.

When you define a query to use in group definitions, the following rules apply:

- The first record you insert into the query must be the Group Build view (GB_QRY_LINK_VW).

  The system uses this view to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.
- You must select the following four fields from the GB_QRY_LINK_VW record:
  - EFFDT
  - EEFFSEQ
  - EMPLID
  - EMPL_RCD
- You must have at least one criterion for a record that you add in PeopleSoft Query.

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You should not add additional criterion from the GB_QRY_LINK_VW record in PeopleSoft Query.

- You can't define fields that are returned by the SQL statement.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You can't use a prompt as an expression.

  You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).
- You can't use an expression in the left criteria of the query.
- The maximum length of the expression is 254 characters.

See *PeopleTools: PeopleSoft Query*.

Understanding Automatic Generation of Groups by Department

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides the Group Build Construction SQR process (GBP003) for translating your departmental structure into group format. With this process, you create new groups that correspond to your existing company, setID, and department structure.

For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new *Group USA 10200.*

Group Build Records and Fields Page

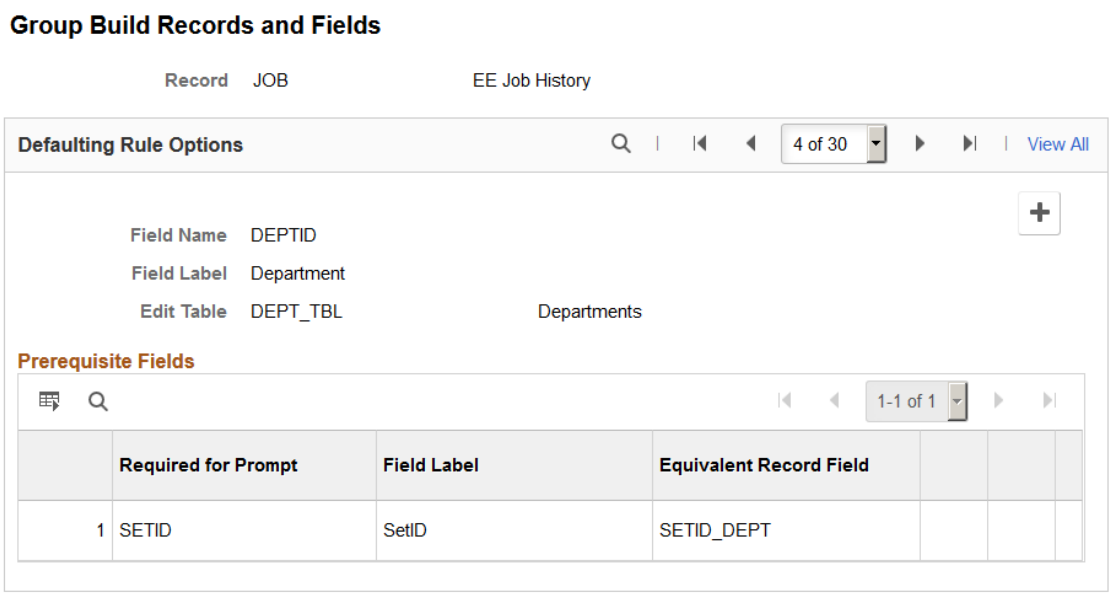
Use the Group Build Records and Fields page (GB_REC_FIELD) to select fields for use on the Group Build Criteria page and Group Definition page.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Group Build Records and Fields**, and then **Group Build Records and Fields**

This example illustrates the fields and controls on the Group Build Records and Fields page. You can find definitions for the fields and controls later on this page.

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For the record you selected on the search page, choose the fields you want to make available for creating group criteria on the Group Build Criteria page and on the Group Definition page. The system makes only those fields that you select here available on the Group Build Criteria page.

Defaulting Rule Options

Field or Control	Description
Field Name and **Field Label**	Select the field name that you want to have available for use as group criteria. After you select a field name, its description appears in Field Label; you can change this description.
Edit Table	Select the field's edit table—the table from which the field is prompted.

Prerequisite Fields

Field or Control	Description
Required for Prompt and **Field Label**	Select the field that prompts for the group criteria fields, if required. For example, if the defaulting rules field is Department, select SETID because before you can select a department, you need to select the department's setID. The appropriate Field Label and Equivalent Record Field appear when you select the Required for Prompt field.
Equivalent Record Field	Select the Required for Prompt field's equivalent. For example, the department's equivalent of SETID is SETID_DEPT Sometimes the equivalent field is the same as the Required for Prompt field or there is no equivalent field. If there is no equivalent field, leave this field blank.

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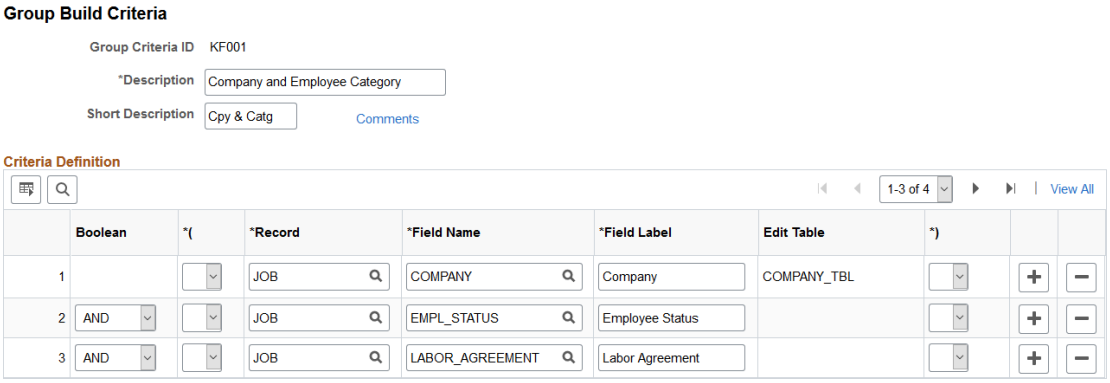
Group Build Criteria Page

Use the Group Build Criteria page (GB_GRP_CRIT1_TBL) to create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Group Build**, and then **Group Build Criteria**, and then **Group Build Criteria**
- From the Workforce Administrator Homepage in fluid, click the PeopleSoft Human Resources Administer Workforce: Manage Business Partners Tile, then select **Group Build**, and then **Group Build Criteria**.

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



Field or Control	Description
Boolean	This field appears only if you add a second row of data to the page. Use it to tell the system how to process the records and fields that you enter on this page. Values are *AND* (the default) and *OR*.
(	Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is *none*.
Record	Select the record name to include in the group criteria definition. The system displays a list of the records you made available on the Group Build Records and Fields component.
Field Name	Enter the field name to include in the group criteria definition. The system displays a list of the fields you made available on the Group Build Records and Fields component for the record that you selected in the **Record** field.

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Field or Control	Description
Field Label	The system fills in this field when you press TAB to move out of **Field Name.** You can change the entry.
Edit Table	The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of **Field Name.**
)	Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Group Profile Page

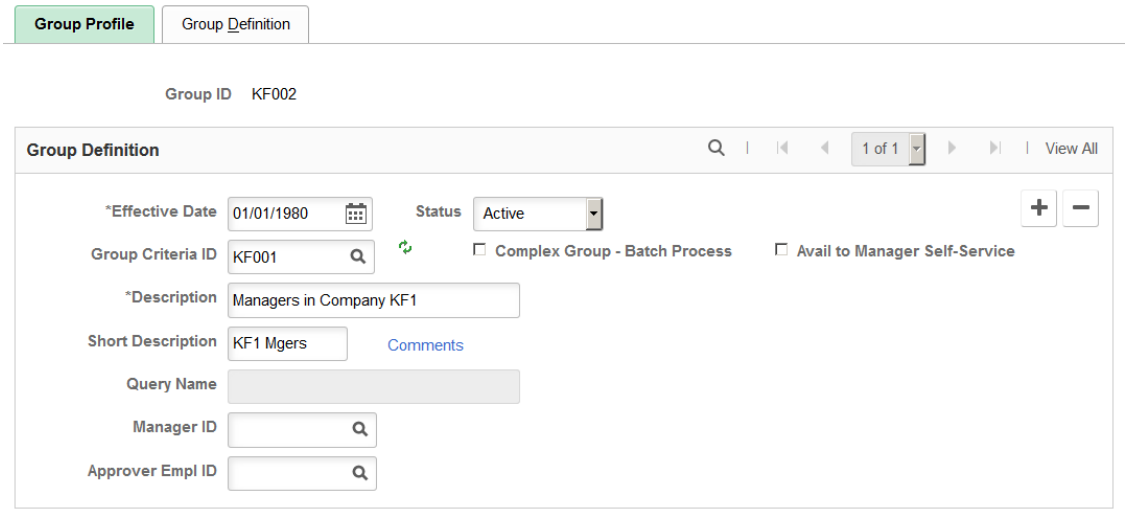
Use the Group Profile page (GB_GRP_DEF1_TBL) to create a group profile.

(Optional) Attach an existing group criteria ID or query to a group definition.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Group Build**, and then **Group Build Definition**, and then **Group Profile**
- From the Workforce Administrator Homepage in fluid, click the PeopleSoft Human Resources Administer Workforce: Manage Business Partners Tile, then select **Group Build**, and then **Group Build Definition**, and then **Group Profile**.

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



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Field or Control	Description
Group ID	Enter or select the group ID on the search page. **Note:** The group ID *NOGROUP* is used for Variable Compensation plans without groups. It is a reserved group ID; you cannot create a Group ID of *NOGROUP* in the Group Build application.
Group Criteria ID	To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.
	If you changed the Group Criteria ID, click the **Refresh** button to repopulate the Group Definition page with new values.
Complex Group - Batch Process	Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes. PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page. **Note:** Clicking the **Launch Count** button on the Group definition page sends the group to the process scheduler to be generated. If you have a complex group that you have already generated, clicking Launch Count retrieves the number of rows in the group.
Avail to Manager Self-Service	Select this check box if you plan to use Group ID as an access type for any manager self-service transaction.
Comments	Click this link to enter free-form comments on the Group Build Definition View page and to view the where clauses defined on the Group Definition page.
Query Name	To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank. **Note:** When you access the list of options in this field, all existing queries that include the record GB_QRY_LINK_VW appear. However, the Group Build process works only with queries that have the fields EMPLID, EMPL_RCD, EFFDT, and EFFSEQ. If you select a query that does not contain those fields, the system will not display the Launch Count and Group Visualize buttons on the Group Definition page. See Understanding Query Definition for Group Build.

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Field or Control	Description
Manager ID	Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200, enter the department manager's ID here. You can also use this field to designate the leader of a project team. Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups. If you selected the Avail to Manager Self-Service check box, Manager ID is required.
Approver Empl ID (approver employee ID)	If you're planning to use this group in the Variable Compensation Administration by Groups business process, enter the employee ID of the person who approves awards for this group. The system displays a list of values. If you selected the Avail to Manager Self-Service check box and are using workflow with self-service transactions, Approver EmplID is required.

See *PeopleTools: PeopleSoft Query.*.

Group Definition Page

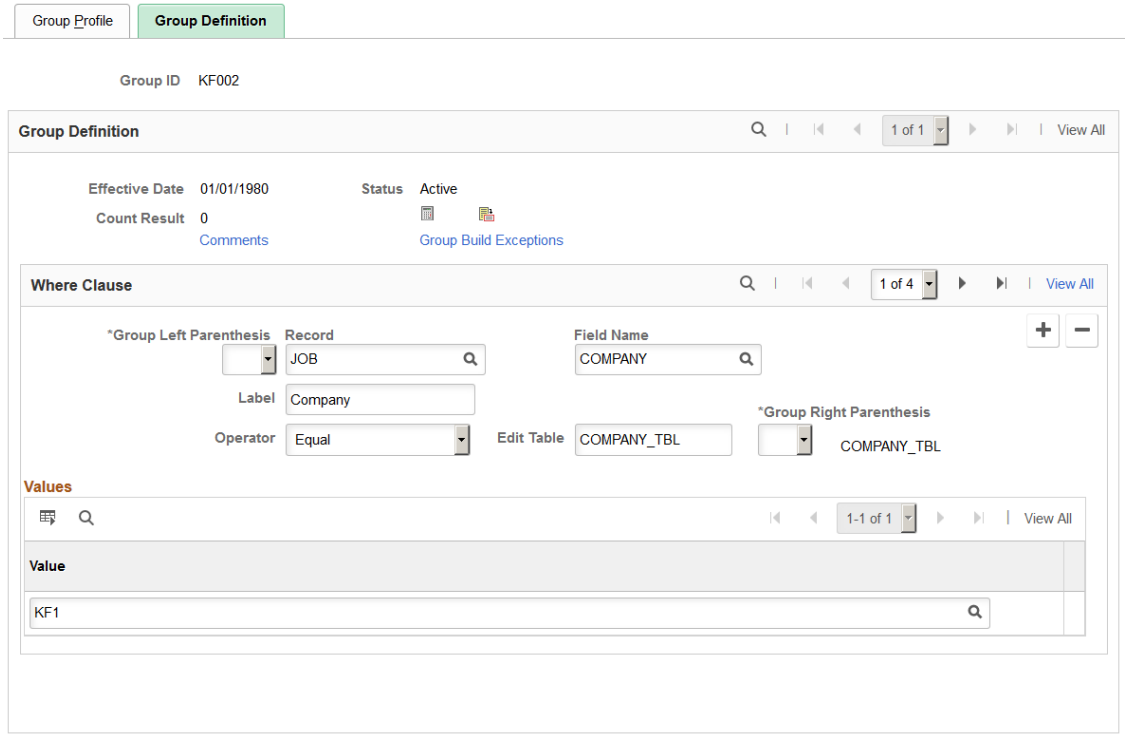
Use the Group Definition page (GB_GRP_DEF2_TBL) to specify the records, fields, and field values to define a group or refine a group criteria.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Group Build**, and then **Group Build Definition**, and then **Group Definition**
- From the Workforce Administrator Homepage in fluid, click the PeopleSoft Human Resources Administer Workforce: Manage Business Partners Tile, then select **Group Build**, and then **Group Build Definition**, and then **Group Definition**.

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

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Group Definition

You can use this page in combination with a group criteria entered on the Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

  The system populates the Group Definition page with the record and field names from the Group Build Criteria page. You can't change the record and field names on this page. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Build Criteria page. You can add more records, field names, and field values to the definition.

- If you aren't using a Group Criteria ID.

  Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.

- If you entered a query on the Group Profile page.

  You can't refine a group that is based on a query.

Field or Control	Description
Count Result	When you click the **Launch Count** button, the system displays the number of members in the group. If you used effective-dated records in the group definition, the group might include more than one row of data per employee. Each data row counts as one item in the **Count Result.**

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Field or Control	Description
Comments	Click this link to access the Group Build Definition View Page where you can enter comments or view the where clause that you defined on the Group Definition page.
Group Build Exceptions	Click this link to access the Group Build Exceptions Page, where you can identify people's jobs you want to include or exclude from this group.
 (launch count)	After you have defined criteria, identified exceptions, if any, and saved the page, click the **Launch Count** icon to compute how many members are in the group. If you selected the **Complex Group - Batch Process** check box on the Group Definition - Group Profile page, clicking **Count** sends the group to PeopleSoft Process Scheduler to be generated. If this is a complex group that you have already generated, clicking **Count** retrieves the number of rows in the group.
 (group visualize)	Click the **Group Visualize** button to build the group and to access the Group Result Page, where you get a list of all group members.

Where Clause

Field or Control	Description
Record	Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Build Criteria definition, you can't change the entry.
Field Name	Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the **Record** field. If you entered a group criteria ID on the Group Profile page, the system populates this field and you can't change the entry.
Label	The system populates this field when you move out of the field.
Operator	Define the field values to include in or exclude from the group. See the following Valid Operators table. **Note:** *(JPN)* If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job – Effective Date to *Current.* If you select *Current,* you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to *Current* here, you can run processes to extract other than current data by using the As of Date on the process page.

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Field or Control	Description
Edit Table	The system uses edit tables to validate the data that you entered in certain fields. If the **Field Name** that you entered is linked to an edit table, the system populates this field. **Note:** If the **Field Name** that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.
Value	Select a field value from the list.

Valid Operators

Description
Between
Current
Effdt < (Effective date is less than)
Effdt<= (Effective date is less than or equal to)
Effdt> (Effective date is greater than)
Effdt (Effective date is greater than or equal to)
Equal
Greater or Equal (Greater than or equal to)
Greater than
In List
Is Null (Field value equals 0)
Less or Equal (Less than or equal to)
Less than
Like
Maximum
Minimum
Not Between
Not Equal
Not Like
Not Null (Field value does not equal 0)
Not In List

Defining Groups with Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data

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- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

  For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

  For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

Operator	Description
Effdt<=	Effective date is less than or equal to.
Effdt>=	Effective date is greater than or equal to.
Effdt<	Effective date is less than.
Effdt>	Effective date is greater than.

Group Build Definition View Page

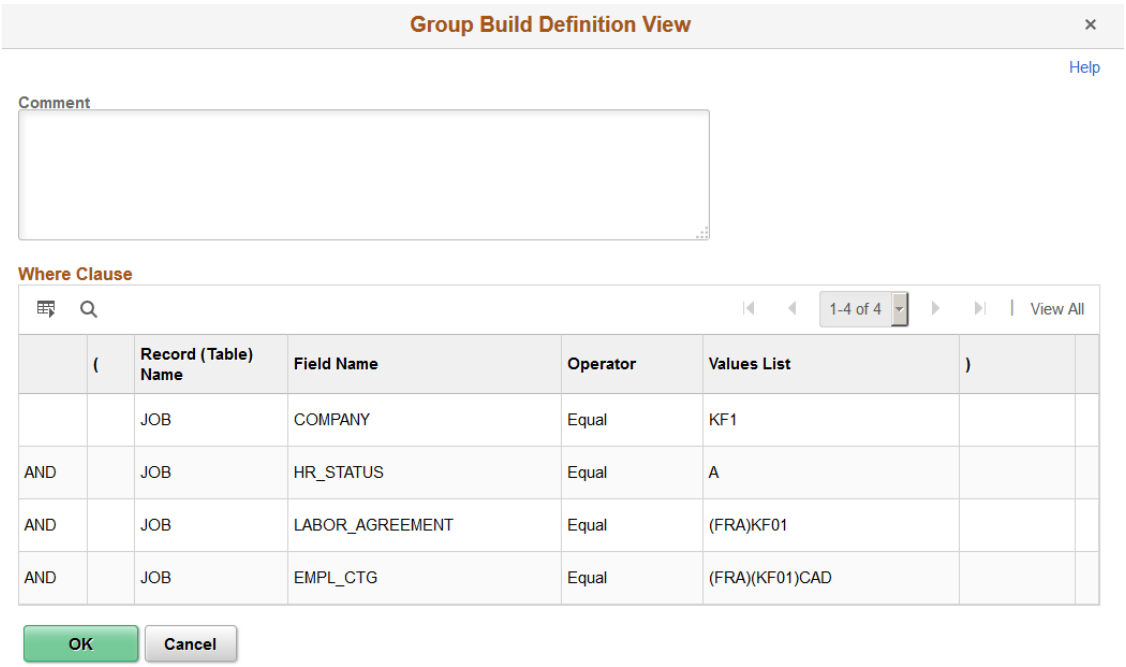
Use the Group Build Definition View page (GB_GRP_DEF1_SEC) to view the records, fields, field values, and operators that you've specified for the group definition.

Navigation:

Click the **Comments** link on the Group Profile page or the Group Profile or Group Definition page.

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

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Field or Control	Description
Where Clause	View the where clause as defined on the Group Definition page.

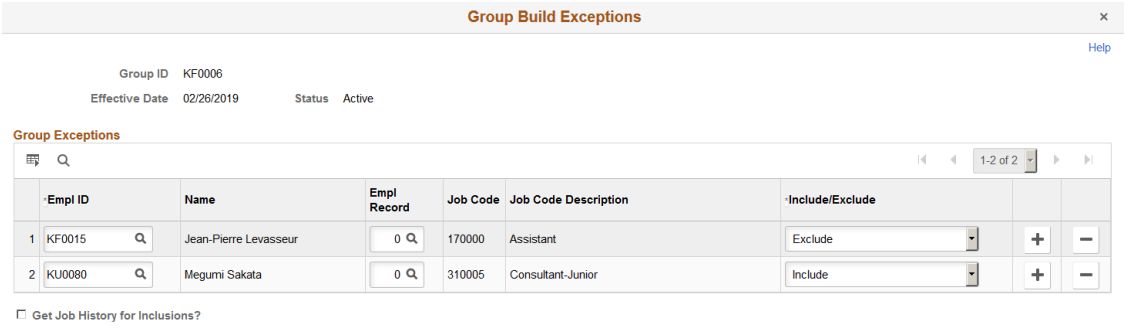
Group Build Exceptions Page

Use the Group Build Exceptions page (GB_GRP_OVRRIDE_SEC) to identify exceptions, such as additional employee jobs to include or exclude from a group.

Navigation:

Click the **Comments** link on the Group Profile page or the Group Profile or Group Definition page.

This example illustrates the fields and controls on the Group Build Exceptions page.



Use this page to exclude or include employee jobs in the group build. The system stores these EMPLID/EMPL_RCD combinations on the Group Exception table. The build process will include this Group Exception table when building the group.

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Field or Control	Description
Get Job History for Inclusions	Select this check box to include all of the history for the jobs selected for inclusion. When selected, the group will include multiple rows of data for each included job. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

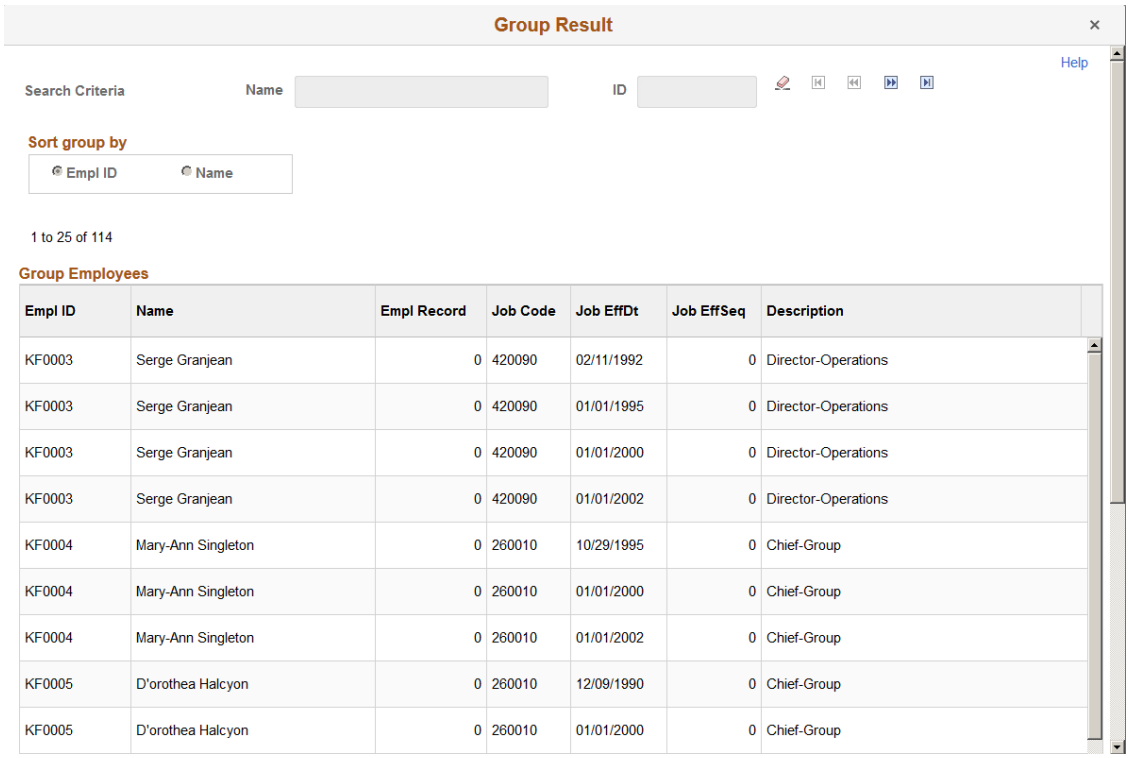
Group Result Page

Use the Group Result page (GB_GROUP_RES_SEC) to view and sort the members of the groups that you've built on the Group Build pages.

Navigation:

Click the **Group Visualize** icon on the Group Definition page.

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



Empl ID	Name	Empl Record	Job Code	Job EffDt	Job EffSeq	Description
KF0003	Serge Granjean	0	420090	02/11/1992	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/1995	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/2000	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/2002	0	Director-Operations
KF0004	Mary-Ann Singleton	0	260010	10/29/1995	0	Chief-Group
KF0004	Mary-Ann Singleton	0	260010	01/01/2000	0	Chief-Group
KF0004	Mary-Ann Singleton	0	260010	01/01/2002	0	Chief-Group
KF0005	D'orothea Halcyon	0	260010	12/09/1990	0	Chief-Group
KF0005	D'orothea Halcyon	0	260010	01/01/2000	0	Chief-Group

Using Group Member Chunking Controls

Because the number of group members could be very large, the system loads members into this page in chunks. You can determine the number of rows in a chunk in the Maximum Number of Rows for Scrolling field on the Installation Table. You manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

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> **Important**
>
> Group Build automatically joins the JOB, COMPENSATION, PERSON, and PER_ORG_ASGN tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.
>
> When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition JOB.EFFDT <= Given Date is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Use the following filters and navigator buttons to move from one chunk of members to another:

Field or Control	Description
Search on Name	Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered. You can use the wild card % to help select a record. For example, to search for all employees named John enter *%John*.
ID (employee ID)	Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.
Sort group by	Select whether you want the members to appear in order by **EmplID** (employee ID) or **Name.** **Note:** (JPN) The Sort group by feature is disabled when Japanese Kanji character sets are used in a Non-Unicode database with Japanese as the base language and login language.
	Click the **Refresh Search Fields?** button to clear all previously entered search criteria from the filter fields.
Search	Click the **Search** button to display the results of a new search. To the left of the **Sort group by** group box, the system displays which rows are visible compared to the total number of rows. For example, *1 to 4 of 4* means that rows 1 through 4 are displayed out of a total of 4 rows. **Note:** After you click **Search,** the button disappears from the page until you click the **Refresh Search Fields?** icon.

Related Topics

- Understanding Group Build
  These topics discuss how to:

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Company/Department Group Build Page

Use the Company/Department Group Build (group build from company and department) page (RUNCTL_GBP003) to create groups from departments by running the Group Build Construction SQR process (GBP003) to translate your existing company and department structure into group format.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Company/Department Group Build**, and then **Company/Department Group Build**

Run the Group Build Construction SQR process (GBP003) to translate your departmental structure into group format.

When the process is complete, you can use the Group Build pages to view the groups and verify that they were generated correctly.

Related Topics

- Understanding Automatic Generation of Groups by Department
  If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides the Group Build Construction SQR process (GBP003) for translating your departmental structure into group format. With this process, you create new groups that correspond to your existing company, setID, and department structure.

Setting Up Group Security

To set up group security, use the Group Build Security Default component (GB_GRP_DEFN_TABLE), Secure Group Build by Group component (GB_GRP_SEC_TABLE), and Secure Group Build by Operator component (GB_OPR_SEC_TABLE).

These topics provide an overview of group security and discuss how to:

Pages Used to Set Up Group Security

Page Name	Definition Name	Usage
Group Build Security Default Page	GB_GROUP_DFT_TBL	Set up default component access. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Secure Group Build by Group Page	GB_GRP_SEC_TBL	Set up security group build 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.

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Page Name	Definition Name	Usage
Secure Group Build by Operator Page	GB_OPR_SEC_TBL	Set up security by user. Specify the groups that the selected user can access and the components that the user can access for the group.

Understanding Group Security

Because you can group people together in any manner that suits your needs, including across companies or departments, groups have their own security structure that is separate from, and overrides, data permission security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes people in department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

> **Note**
>
> User profiles must have an associated person in order to be given security access to groups (the system will not list user IDs that don't have a person associated with them). This ensures that the security is assigned to a person and the activities involving the group can be tracked by the person. Assign people to user profiles on the User Profiles component in PeopleTools security.

Group Build Security Default Page

Use the Group Build Security Default page (GB_GROUP_DFT_TBL) to set up default component access.

Specify which components in your system can use or refer to groups that are created in the Group Build component.

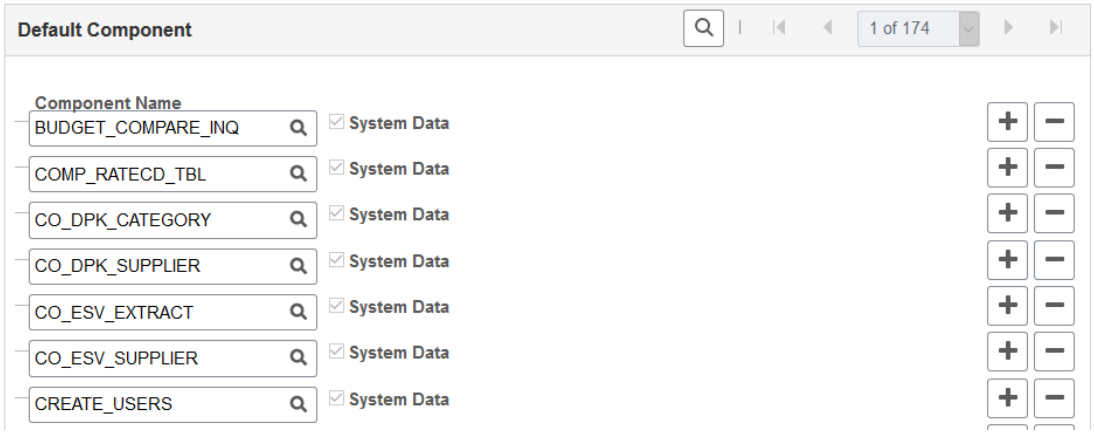
Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Group Build Security Default**, and then **Group Build Security Default**

This example illustrates the fields and controls on the Group Build Security Default page. You can find definitions for the fields and controls later on this page.

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Group Build Security Default



Field or Control	Description
Component Name	The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups. Components can refer to groups in one of two ways: • The page contains a field that prompts the user to supply a group ID. • The page displays a list of people who belong to a particular group. When you define group security for a particular group or user, you can import this default list into the Secure Group Build by Group and Secure Group Build by Operator pages. Then you can selectively delete components to make them unavailable to that group or user. To keep a particular component from appearing on the Secure Group Build by Group or Secure Group Build by Operator page, delete its name from the list.
System Data	View whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and deselected if the component is modified. You can't change this field.

Secure Group Build by Group Page

Use the Secure Group Build by Group page (GB_GRP_SEC_TBL) to set up security group build by group.

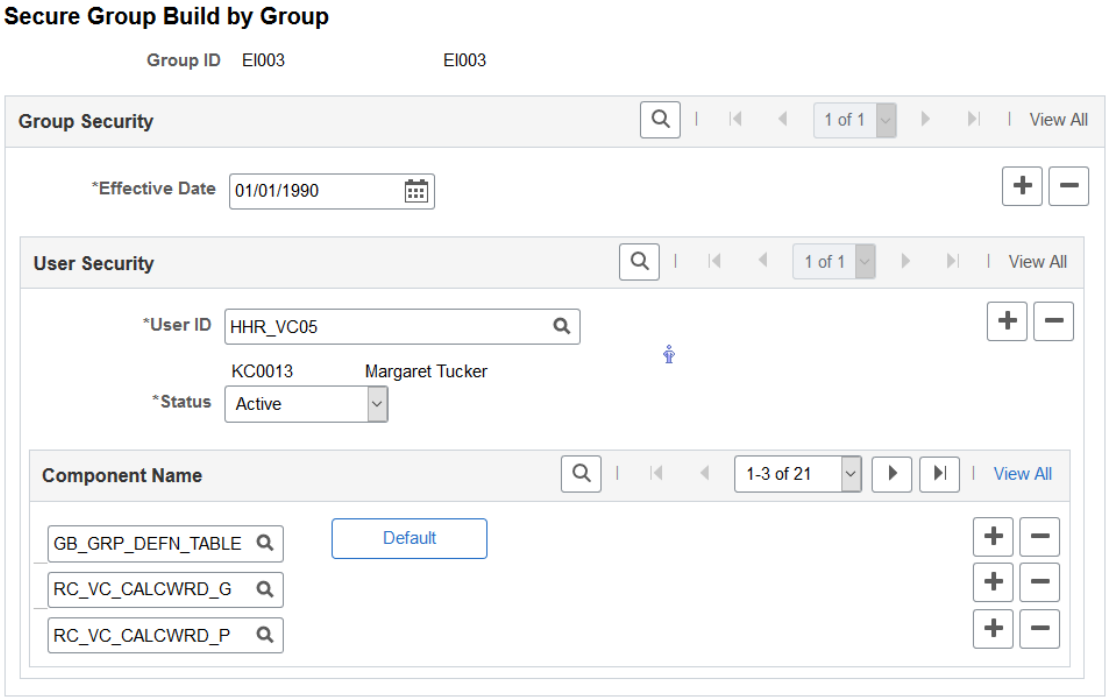
Specify the users who have security access to the selected group ID and the components that the user can access for the group.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Secure Group Build by Group**, and then **Secure Group Build by Group**

This example illustrates the fields and controls on the Secure Group Build by Group page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Effective Date	The date on which the security configuration takes effect. The default is to today's date. Change the date to grant security access as of a different date.
User ID	Select the ID of a user whose group access you want to set up or change.
(get employee ID)	If you know a person's ID but not the matching user ID, click the **Get Employee ID** icon to search for the person's user ID. The system displays the Search Operator ID box. Enter the ID and click OK to add the person's user ID to the user list, if it isn't already on the list. If you don't know the person's ID, click the **Look up EmplID** icon to search for it. The system displays a Look up EmplID page that you can use to search for the ID you want.
Status	Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.
Component Name	Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.

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Field or Control	Description
Default	Click this button to assign this user access to the current group from any default component listed on the Group Build Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group. See Group Build Security Default Page.

Secure Group Build by Operator Page

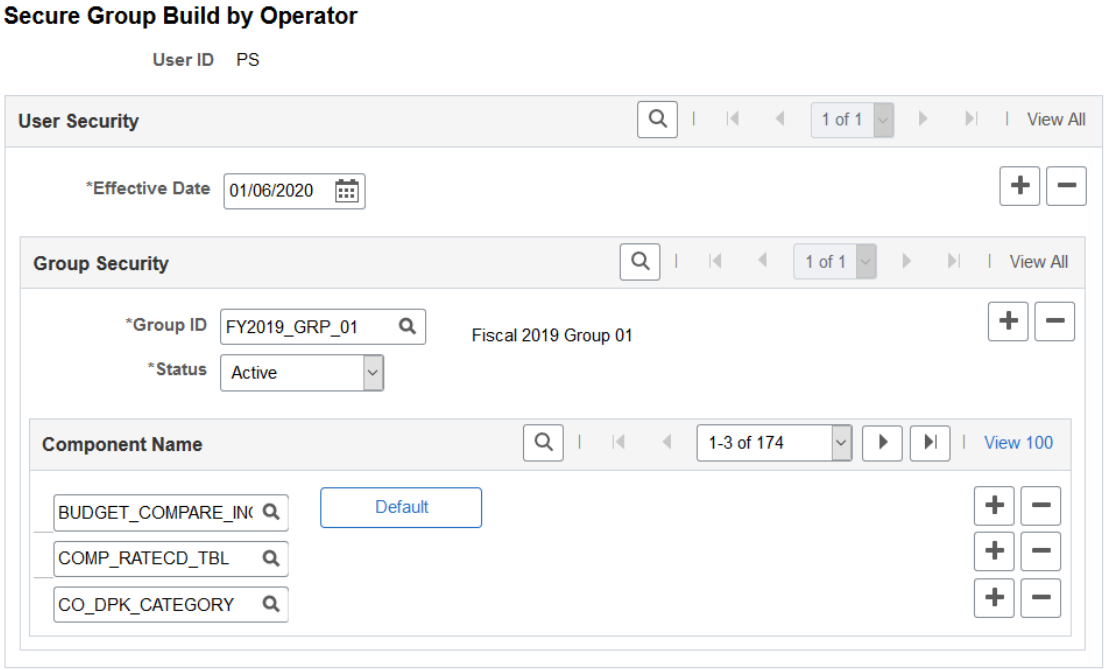
Use the Secure Group Build by Operator page (GB_OPR_SEC_TBL) to set up security by user.

Specify the groups that the selected user can access and the components that the user can access for the group.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Secure Group Build by Operator**, and then **Secure Group Build by Operator**

This example illustrates the fields and controls on the Secure Group Build by Operator page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Effective Date	The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.
Group ID	Enter the ID of the group to which you want to control this user's access.
Status	Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.
Component Name	Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.
Default	Click this button to assign this user access to the specified group from any default component listed on the Group Build Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group. See Group Build Security Default Page.

Refining Groups in PeopleSoft Applications

After you create the group definition, you refine group members at the application level.

You can define a group as of:

- A point in time.

  Some processes select only group members as of an effective date specific to the process. In this case, if the group is created with all job historical rows, the system selects only the data as of the effective date.

- A period of time.

  Some processes select group members who have job data between a from and a through date.

Related Topics

- Building Applications or Batch Programs that Include Group Build Functions
  These topics discuss how to:

Viewing Group Results and Reports

These topics provides an overview of group membership and discuss how to view complex group results.

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Pages Used to View Group Results and Reports

Page Name	Definition Name	Usage
Complex Group Results Summary Page	RSLT_SMRY_PNL	View the status of the complex groups that you created in the Group Definition component. You must already have run the background process to create the group.
Group Build Overlapping Page	RUNCTL_GBP001	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups.
Group Build Membership Page	RUNCTL_GBP002	Run the Group Membership report (GBP002). This report lists the members of selected groups.

Understanding Group Membership

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides an inquiry page and reports that you can use to view group members.

Related Topics

- Viewing Group Results and Reports
  These topics provides an overview of group membership and discuss how to view complex group results.

Common Elements

Field or Control	Description
Group ID	Enter the ID of the group whose members you want to view.
As Of Date	The report lists the members who belong to the group as of the current date, or as of the date you specify in the **Refinement Date** field.
Refinement Date	If the group definition includes effective-dated records, enter the date for which you want the records run. For instance, you might want to run a group with an effective date of January 1, 2000, but run the effective-dated rows in the group as of February 15, 2008. In that case, you would select a **Group As of Date** of January 1, 2000 and a **Refinement Date** of February 15, 2008. If you leave this field blank, the system will run the group as of the current date.

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Complex Group Results Summary Page

Use the Complex Group Results Summary page (RSLT_SMRY_PNL) to view the status of the complex groups that you created in the Group Definition component.

You must already have run the background process to create the group.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Complex Group Results Summary**, and then **Complex Group Results Summary**

You can designate any group as a complex group by selecting the **Complex Group - Batch Process** check box on the Group Definition - Group Profile page. The system creates complex groups by background process and notifies you when processing is complete.

Purging Group Results

These topics provide an overview of the group results and discuss how to:

Pages Used to Purge Results

Page Name	Definition Name	Usage
Group Build Purge Page	RUNCTL_GBP004	Delete (purge) the results of a previous version of a group from the Group Results Table.
Purge Group Build Results Page	RUNCTL_GBP005	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Understanding Group Results

Each time you generate and execute a group, the system stores the results in the Group Result Table. The next time you execute the same group, the system checks to see if the group's definition and date parameters have changed since the last time you ran the group. If they have, the system deletes the old results from the Group Results Table and saves the new results.

Group Build Purge Page

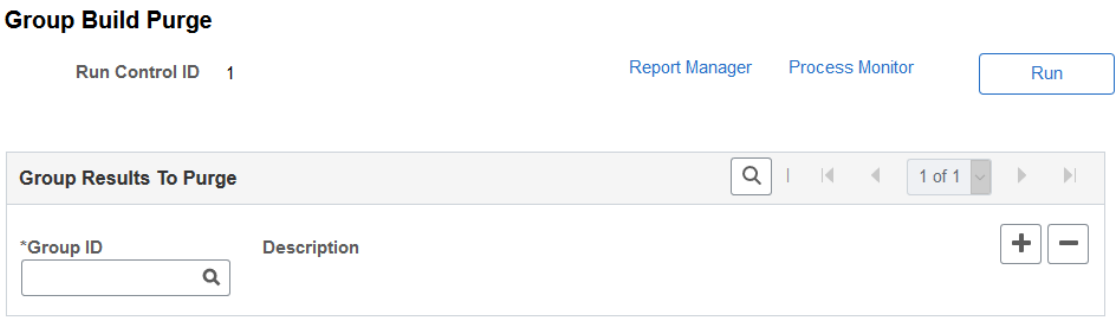
Use the Group Build Purge page (RUNCTL_GBP004) to delete (purge) the results of a previous version of a group from the Group Results Table.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Group Build Purge**, and then **Group Build Purge**

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

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The Group Build Purge process deletes *usable groups* —groups with results in the Group Results Table that are still in sync with the current group definition and can potentially be retrieved by the system.

Field or Control	Description
Group ID	Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

Purge Group Build Results Page

Use the Purge Group Build Results page (RUNCTL_GBP005) to delete the results from all of your groups from the Group Result Table.

You must have saved the group you want to purge before using this page.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Group Build**, and then **Purge Group Build Results**, and then **Purge Group Build Results**

The Purge Group Build Results process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

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Setting Up XML Reporting Framework

Understanding XML Reporting Framework

Before you can generate XML files for reporting, you must set up the components for XML file creation. The steps to set up XML files are listed below:

1. Set up XML code tables.
2. Define XML sets.
3. Set up XML node tables and node mapping.
4. Define XML templates.
5. Perform the steps to generate the XML file.

The XML generation process uses this dynamic setup data to create the XML files based on the specific needs of the report you are generating.

XML Code Tables

XML code tables are tables that list the valid values of an XML node. Code tables enable you to compile setup data through a single menu entry point. Use the XML Code Table (XML_CODE_TBL) component to define the auxiliary XML code tables and the valid values that your company uses. Once you define the XML code tables, you can use them to:

- Map system values to XML code table values for a node.
- Serve as validation tables for the values of a node.

You can perform both of these options when defining XML nodes through the XML Node Table component. Later in the business process, when you are completing a person's node data for an XML file during XML file generation, the system prompts you to select from the valid values that you have defined in the code table for the node.

XML Sets

An XML set is a group XML files. You can associate XML sets with functional areas. For example, Human Resources for Spain delivers XML sets for the Contrata, Delta, Contract Printing, and Tripartite Foundation functional areas.

Use the XML Set Table component to define XML set definitions for XML files. You associate XML sets with XML nodes through the XML Node Table component and with the XML templates through the XML Template Table component.

XML Node Tables

XML nodes are the core of the XML file setup. XML nodes are sets of tags within an XML file that determine the hierarchical structure of the file. They represent the XML tags that are mapped to HCM data. All tags between the open tag and closed tag of a node comprise the node. Use the XML Node Table component to define XML nodes and create the relationships between the nodes. The nodes that you create and relate to each other define the XML file

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structure. Through the XML generation process, the system can retrieve data that is already stored in the HCM database and write the data into the appropriate XML nodes.

You can define complex nodes or simple nodes. Complex nodes are composed of other simple or complex nodes. Complex nodes can be root nodes or children nodes. There can only be one root node per XML template that you define. A root node defines a specific XML file layout. For further embedding of XML tags, children nodes can also contain their own children nodes. Simple nodes are associated with values. To derive the values of simple nodes, you can use as source data manual values that you enter or system values.

Sometimes the data with the system as the source from which you are deriving the values of the nodes does not match the data that you need for the XML file. In such cases, you can also use the XML Node Table component to map the system data values to alternate values that fit your reporting needs. For example, PeopleSoft system data uses gender values M (male) and F (female). However, in case of GP Spain, I.N.E.M. uses H (hombre/male) and M (mujer/female). You can use the XML Node Table component to map these PeopleSoft system values to the corresponding Spain-specific I.N.E.M. values.

XML Templates

XML templates define the type of communications within each functional area, identifying the complete XML structure of the XML file that you generate for each communication. An XML template holds the keys and root node for runtime data retrieval for the XML generation process. When defining each template, you assign a root node. The root node thus contains the whole information for all of the nodes in the template thereby defining the XML file structure. At runtime, the system uses these keys to retrieve the correct values for the fields as part of the SQL Select statement when retrieving the data for the children nodes of the root node that you associate with the XML template in its definition.

Setting Up XML Reporting Framework

This topic discusses setting up the XML reporting framework.

Pages Used to Set Up XML Reporting Framework

Page Name	Definition Name	Usage
XML Code Tables Page	XML_CODE_TBL	Define the auxiliary XML code tables and the valid values that your company uses for XML nodes.
XML Set Table Page	XML_SET_TBL	Maintain XML set definitions.
Node Table Page	XML_NODE_TBL1	Define the nodes that comprise the XML file structure for your country-specific functionality.
Node Mapping Page	XML_NODE_TBL2	Map existing system values for nodes to alternate values that the XML file requires.
XML Template Page	XML_TEMPLATE	Define templates for use during XML file generation.
XML Tester Page	XML_RC_TESTER	Allow running any XML file defined using previous setup, so that the user can validate if the resultant report is the expected one.

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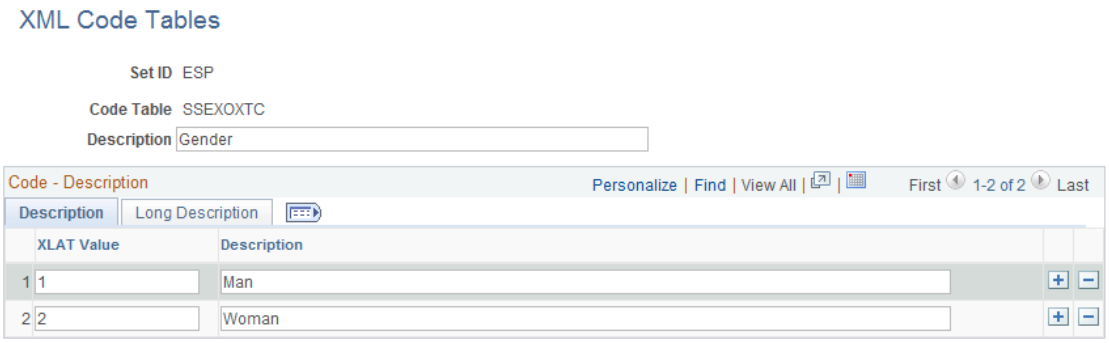
XML Code Tables Page

Use the XML Code Tables page (XML_CODE_TBL) to define the auxiliary XML code tables and the valid values that your company uses for XML nodes.

Navigation:

Set Up HCM, and then **Common Definitions,**, and then **XML Report Framework**, and then **XML Code Tables**

This example illustrates the fields and controls on the XML Code Tables Page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Code Table	The name of the code table.
Description	Enter the description of the code table.

Field or Control	Description
XLAT Value	Enter the translate value for the code table.
Description	Enter the description of the translate value.

XML Set Table Page

Use the XML Set Table page (XML_SET_TBL) to maintain XML set definitions. For example, Human Resources and Global Payroll Spain provide XML sets for:

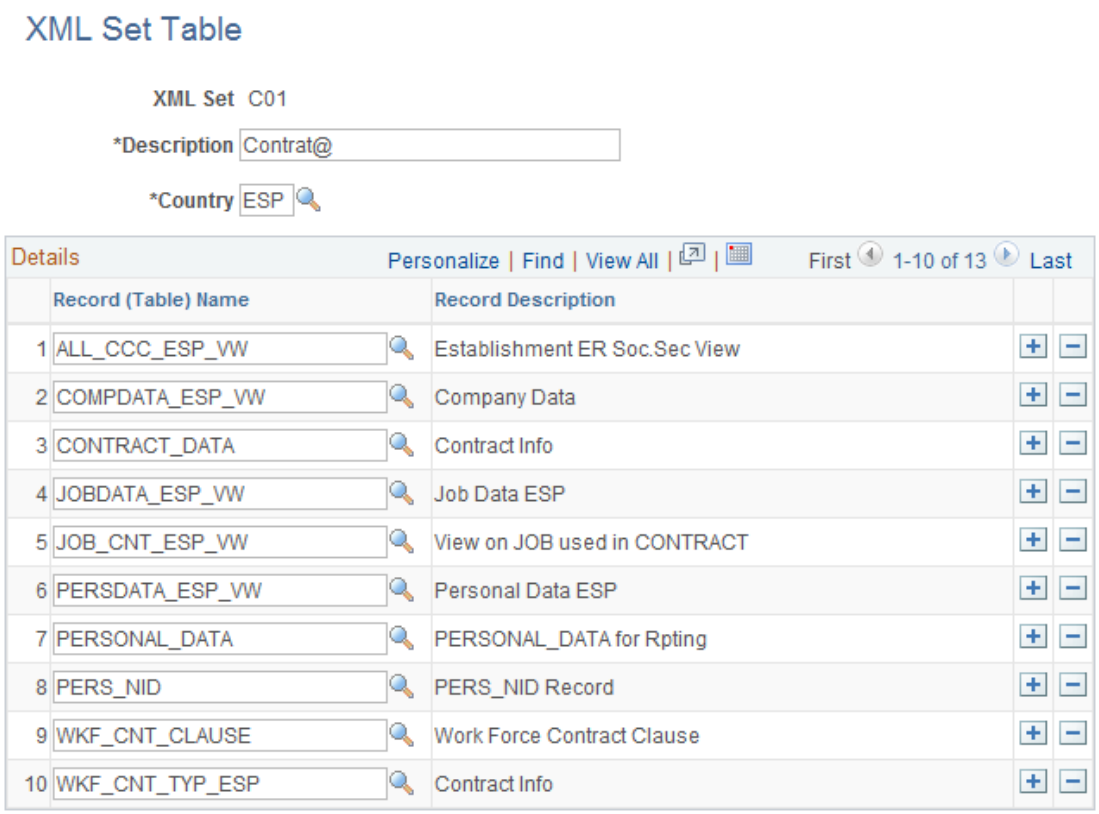
- Delta reporting
- Contrat@ reporting
- Tripartita Foundation reporting
- Contract printing
- Company Certificates
- Cret@ reporting

Navigation:

Set Up HCM, and then **Common Definitions**, and then **XML Report Framework**, and then **XML Set Table**

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This example illustrates the fields and controls on the XML Set Table Page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
XML Setand**Description**	Displays the XML set code and description.
Country	Select the country for which the XML set is being defined.

Field or Control	Description
Record (Table) Name	Enter the record name eligible to work with this XML Set. The records entered here will be available in other parts of this framework.
Record Description	Displays the description of the record or table you selected.

Node Table Page

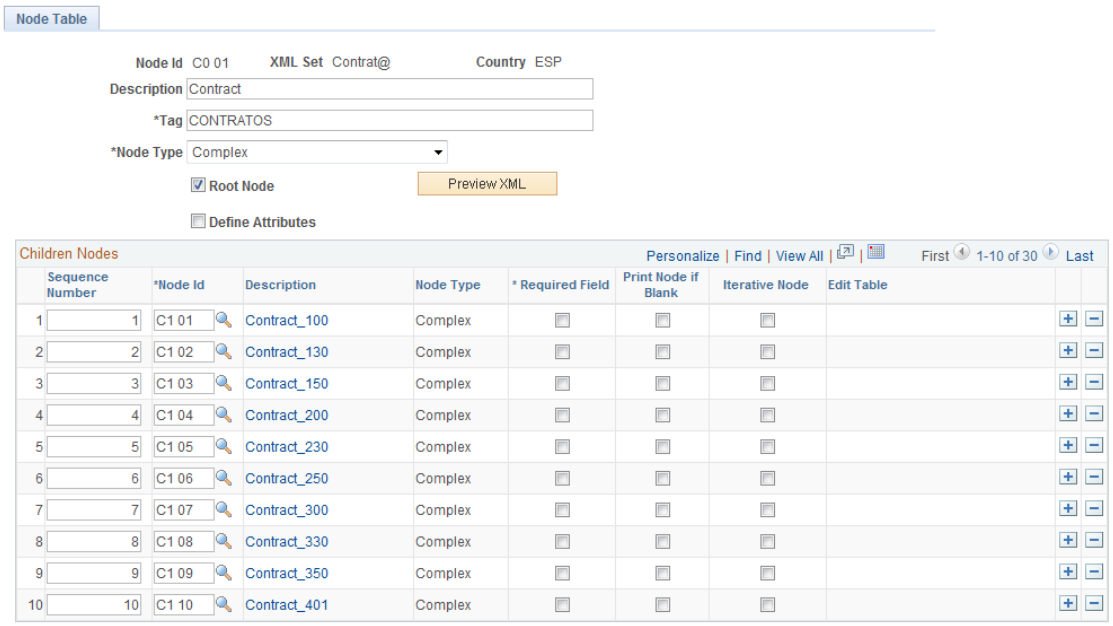
Use the Node Table page (XML_NODE_TBL1) to define the nodes that comprise the XML file structure for your country-specific reporting.

Navigation:

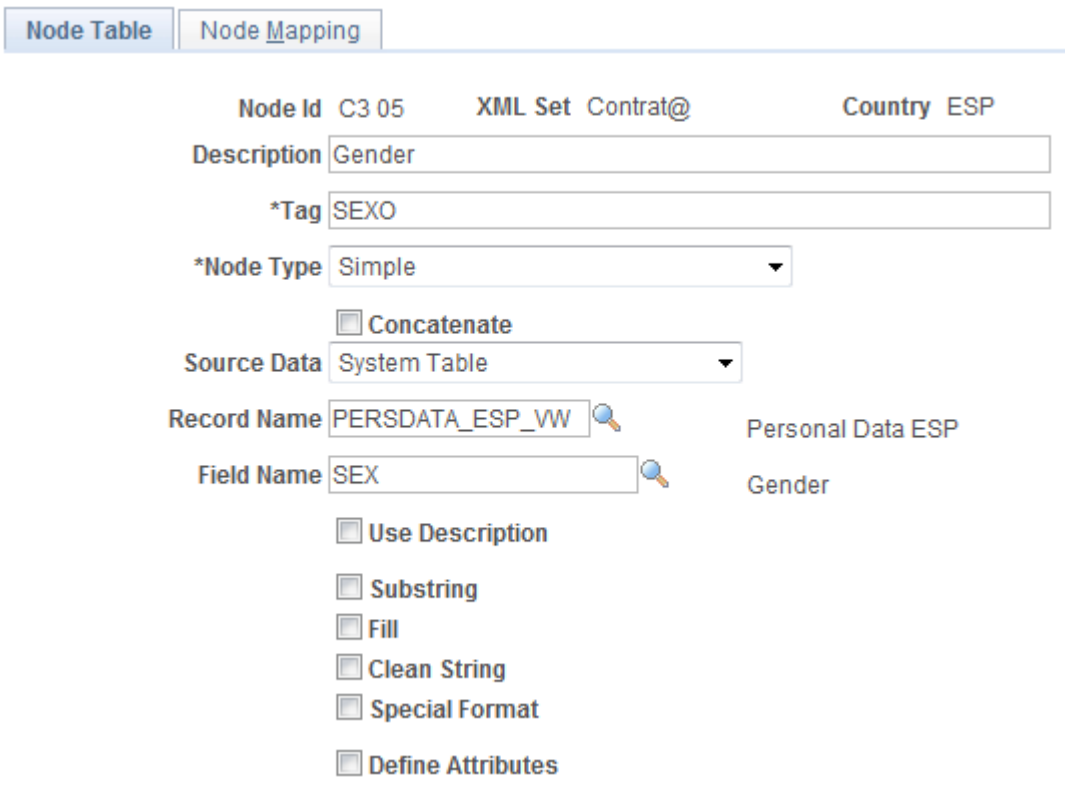
Set Up HCM, and then **Common Definitions**, and then **XML Report Framework,**, and then **XML Node Table**

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



This example illustrates the fields and controls on the Node Table Page (simple node type). You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Node Id	When creating a new node, enter a code to identify the node.
XML Set	Select the XML set to specify the functional area for which you are defining this node.
Country	Displays the country associated with the selected XML set.
Description	Enter a description of the node.
Tag	Enter the name of the XML tag for the node.
Node Type	Select whether the node is *Simple* or *Complex*. Simple nodes are associated with values, whereas complex nodes are composed of other simple or complex nodes.
Root Node	Select this check box to indicate that this complex node is a root node, meaning that it is the node from which all other nodes in the XML file structure are derived. This field appears only when the node type is Complex.
Preview XML	Click this button to access the XML Preview ESP page, where you can preview the XML file structure for the complex node. You can only preview XML files structure for complex node types. This button appears only when the node type is *Complex*.
Concatenate	Select this check box if the data in this node is the concatenation of two or more fields in the database. The system displays the **Node ID** field for you to select the concatenated node. This check box becomes available for edit only for simple nodes.
Node Id	Select the concatenated node. This field becomes available only if you select the **Concatenate** check box.

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Field or Control	Description
Source Data	Select how you want to define the source data for the node. During XML file generation, the system uses the option that you select to retrieve and validate node values in the XML file. This field becomes available for edit only for simple nodes. Valid values are: • *Manual*: Select this option for those nodes for which the data is not stored in the HR system, so the system will request its value to be entered manually when generating the file. Selecting this option enables you to validate a node value against the specific XML code table, translate field, or date format that you specify. Or you can specify that there be no validation, enabling the user to enter any node value into an open entry field. • *System*: Select this option to indicate that the valid values for the node already exist in the application as part of a special view designed specifically for XML files. After selecting this option, you then need to specify which record (view) and field contains the valid values for the node. The **Record Name** field, **Field Name** field, and Node Mapping page become available for edit. You must select this option if you need to map a system value to an alternate value.
Record Name and **Field Name**	The system displays these fields when you select system data as the as source data of a simple node. If you select the System value in the Source Data field, you then need to specify which record and field contain the valid values for the XML node. To specify a record and field, first select a record from the list of valid records (added using the XML Set Table page). Then select a field from the list of available fields in the view. The system uses your selection to retrieve data when generating XML files.

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Field or Control	Description
Validation Type	Manually select the type of data validation that you want to occur when the system validates the node values that users enter for a person in an XML file. This field becomes available only when the Source Data field value is manual. Valid values are: • *Code Table*: Select this option if you want the node value to come from a table of values as defined on the XML Code Table page. The system displays the Code Table field for you to select the specific table. • *Date*: Select this option if you want the node value to be a date. The system displays the Formatted field for you to select the date format. • *None*: Select this option if you do not need validation of the node value. The system displays the Node Value field as an open entry field on the Details page of the XML file generation pages. Users can enter any value for the node because the field that has no edits for validation • *Xlat Field* (translate field): Select this option if you want node value to come from a translate table for a specific field. The system displays the Field Name field for you to select the field from which the system prompts users with translate values.
Default Value	For a simple node where the source is manual, you can set up a default value. This field is available only when you select manual in the Source Data field.
Use Description	Select this check box if you want to print the **Description**, instead of the Code. This field is available only if the field that you selected has a XLAT associated or it has a prompt table with a DESCR field.
Use Related	Select this check box if you want to print any data from the prompt table associated to this field. This field is available only if the field you selected has a prompt table.
Substring	Select this check box if you want to print just a part of the field value. On selecting this check box, you have to enter the **Start Position** and **Length** value.
Fill	Select this check box if you want to populate the field value with the character specified in the **Char Fill** field to complete the length that you need.

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Field or Control	Description
Clean String	Select this check box if you want to remove one or more characters specified in the **Character to Clean** field.
Special Format	Select this check box if you want to use one of the special formats defined in the framework: • Decimal Separator is a Comma. • Decimal Separator is a Point. • First Map then Concatenate. • Hours & Minutes. • Remove Spaces. • Transforms Percents in 4 Digits. • Transforms Zero to Space.
Define Attributes	Select this check box if you want to enter attributes to the node.
Reg Region (regulatory region)	Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region. This field is available only for simple node types that use code tables.
Code Table	If you select a validation type of code table, select the table from which you want the system to prompt users with values to select for a node. This field is available only for simple node types that use code tables.
Formatted	Select how you want the date field to be formatted. This field is available only if you select a validation type of Date.
Field Name	Select the field from which the system prompts users with translate values. This field is available only if you select a validation type of Xlat Field.

Children Nodes

Use this group box to define the children node members of a complex node. All children nodes that you define for a given node appear at the same level in an XML file structure. If children nodes are complex nodes that require their own children nodes, you must define members for these nodes in their own node definition. This group box appears only when the node type is *Complex*.

Field or Control	Description
Sequence Number	Enter the sequence in which you want the children nodes to appear in the file structure within the parent node. The system arranges the children nodes in order from lowest to highest.

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Field or Control	Description
Node ID	Select the child node. Define child nodes using this same component.
Description	The system displays the description of the child node.
Node Type	The system displays the node type of the child node, either *Simple* or *Complex*.
Required Field	Select this check box to make this node a required field in the XML file. When you validate the XML file through the appropriate reporting component, the system requires that the user enter a value for this field before generating the XML file.
Print Node if Blank	Select this check box if you want an XML file to contain a specific node even if the value is null.
Iterative Node	Select this check box to indicate that you can repeat this node inside the XML file.
Edit Table (Iterative Record)	Enter the record that contains the iterative data. Select the record from the XML Set page. This field is available for editing only if the **Iterative Node** check box is selected.

Node Mapping Page

Use the Node Mapping page (XML_NODE_TBL2) to map existing system values for nodes to alternate values that the XML file requires.

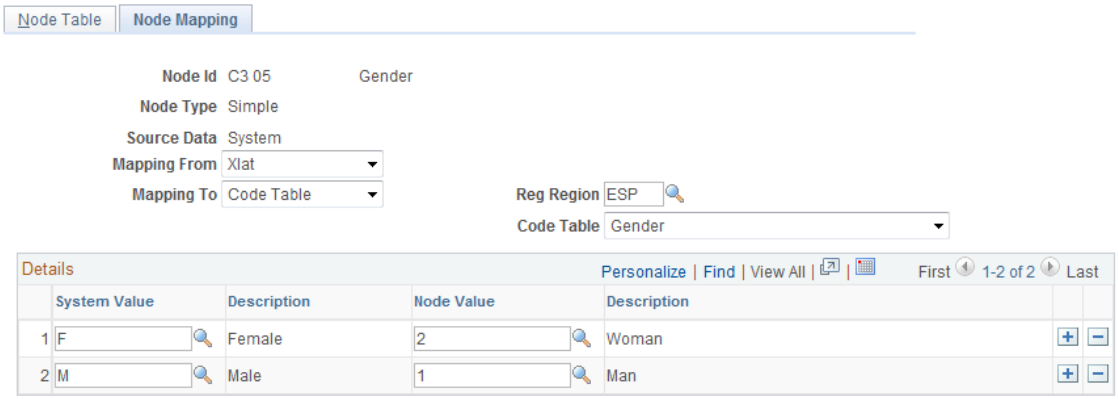
Navigation:

Set Up HCM, and then **Common Definitions**, and then **XML Report Framework**, and then **XML Node Table**, and then **Node Mapping**

> **Note**
>
> This page becomes available only when you define the Node Type as Simple and the Source Data as System on the Node Table page.

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

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Use this page in cases where the values for the node exists in the application but the system values do not match the values that the XML file requires. Through this page, you can map the existing system values to other, more appropriate values that you must use for the XML file.

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Field or Control	Description
Mapping From	For the field that you are mapping from, select how the field derives its valid values. After you make a selection, use the System Value field in the grid below to specify the system field values from which you want to map to alternate values. Your choices are: • *Manual*: Select this option if the system values are derived manually through user entry and you want to map these values to other values. Fields such as these are defined as having no edit, thus enabling manual entry. The System Values field in the grid prompts you to manually enter each system value that you want to map to another value. • *None*: Select this option if there is no need to map system values for the field that you specify in the Field Name field on the Node Table page to another value. • *Record*: Select this option if the system values are derived from a prompt table and you want to map values in the prompt table to other values. Then use the Edit Table field, which becomes available, to specify the prompt table from which the field derives its valid values. The System Values field in the grid prompts you to select each prompt table value that you want to map to another value. • *Xlat (translate)*: Select this option if the system values are derived from a translate table and you want to map these translate values to other values. The System Values field in the grid prompts you to select each translate value that you want to map to another value. **Note:** To successfully map system values to an alternate value, you must know the type of table edit that is associated with the field that you are mapping. In this way you preserve data integrity so that the system is able to accurately remap values during data validation of an XML file. You select the field on the Node Table page in the Field Name field.
Edit Table	If you select to map field values from a record, select the prompt table from which the field derives its valid values.

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Field or Control	Description
Mapping To	Select how you want to define the new valid field values that you are mapping to. After you make a selection, use the **Node Value** field in the grid below to specify the new value to replace the system value. Your choices are: • *Code Table*: Select this option to map values to a value that exists on an XML code table. The **Code Table** field becomes available for edit. • *Manual*: Select this option to map system values to a value that you manually define. • *None*: Select this option if there is no need to map system values to another value.
Reg Region (regulatory region)	Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.
Code Table	If you select to map new field values to values from an XML code table, select the code table. Define XML code tables on the XML Code Table page.
System Value and **Description**	Specify the system field value from which you are mapping to another more appropriate value for the XML file. If you are mapping from a field where the valid values are derived from translate tables or prompt tables, select the value that you want to change. If you are mapping from fields where the valid values are derived by manual entry into the system, enter the value that you want to change. The value that you enter manually must be identical to the value defined through user entry. For translate values and table record values, the system displays the description of your selection.
Node Value and **Description**	Select or enter the node value to which you are mapping the system value. If you have selected to map to a code table in the **Mapping To** field, the system prompts against the values in the XML code table that you specify. For XML code table values, the system displays the description of your selection.

XML Template Page

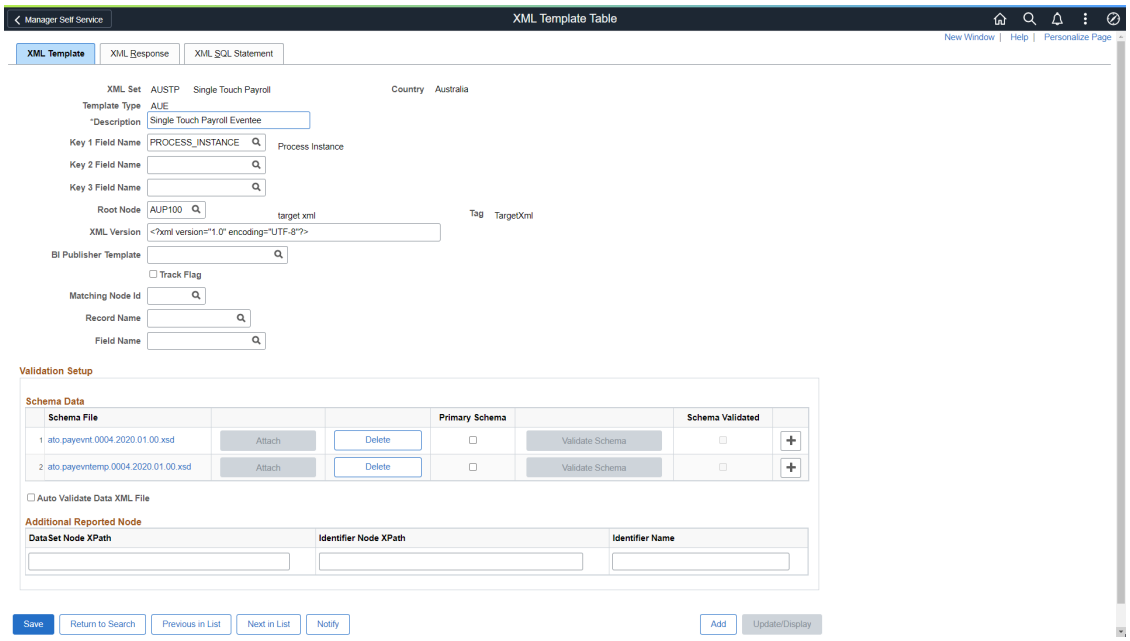
Use the XML Template page (XML_TEMPLATE) to define templates for use during XML file generation. The XML set defines the functional area, whereas the XML template defines the specific XML scheme.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **XML Report Framework**, and then **XML Template**

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



Field or Control	Description
XML Set	When defining new XML templates, select the XML set to which the template belongs.
Template Type	The identifying code of the template.
Description	Enter a description of the XML template.
Key 1 Field Name Key 2 Field Name and **Key 3 Field Name**	Specify the fields that you want to use as keys for the different levels of data that you are reporting with the XML template. These fields indicate the key structure of the table from which the system retrieves data for reporting through XML files. For example, in case of GP Spain, with Contrata reporting you define EmplID and EFFDT as the key fields to indicate that you are reporting employee information based on the effective date of the contracts. With Delta reporting in GP Spain (XML Set = D01), you define three levels – company, employee, and effective date (or the incident) - to deliver XML files that include information keyed at the company level, employee level, and incident level. When you map a node to a record and field that exist in the database through the XML Node Table component, the record that you select must have at least one of these keys as a record key because the Where clause is built dynamically to use these fields.

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Field or Control	Description
Root Node	Select the root node for the XML template. By identifying the root node for the XML template you are setting the whole structure of the XML file because the root node contains in a recursive mode the whole structure. The root node is the starting point of the XML structure. Define root nodes on the XML Node Table page.
XML Version	Specify the version of the XML files that are based on this template. Each XML file needs to include a first line that states the version.
BI Publisher Template	Select the BI Publisher template to which you want to link the XML template. This enables you to create a PDF document that helps you visualize the report.

Schema Data

Use this section to validate the XML structure against the schema. You can attach one or more schema files (*.xsd) and validate if the order is correct or if node is missing.

Field or Control	Description
Attach	Click this button to attach one or more schema file for validation.
Delete	Click this button to delete an already attached schema file.
Primary Schema	Select this check box to set the selected schema as the primary schema. **Note:** Only one schema can be set as primary schema.
Validate Schema	Click this button to validate the XML structure against the attached schema files. If the validation fails, it shows a warning message.
Schema Validated	If the XML structure validation is successful, the check box appears selected. **Note:** Only primary schema can be used for XML structure validation.
Auto Validate Data XML File	If you select this check this box, the XML file generated by the XML framework application engine will be automatically validated against the attached schema files(XSDs) and corresponding log file will be generated.

Additional Reported Node

Use this section to add relevant node of XML to be displayed in the log file, if you have selected the *Auto Validate Data XML File* check box.

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> **Note**
>
> If you left this section blank, the log file will be created in the default format with severity, line number, column number and error. In that scenario, the user has to open the XML file, check the line number, identify the error and find out the identifiers like employee, company etc to which it belongs manually. If not, line number and column number column will be replaced by the node provided by the user and will be listed under the given heading (Identifier Name).

Field or Control	Description
DataSet Node XPath	Enter the absolute path (beginning from XML root node) to the dataset node that is getting validated.
Identifier Node XPath	Enter the relative path as per Data Set node that needs to be printed.
Identifier Name	Enter the identifier. This will be the column heading in the log file. **Note:** If not provided the identifier node name will be used as column heading.

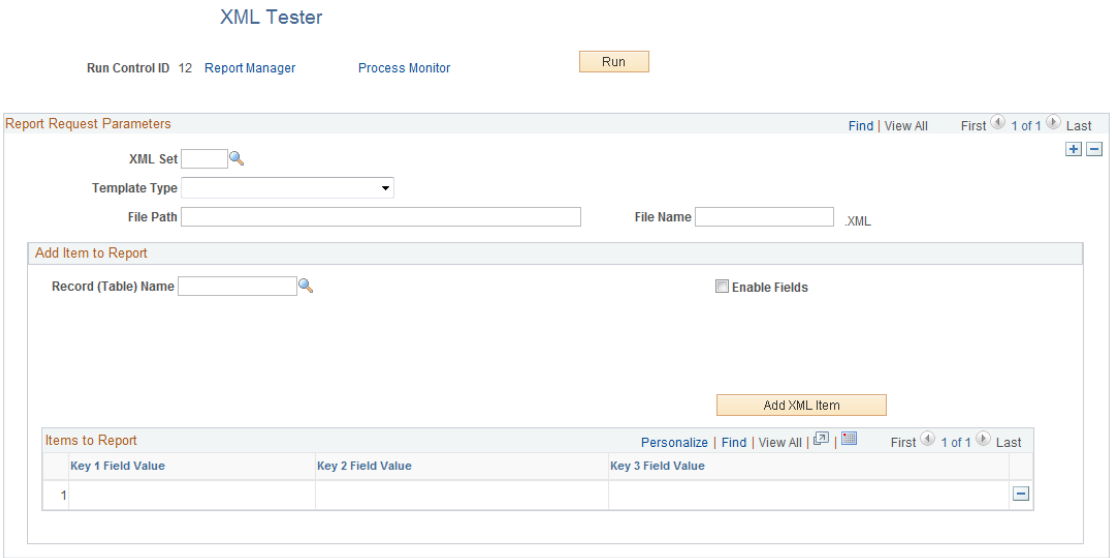
XML Tester Page

Use the XML Tester page (XML_RC_TESTER) to verify if the XML structure is working fine. This allows you to run a new XML report without creating a specific run control page, preferably during implementation phase to test new XML files.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **XML Report Framework**, and then **XML Tester**

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



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Field or Control	Description
XML Set	Select the XML set to verify.
Template Type	Select the template type of the XML set to verify. The key fields in the **Add Item to Report** group box vary based on the template type you select.
File Path and **File Name**	Enter the server file path and the file name.

Add Item to Report

Use this group box to view the iterative data to be reported.

Field or Control	Description
Record (Table) Name	If the XML file has a unique iterative node right under the root node, the system retrieves the Record Name associated to that iterative node (Iterative Record) and displays here.
Enable Fields	Select this check box to overwrite the key fields defined in the XML Template.
Add XML Item	Click this button to add the items to the Items to Report grid. This adds an iterative complex node under the root node.
Key 1 Field Name, **Key 2 Field Name** and **Key 3 Field Name**	The key field names get populated when you select the Template Type. These correspond to the key fields defined in the XML template.
Key 1 Field Value, **Key 2 Field Value** and **Key 3 Field Value**	Select or enter the value for each key field.

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Administering the HCM System

Analyzing Portal Navigation

To analyze portal navigation, use the Portal Analysis component (RUNCTL_PORTAL).

This topic discusses how to analyze HCM portal navigation.

Page Used to Analyze Portal Navigation

Page Name	Definition Name	Usage
Portal Analysis Page	RUNCTL_PORTAL	Analyze the portal navigation structure for users, roles or permission lists.

Portal Analysis Page

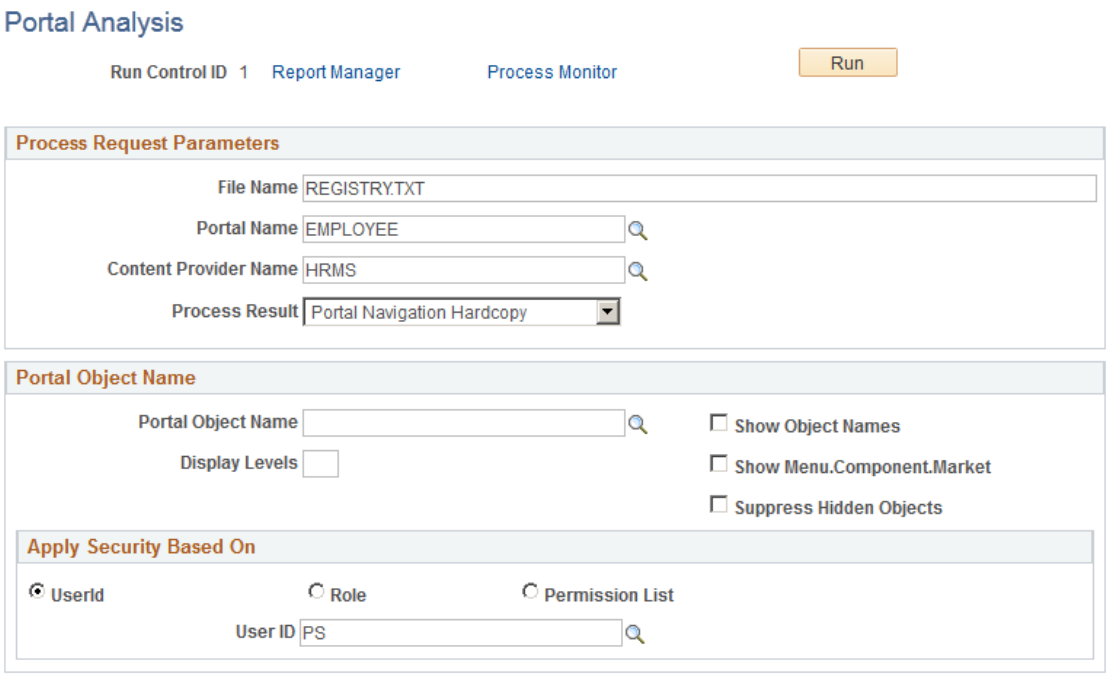
Use the Portal Analysis page (RUNCTL_PORTAL) to analyze the portal navigation structure for users, roles or permission lists.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Portal Analysis**, and then **Portal Analysis**

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

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Field or Control	Description
File Name	Enter the name of the file you want the process to create and populate with the portal analysis. The process will distribute the file to the reporting repository.
Portal Name	Enter the name of the portal you want to analyze.
Content Provider Name	Select *HRMS* in the **Content Provider Name**field to analyze HCM portal navigation.
Process Result	Select the processing result from the following options: • *Portal/Menu Path* The result creates a straight list of the portal and menu paths. This result does not use the other values on the page so the system hides them when you select this option. • *Portal Navigation Hardcopy* This result gives you more options and can create a more hierarchical view of the navigation.
Portal Object Name	Select the portal object name.
Display Levels	Enter the number of portal levels to print. Leave empty to print all the levels.
Show Object Names	Select to display the object names of the CREFs or folders. If you leave this check box deselected, the process will just display the labels.
Show Menu.Component.Market	Select to display the CREFs menu, component, and market information.

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Field or Control	Description
Suppress Hidden Objects	Select to keep the process from including hidden objects. If you leave this check box deselected, the system identifies hidden objects with the following text preceding the object name: *hidden*.

Apply Security Based On

Select to analyze the portal navigation for the security access assigned to a *UserId, Role,* or *Permission List.* Select the userID, role, or permission list to use.

Restricting the Deletion of IDs

To restrict the deletion of person IDs, use the Person ID Delete Control component (ID_DEL_PRVNT_TABLE).

These topics provide an overview of how to prevent the deletion of IDs from critical records and discusses setting up the person ID delete control.

This video demonstrates the data privacy enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 25: Data Privacy Enhancements

Page Used to Restrict the Deletion of IDs

Page Name	Definition Name	Usage
Person ID Delete Control Page	ID_DEL_PRVNT_TABLE	Identify priority records where, if person data exists, the system will prevent a user from deleting the person ID from the system. You can also identify tables where person data will not be deleted during the deletion process.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Changing and Deleting IDs

Understanding Person ID Delete Control and Security Roles

The Person ID Delete Control feature enables administrators with the proper security access to define records that will prevent users from deleting IDs on which others at your organization might rely. With priority data in place, the system will not permit users to delete a person ID when data exists in these records. These administrators can also identify specific records to be excluded from the deletion process.

The PeopleSoft system delivers predefined ID delete control priority tables and fields for individual and organization IDs (see the Control/Record/Fields section). Corresponding messages are preset to appear when you try to delete a person ID with data in any of the associated control records and fields. Administrators use the **Control Records/Fields** grid on the Person ID Delete Control Page to remove or include additional priority data to control the

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deletion of IDs. The administrator can use the **Exclude Records** grid box to define specific records to exclude from deletion when running the process. This enables you to retain data in specific tables, including audit and archived tables.

The administrator can also use the Person ID Inclusion Page to include records and fields that store the employee ID but are not considered in the change and delete processes.

When a user with the proper role accesses the PeopleSoft Human Resources Administer Workforce: Person ID Delete Page to run the delete process, the user has the option to select the **Skip Control Record/Field Check** and **Skip Record Exclusion Check** options. When these options are selected, the record control and exclusion settings are ignored and all person data is deleted.

Oracle delivers two roles related to the option to exclude records from the deletion process. Assign users these roles to perform the following:

Term	Definition
ID Delete Administrator	Provides the ability to delete or add to the delivered payroll Control Record/Field record rows as well as manage the **Exclude Records** list on the Person ID Delete Control Page. For other users, this page is display only.
ID Delete User	Enables the user to override the control check (**Skip Control Record/Field Check** and **Skip Record Exclusion Check**) options on the PeopleSoft Human Resources Administer Workforce: Person ID Delete Page. For other users, this option is disabled.

Person ID Delete Control Page

Use the Person ID Delete Control page (ID_DEL_PRVNT_TABLE) to identify priority records where, if person data exists, the system will prevent a user from deleting the person ID from the system. You can also identify tables where person data will not be deleted during the deletion process.

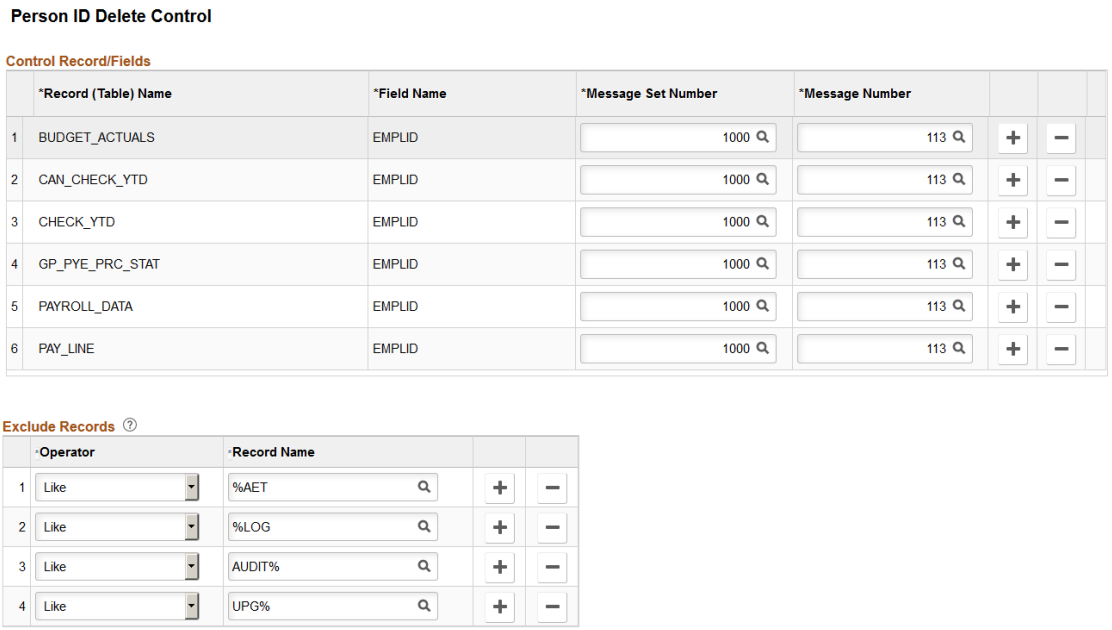
This ensures that the information is stored for historical purposes.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Person ID Delete Control**, and then **Person ID Delete Control**

This example illustrates the fields and controls on the Person ID Delete Control page.

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Person ID Delete Control

Control Record/Fields

	*Record (Table) Name	*Field Name	*Message Set Number	*Message Number
1	BUDGET_ACTUALS	EMPLID	1000	113
2	CAN_CHECK_YTD	EMPLID	1000	113
3	CHECK_YTD	EMPLID	1000	113
4	GP_PYE_PRC_STAT	EMPLID	1000	113
5	PAYROLL_DATA	EMPLID	1000	113
6	PAY_LINE	EMPLID	1000	113

Exclude Records

	*Operator	*Record Name
1	Like	%AET
2	Like	%LOG
3	Like	AUDIT%
4	Like	UPG%

Important

As delivered, only users with the role *ID Delete Administrator* can modify this page.

Control Record/Fields

The ID on each of the following payroll control records and the associated messages are delivered predefined as priority data for HCM:

- GP_PYE_PRC_STAT
- PAY_LINE
- CHECK_YTD
- CAN_CHECK_YTD
- PAYROLL_DATA
- BUDGET_ACTUALS

Although the administrator can remove any of the delivered records, enabling the ability to delete person IDs that have data related to this data, Oracle recommends that you do not delete the rows of predefined payroll control records. Keep these as your base ID delete control records for individual IDs and define additional priority data as necessary.

Note

You can override the record controls identified here on a case by case basis on the PeopleSoft Human Resources Administer Workforce: Person ID Delete Page.

To define an additional control record, or to add an additional field from the same record, click the **Add a new row** (+) button at the level where you want to insert it. The system enters a new

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row and renumbers the sequence of control records. Select the record name, field name, and message data. The new row is not added until you click **Save.**

Field or Control	Description
Record (Table) Name	Displays the name of the record that contains the priority data field.
Field Name	Displays the name of the field that, when data exists in it, prevents the deletion of the ID.
Message Set Number	Enter the set number of the message to display when data exists in the priority data field.
Message Number	Enter the number of the message to display when data exists in the priority data field. **Note:** If you need to create user-configurable messages, create them in Message Sets 20,000-29,000 to prevent the system from overwriting them. **Note:** The short description for many message numbers is the same. Review the detailed description associated which each message number in the PeopleTools Message Catalog to determine which message number displays the desired message regarding the specific field.

Exclude Records

Use this section to specify specific records to be excluded from the deletion process so the data is retained. This enables you to retain data in specific tables, including audit and archived tables.

Field or Control	Description
Operator	Select the operator that defines the relationship of the rule to the record name value. Options include *Equal* or *Like*. Select *Equal* to exclude the specific record that you specify. Select *Like* to exclude records with record names like the string that you specify.
Record Name	Enter the record name to be excluded from the change or delete process. Enter the record name when the operator value is *Equal*. Use a wild character (%) with a partial record name when the operator is *Like*. **Note:** When using the *Like* operator, you should include the % wild character as a prefix or suffix within the **Record Name** field. For example, entering *UPG%* indicates that they process should not consider any records that begin with *UPG* when identifying records for deletion. Likewise, entering *%UPG* tells the process to not look at any records that end in *UPG*. Special characters are not allowed except the percentile % wild card.

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Important

Users with the *ID Delete User* role can choose whether to check for excluded records when running the Person ID Delete process from the PeopleSoft Human Resources Administer Workforce: Person ID Delete Page. If a user chooses not to check, then all person data is deleted regardless of your exclusion rules.

Including Records in the Person ID Change and Delete Processes

To include records in the Person ID Change or Delete process, use the Person ID Inclusion (ID_DEL_INCL_TABLE) component.

The following video provides an overview of person ID inclusion:

Video: Image Highlights, PeopleSoft HCM Update Image 26: Person ID Deletion and Correction

Page Used to Include Records in the Person ID Change and Delete Processes

Page Name	Definition Name	Usage
Person ID Inclusion Page	ID_DEL_INCL_TABLE	Identify records that should be included in the Person ID Change and Person ID Delete processes.

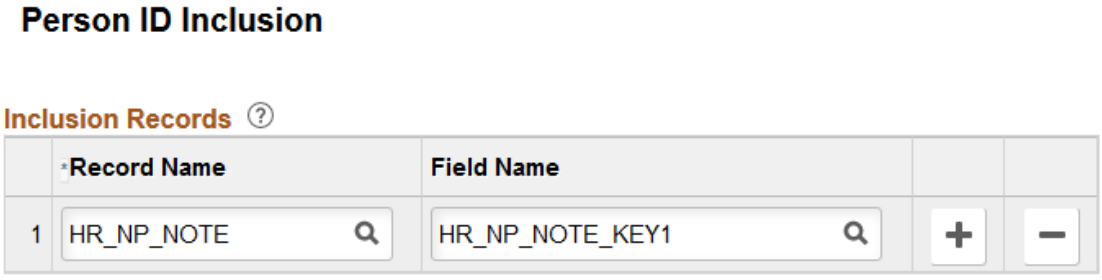
Person ID Inclusion Page

Use the Person ID Inclusion page (ID_DEL_INCL_TABLE) to identify records that should be included in the Person ID Change and Person ID Delete processes.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Person ID Inclusion**, and then **Person ID Inclusion**

This example illustrates the fields and controls on the Person ID Inclusion page.



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Use this page to identify records and fields that you want to include in the Person ID Change and Person ID Delete processes. These should be records that store the Employee ID but are not considered by these processes. You must specify both the record and field; if you indicate only the record name without the field name, nothing will be changed or deleted during the process.

Changes made to this page will impact both the change and delete processes.

> **Note**
>
> To exclude records that are already considered in the change or delete processes, see Restricting the Deletion of IDs.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Changing and Deleting IDs

Refreshing and Auditing Human Resources Data

To refresh and audit Human Resources data, use the Refresh EMPLOYEES Table component (RUN_PER099), PERSONAL_DATA Settings component (PERSON_DT_SETUP), Refresh Personal Data component (RUN_PERS_REFRESH), Update Personal Data-Future component (RUN_PERSDATA_FUT), Copy to Primary Name Type component (RUNCTL_NAMETYP_CPY), Refresh Name Display Values component (NAME_DISPLAY_RC), and the Core HR Data Integrity Audit component (RUN_PER900).

These topics discuss how to:

- Select refresh options for the Personal Data component.
- Copy fields from one name type to fields in the primary name type.
- Refresh name display values.
- Audit Human Resources data for integrity.

Pages Used to Refresh and Audit Human Resources Data

Page Name	Definition Name	Usage
Refresh EMPLOYEES Table Page	RUNCTL_ASOF_DATE	Refresh the PS_EMPLOYEES snapshot table as of the selected date.
PERSONAL_DATA Settings Page	PERSON_DT_SETUP	Select the data that you want to include in the refresh snapshot of employee personal data. The fewer options you select, the faster the system can refresh the table. You must make these selections when you install HCM. PeopleSoft only uses EmplID and Name data. Select the options you need to meet your ad hoc reporting and query needs.

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Page Name	Definition Name	Usage
Refresh Personal Data Page	PRCSRUNCNTL	Refresh the Personal Data component. The Refresh Personal Data component (PERS_REFRESH) loads the data types that you selected on the PERSONAL_DATA Settings page. This process should only be run when the PERSONAL_DATA settings are changed. This program will lock the PERSONAL_DATA table for updates during processing.
Update Personal Data-Future Page	PRCSRUNCNTL	Run this process shortly after midnight to update the Personal Data component. The process will update data with future dated information that has become current. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.
Copy to Primary Name Type Page	RUNCTL_NAMETYP_CPY	Copy fields from one name type to fields in the primary name type.
Refresh Name Display Values Page	NAME_DISPLAY_RC	Refresh all records with the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the PeopleCode definition of those fields. You can choose to update records with all name format types or just with one name format type.
Core HR Data Integrity Audit Page	HRAUDIT	Initiate the Core Human Resources Data Integrity Audit.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Refreshing Tables to Facilitate Reporting

PERSONAL_DATA Settings Page

Use the PERSONAL_DATA Settings page (PERSON_DT_SETUP) to select the data that you want to include in the refresh snapshot of employee personal data.

The fewer options you select, the faster the system can refresh the table. You must make these selections when you install HCM.

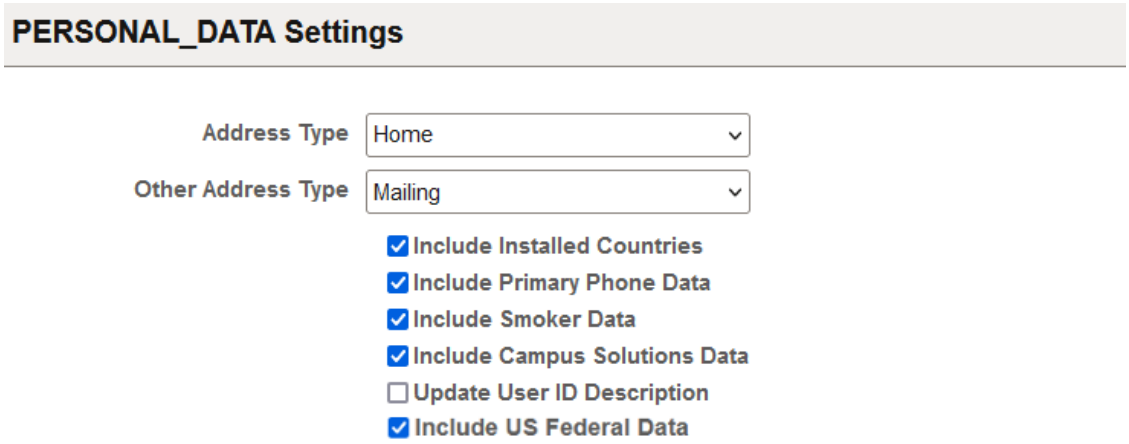
PeopleSoft only uses EmplID and Name data. Select the options you need to meet your ad hoc reporting and query needs.

Navigation:

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Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **PERSONAL_DATA Settings**, and then **PERSONAL_DATA Settings**

This example illustrates the fields and controls on the PERSONAL_DATA Settings page.



Field or Control	Description
Address Type	Select which address type to refresh.
Other Address Type	Select a secondary address type to refresh.
Include Installed Countries	Select to include the information in the country-specific group boxes for those countries that you've installed on the Installation Table - Country Specific page.
Include Primary Phone Data	Select to include the information in the PERSONAL_PHONE record.
Include Smoker Data	Select to include the information in the PERS_SMOKER record.
Include Campus Solutions Data	Select to include the information in the PERSON_SA record.
Update User ID Description	Select to update a person's user profile description in PeopleTools (**PeopleTools**, and then **User Profiles**, and then **Security**, and then **User Profiles**) from the PERSONAL_DATA table. **Note:** The description that the name field in PERSONAL_DATA uses is specified on the User Profile Types page (**PeopleTools**, and then **Security**, and then **Security Objects**, and then **User Profile Types**) for the ID Type: *EMP* (Employee). Ideally, the **Description Fieldname** value would be set to *NAME_DISPLAY*, but it can also be *NAME_FORMAL*, *NAME*, or *NAME_FORMAL_PSF*.
Include US Federal Data	(USF) Select to include the information in the PERS_DATA_USF record.

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Related Topics

- PeopleSoft Human Resources Administer Workforce: (Classic) Adding a Person
- PeopleSoft Human Resources Administer Workforce: (Fluid) Adding a Person
- PeopleSoft Human Resources Administer Workforce: Updating Personal Data

Copy to Primary Name Type Page

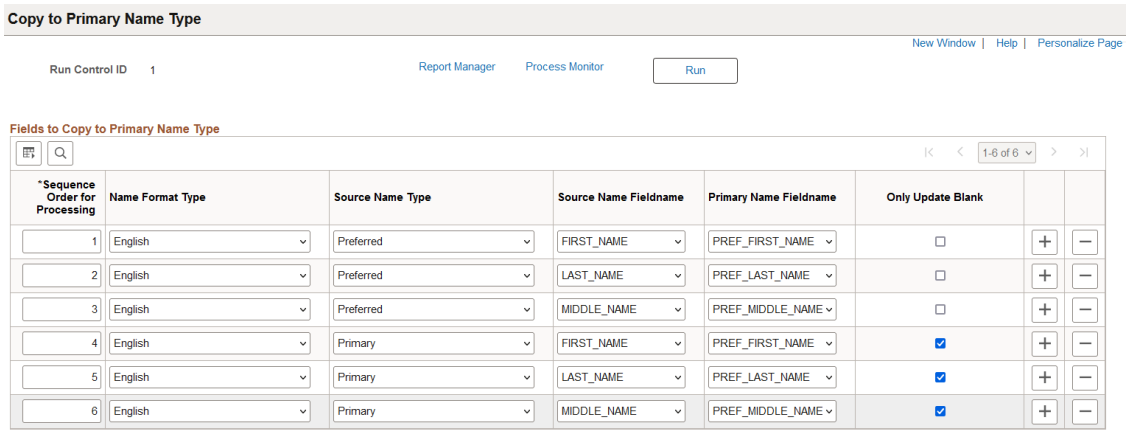
Use the Copy to Primary Name Type page (RUNCTL_NAMETYP_CPY) to copy fields from one name type to fields in the primary name type.

You can choose to update records with all name format types or just with one name format type.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Copy to Primary Name Type**, and then **Copy to Primary Name Type**

This example illustrates the fields and controls on the Refresh Name Display Values page.



Select which records and name field formats you want to update. The NAME_FLD_CPY application engine program converts the source name field from name type to the field name of the primary name type.

For example, when using preferred fields, you can copy the first and last name from the preferred name type to the preferred first and preferred last names on the primary name type for a specific name format type. The primary name type is what is used throughout most of the system. Hence, if employees put formal or preferred names in another name format type, you can now use that information on the primary type by running this process.

> **Note**
>
> The NAME_FLD_COPY (Copy to Primary Name Type) process also runs the Refresh Name Display Values process. See Refresh Name Display Values Page.

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Refresh Name Display Values Page

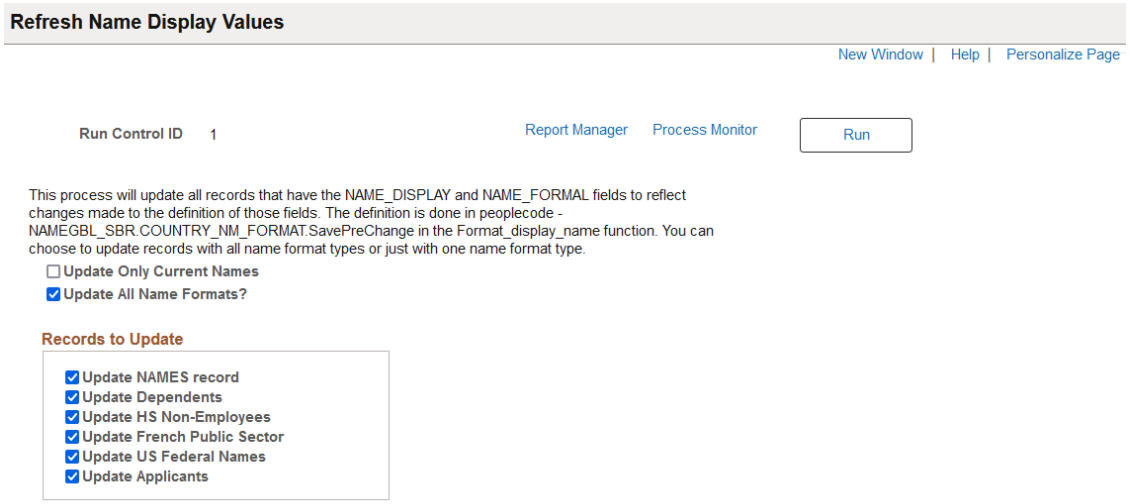
Use the Refresh Name Display Values page (NAME_DISPLAY_RC) to refresh all records with the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the PeopleCode definition of those fields.

You can choose to update records with all name format types or just with one name format type.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Refresh Name Display Values**, and then **Refresh Name Display Values**

This example illustrates the fields and controls on the Refresh Name Display Values page.



Select which records whose name fields format you want to update.

> **Note**
>
> You should run this process whenever you make changes to the additional name setup tables. See Setting Up Additional Name Information.

Core HR Data Integrity Audit Page

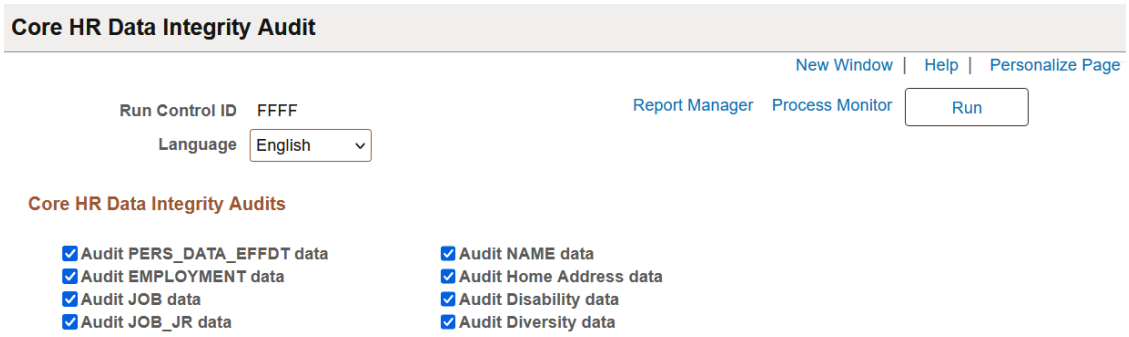
Use the Core HR Data Integrity Audit page (HRAUDIT) to initiate the Core Human Resources Data Integrity Audit.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Core HR Data Integrity Audit**, and then **Core HR Data Integrity Audit**

This example illustrates the fields and controls on the Core HR Data Integrity Audit page.

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Select the HR tables you want to audit for integrity.

Managing Employee Photos

To manage employee photos, use the Resize Employee Photo (EMPL_PHOTO_RESIZE) component.

The employee upload functionality takes all image files present in a directory to upload into PeopleSoft application. This batch process also resizes new and existing photos.

Video: Image Highlights, PeopleSoft HCM Update Image 20: Photo Mass Upload

This topic discusses how to resize and update mass employee photos.

Pages Used to Manage Employee Photos

Page Name	Definition Name	Usage
Resize Employee Photos Page	EMPL_PHOTO_RESIZE	Upload and resize employee photos in bulk.

Resize Employee Photos Page

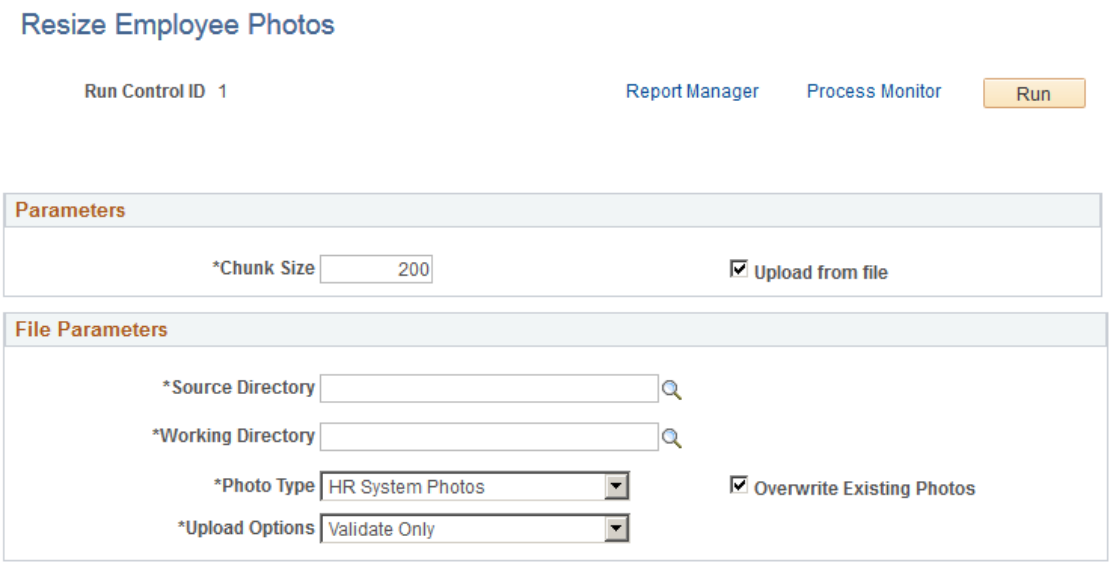
Use the Resize Employee Photos page (EMPL_PHOTO_RESIZE) to upload and resize employee photos in bulk.

Navigation:

Set Up HCM, and then **System Administration**, and then **Database Processes**, and then **Resize Employee Photos**, and then **Resize Employee Photos**

This example illustrates the fields and controls on the Resize Employee Photos page.

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Parameters

Field or Control	Description
Chunk Size	Enter a value to determine the maximum number of photos to be resized and uploaded in iteration. The batch process iterates multiple times until all photos are resized and uploaded.
Upload From File	Select to indicate that the photos to be resized are to be uploaded from a file. Deselect the check box to have the batch process only resize photos stored in the PS_EMPL_PHOTO and PS_HRCD_USER_PHOTO tables.

File Parameters

This section is available when you select the **Upload from file** check box to indicate you are uploading new employee photos.

When a file upload size is set on the Installation Table - HCM Options Page, this section will also display text identifying the maximum photo upload size and suggest you review the size of the photos before running the process. Larger sizes than the recommended size may lead to a slower processing time.

Field or Control	Description
Source Directory	Specify the URL ID containing the absolute path of the source directory containing the image files that are to be resized and uploaded. **Important:** All image files should be in JPEG format and use the name format <EMPLID>.jpg. For example, *KU0007.jpg*. **Note:** The URL should use the format *file:///<absolutepath>*. The URL string path cannot exceed 30 characters in length, including the prefix file:///.

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Field or Control	Description
Working Directory	Specify the URL ID containing the absolute path of the working directory which would be used as an intermediate folder for the image files that are to be resized and uploaded. **Note:** The URL should use the format *file:///<absolutepath>*. The URL string path cannot exceed 30 characters in length, including the prefix file:///.
Photo Type	Select the type of photo present in the source directory. Options are: • *HR System Photos*: These photos are maintained by HR administrator and stored in the PS_EMPL_PHOTO table. • *User Photos*: These photos are managed by the user and are stored in the PS_HRCD_USER_PHOTO table.
Overwrite Existing Photos	Select this check box to indicate that existing employee photos present in the system should be overwritten by the source images. Deselect this option to ignore source image files of employees who already have photos in the system.
Upload Options	Select the upload option for the batch process and specify what actions the batch process needs to perform. Options include: • *Validate Only* – This option only validates data and does not resize or upload photos. • *Validate and Upload* – This option validates and subsequently resizes and upload photos.

When you run the process, the application engine checks to ensure:

- There are image files present in the source directory.
- There are no duplicate file names.
- The employee ID exists in the system.
- If **Overwrite Existing Photos** is deselected, image files of employees who already have photos in the system for the Photo Type selected (*HR System Photos* or *User Photos*), are not processed.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Employee Photo Page
- PeopleSoft Human Resources Administer Workforce: Org Chart Viewer - Update Photo Page
- PeopleSoft eProfile: Select Photo Page

Using the Tables Accessed and Updated Report

This topic describes the Tables Accessed and Updated report.

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Page Used to Run the Table Access and Updated Report

Page Name	Definition Name	Usage
Using the Tables Accessed and Updated Report	TAU_RUN_CONTROL	Run the Tables Accessed and Updated report.

Understanding the Tables Accessed and Updated Reporting Utility

The Tables Accessed and Updated report:

- Analyzes the following PeopleSoft applications:
  - SQR reports.
  - COBOL programs.
  - Application Engine programs.
  - PS Query views.
- Reports the record names referenced by the SQL statements within the applications.
- Reports the way in which those records were accessed (for example, Select, Update, or Delete.)

Use this information to:

- Understand a program's functionality and how it manages your data.
- Assess the impact of proposed customizations.
- Determine the underlying database privileges require to run a program.
- Identify every batch process that uses or alters a specific record.

Troubleshooting the Tables Accessed and Updated Report

Because of the flexibility of the programming environments and the rich set of meta-SQL available in PeopleTools, the table list created by the Tables Accessed and Updated report may sometimes be incomplete. The list will be incomplete when:

- The SQR allows the use of dynamic substitution tables.

  Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of SQR.
- The SQR incorporates the construction of SQL clauses within string variables that can then be used in SQL statements and resolved by the SQR at runtime.

  The Tables Accessed and Updated report can't detect this style of coding, however there aren't many table references found within these kinds of clauses.
- The SQR references libraries through syntax that includes (#INCLUDE) SQC files.

  If an included module is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.
- The COBOL programs reference libraries through syntax that calls (CALL ... USING) routines in other modules.

  If the module called is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.

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- The Application Engine program contains the meta-SQL phrase %Execute() with platform-specific procedural logic (such as Microsoft SQL Server "Transact-SQL" or Oracle "SQL-Plus").

  The Tables Accessed and Updated report reports such usage as unanalyzed.

- The Application Engine program uses a PeopleCode step.

  The Tables Accessed and Updated reports any use of PeopleCode as unanalyzed, whether or not it contains SQL statements.

- The Application Engine program contains forms of meta-SQL that contains dynamic object references.

  Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of meta-SQL.

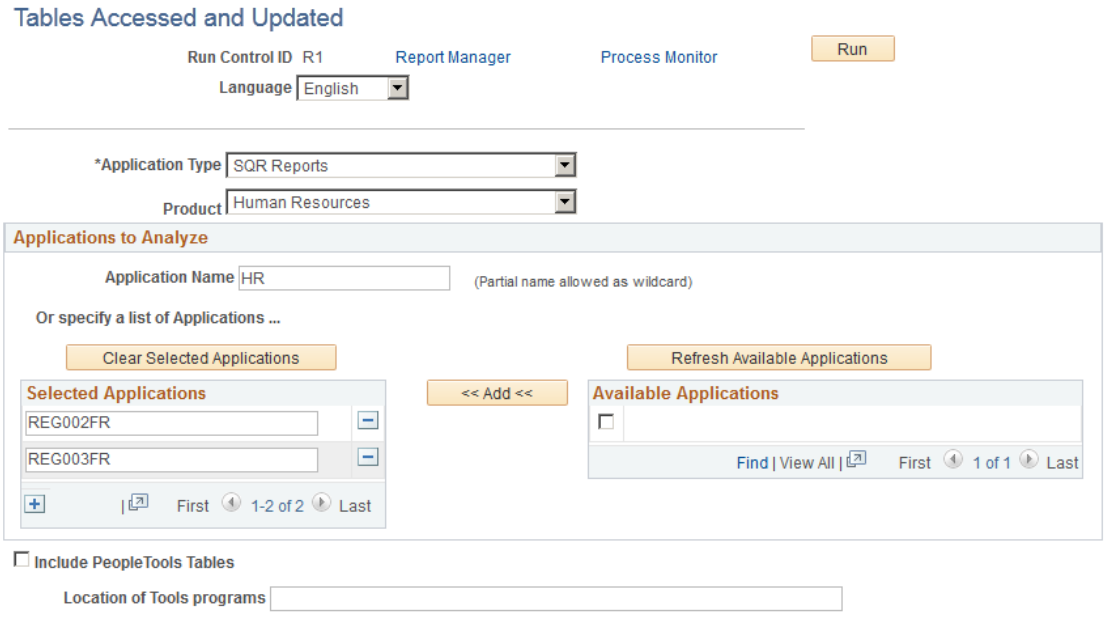
Tables Accessed and Updated Page

Use the Tables Accessed and Updated page (TAU_RUN_CONTROL) to run the Tables Accessed and Updated report.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Tables Accessed and Updated**, and then **Tables Accessed and Updated**

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



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Field or Control	Description
Application Type	Select the type of application to analyze in the report. The options are: • *AppEngine Programs* • *SQR Reports* • *COBOL programs* • *Queries*
Product	To restrict the analysis to applications in on product, select it here.
Application Name	Enter part or all of the name of the application or applications you want to analyze. Enter a *?* to report on all applications in the product. **Note:** Depending on the application type, there could be over a thousand applications in a product. You can run the report using just the information you enter here or you can use this value as search criteria to create a list of applications using the Available Applications and Selected Applications group boxes. For example, when you select *SQR Reports*, *Human Resources*, and enter *R* in the Application Name field and run the utility, the report will analyze the REG001FR, REG002FR, and REG003FR reports. To refine the search, click the Refresh Available Applications button and select which of the three reports to analyze and add them to the Selected Applications list.
Refresh Available Applications and **Available Applications**	Click Refresh Available Applications to populate the Available Applications group box with applications that match the search criteria you entered in the Application Name field. Select the applications you want to analyze. **Note:** A small number of applications are not associated with normal run control pages (for example, one-time conversion routines or system setup utilities used during installation) and the system will not display them in the Available Applications list. You can enter these applications in the Selected Applications list using the insert button and entering the application's name.
<<**Add**<<	Click to add the applications you selected in the Available Applications list to the Selected Applications list. Once you've added items to the Selected Applications list, you can enter new search criteria in the Application Name field and refresh the Available Applications list.

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Field or Control	Description
Clear Selected Applications and **Selected Applications**	The report will analyze all the applications included in the Selected Applications list. You can add or remove applications using the insert and delete icons. Click the **Clear Selected Applications** button to deselect the list of applications you've selected for analysis.
Include PeopleTools Tables	Select to include PeopleTools tables in your analysis. PeopleTools tables define all PeopleSoft objects and manage system behavior, and include this such as related language control, currency conversions, and Process Scheduler activity.
Location of Source Code	If you are analyzing COBOL programs, enter the path to the COBOL source code's location on the server. **Note:** The system only makes this field available when you select to analyze a COBOL program.
Location of Tools programs	If you are analyzing SQR programs and are *excluding* PeopleTools tables, enter the path to the PeopleTools SQR components' location on the server. **Note:** The system only makes this field available when you select to analyze SQR reports.

Testing Component Interfaces Using the Invoke Core CIs Utility

This topic describes how to test component interfaces.

Pages Used to Test Component Interfaces Using the Invoke Core CIs Utility

Page Name	Definition Name	Usage
Invoke Core CIs Page	RUNCTL_CCI	Launch a component interface with sample data to test if it performs in the manner in which you want it to.
Error Log Page	RUNCTL_CCI2	Review any errors after invoking a component interface.

Invoke Core CIs Page

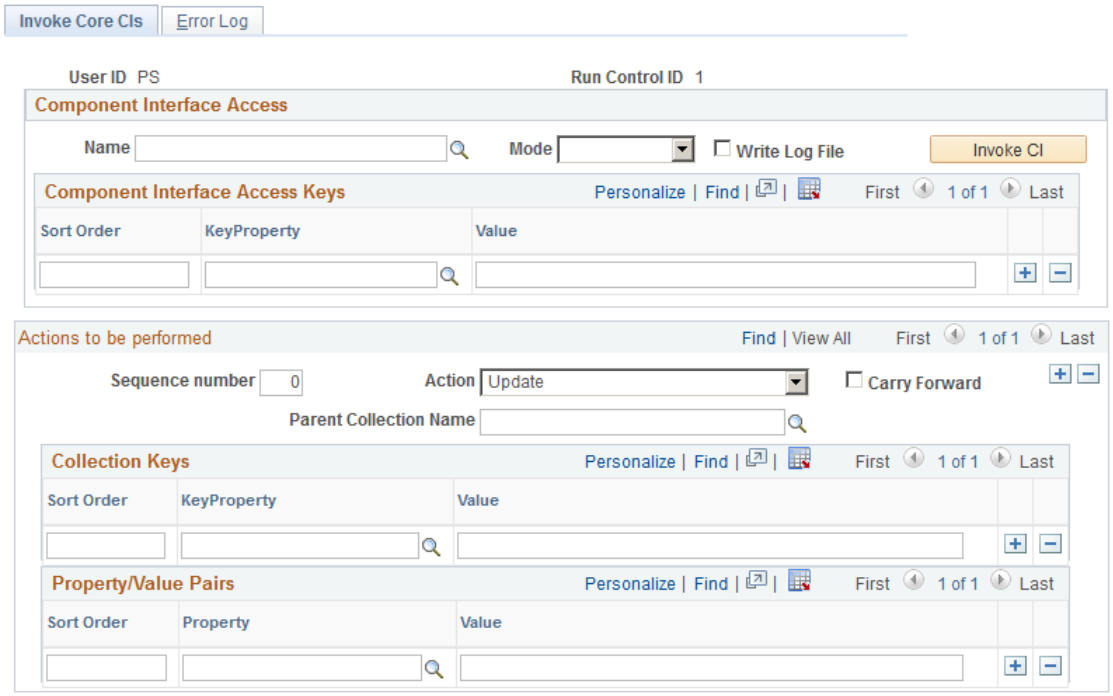
Use the Invoke Core CIs page (RUNCTL_CCI) to launch a component interface with sample data to test if it performs in the manner in which you want it to.

Navigation:

Set Up HCM, and then **System Administration**, and then **Utilities**, and then **Invoke Core CIs**, and then **Invoke Core CIs**

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



Component Interface Access

Field or Control	Description
Name	Select the name of the component interface you want to test.
Mode	Select one of the following access modes: • *Create*: Select to create a new row of data in the component with the key values that you enter in the Component Interface Access Keys grid. • *Find*: Select to find a list of data rows that match the search criteria you enter in the Component Interface Access Keys grid. • *Get*: Select to find a single row of data that match the search criteria you enter in the Component Interface Access Keys grid.
Write Log File	Select to create a log file of the component interface test.
Invoke CI	When you've entered all of the necessary information, click to invoke the CI and test it using the information entered on this page.

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Field or Control	Description
Sort Order, **KeyProperty**, and **Value**	The component interface's key properties are the search keys of the underlying component's search record. Select with key fields to use in the search in the KeyProperty field and enter the value of the field to use in the search in the Value field. If you are searching by more than one key field, indicate the order in which the system should sort the results. If you are testing the CI using the Create action mode, use all the key properties.

Actions to be Performed

Field or Control	Description
Sequence Number	Indicate the order in which the system should process this action using the component interface.
Action	Select the action to invoke using the CI: • *Delete*: Select to delete data rows that match the values you enter in this group box. • *Get*: Select to retrieve data rows that match the values you enter in this group box. • *Insert*: Select to insert a new data row with the values you enter in this group box. For example, if the current row is dated November 12, 2005 and you want to enter a row effective January 1, 2004 while still maintaining the November row as the current row, select this option. • *Invoke Method*: Select to run the method for the CI. A method, for instance, can process PeopleCode. For example, in Salary Planning, the calculation of the salary increase of each employee can be performed on-line or using a batch program. The batch program will process the method CI_SALARY_PLAN_GRP.Methods.SalPlanGrp . • *Update*: Inserts a new, effective dated row in effective-dated components or updates the data in components that are not effective dated. • *Update no Insert*: Select to update the existing row of data.
Carry Forward	Select this option to update any rows in the component that are more current than the row you are inserting using the CI.
Parent Collection Name	Select the collection (which corresponds to a record) in which you want to update data.

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Field or Control	Description
Sort Order, **KeyProperty**, and **Value**	(Collection Keys) Select the key field or fields for the scroll and enter the value of the row upon which you want to perform the action.
Sort Order, **Property**, and **Value**	(Property/Values Pairs) Select the fields in the collection and the field values that you want to use in the action.

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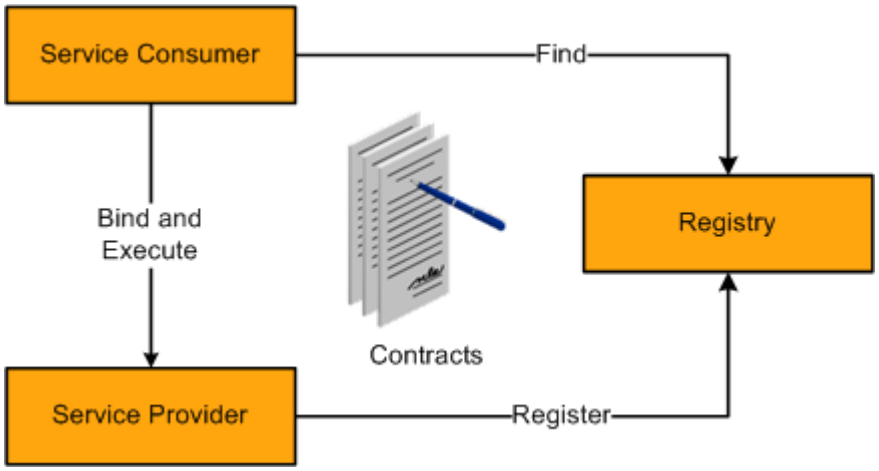
28

Registering Interfaces

Understanding the HCM Interface Registry

The HCM interface registry holds all the interface specifications for available services in the Service Oriented Architecture (SOA). It stores contracts from service providers and provides those contracts to interested service consumers.

The service provider registers the interface, the consumer locates the interface in the registry and uses the information to bind and run the contract between the consumer and the provider, as shown in this diagram:



The service consumer is an application, service, or some other type of software module that requires a service. It is the entity that initiates the location of the service in the registry, binding to the service over a transport, and running the service function. The service consumer runs the service by sending it a request formatted according to the contract.

The service provider is the service, the network-addressable entity that accepts and runs the requests from consumers. It can be a mainframe system, a component, or some other type of software system that runs the service request. The service provider publishes its contract in the registry for access by service consumers.

To set up and use an interface registry:

1. Set up the interface contract and register the interface using the Registration Wizard (**Set Up HCM**, and then **System Administration**, and then **HCM Registry**, and then **Registry Wizard**).
2. Implement the interface in the providing application.
3. Set up the consuming application to invoke registered interfaces.

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Setting Up Interface Contracts

An interface contract specifies the way a consumer of a service will interact with the provider of the service, including the format of the request and response from the service. The HCM registry is populated with the existing interface contracts within HCM. To add new interfaces to the registry, you must first define the contract between the services.

To define an agreement between services, follow these steps:

1. Determine the interface details (such as signature, exceptions, and warnings).
2. Register the interface under the provider object identifier.
3. Set the interface status to *Active.*

> **Note**
>
> Register interfaces using the HCM registry's Registration Wizard.

Interfaces fall into one of the following categories:

- Services
  - Synchronous request/response (services)

    Services interfaces are procedural invocations and can be local and remote.
  - Asynchronous publish/subscribe (events)

    Events can be notifications (outbound) or consumption (inbound) and are based on messaging and integration points.
- sqlViews (views)

  Views are read only and are SQL-based.
- Types

  Types represent the complex data types used in service invocations. The following types are supported for service invocations in API:
  - Primitives (native PeopleCode data types), such as string, date, number, boolean, hexbinary, and arrays.
  - Complex types, as defined in the registry or arrays of any complex type.

  > **Note**
  >
  > While you can use all primitive types in service invocations natively, all complex types must be explicitly defined and registered in the registry.
- Exceptions

  Exceptions are fatal errors that can occur during the service run and require special handling by the PeopleCode program. Service providers must identify exceptions that they believe can occur so that the consumer code can manage the exception.

  Define exceptions and register them in the interface registry.

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Managing the HCM Interface Registry

To mange the HCM interface registry entries, use the Service Registry component (HMCR_IFC_REGISTRY).

These topics discuss how to manage the HCM Interface Registry.

Pages Used to Manage the HCM Interface Registry

Page Name	Definition Name	Usage
Service Registry Page	HMCR_IFC_REGISTRY	Review the HCM registry and modify existing entries.
Folder Actions - <Registry Folder Label> Page	HMCR_IFC_FLDR_ACT	Generate and audit the WSDL for a selected interface folder.
Audit Results - Audit <Registry Folder Label> Page	HMCR_IFC_AUD_RSLT	Review the results of a registry folder audit.
HMCR Type Viewer Page	HMCR_WSDL_VIEWER HMCR_IVW_VIEWER HMCR_TYPE_VIEWER	Review registry and interface details about a selected interface.
HMCR Raw WSDL Viewer <Registry Entry Name> Page	HMCR_WSDL_RAW_SEC	View WSDL code for a service registry entry, or view XSD code for a type or exception registry entry.

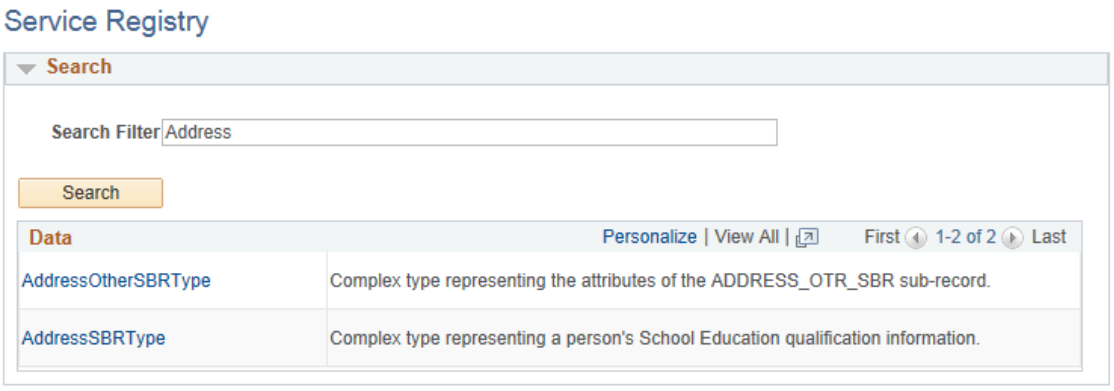
Service Registry Page

Use the Service Registry page (HMCR_IFC_REGISTRY) to review the HCM registry and modify existing entries.

Navigation:

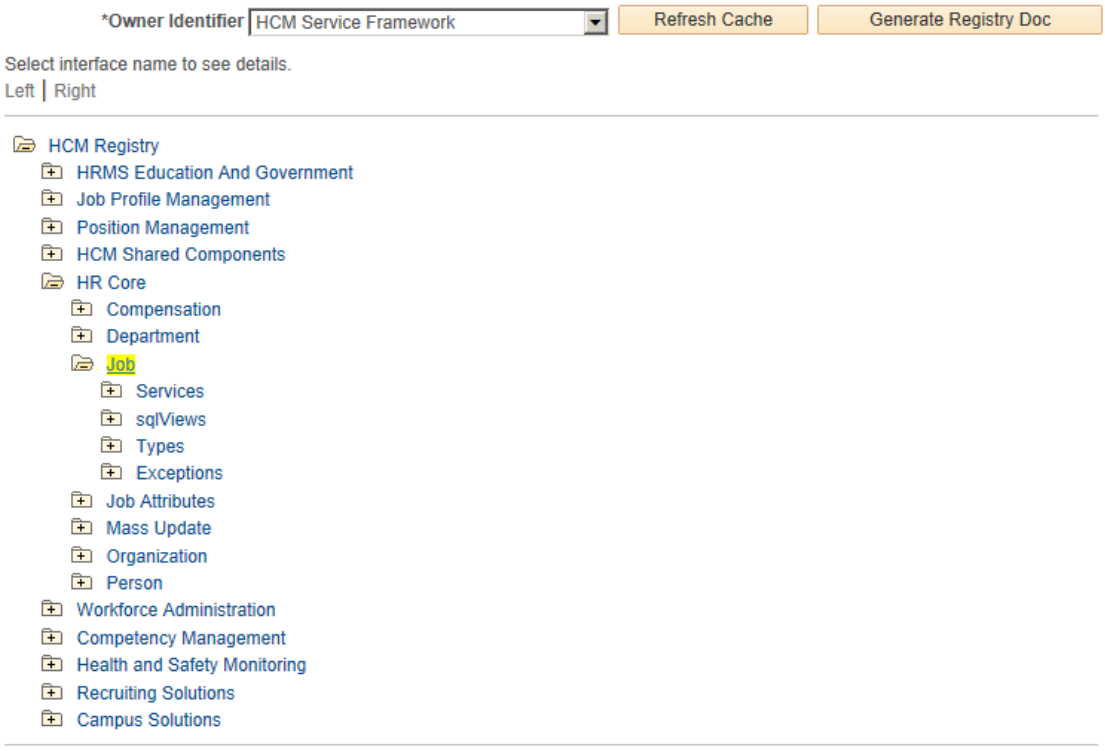
Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Service Registry**, and then **Service Registry**

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



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



The registry lists all the content owners and their interfaces in a tree format. Each tree leaf represents a registered interface. Registered interfaces are grouped by interface folders. Click a registered interface to review interface information on the Details page.

Field or Control	Description
Owner Identifier	Select an owner identifier. The registry displays all interfaces (public and private) defined for the selected content owner in addition to all public interfaces defined by owners other than the selected owner.
Refresh Cache	Click this button to manually refresh the cache where services, types, exceptions, and SQL views are stored whenever you make a change to the registry. You must refresh the cache when a definition is modified, added, or deleted. You must also refresh the cache when an external cache has to be imported.

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Field or Control	Description
Generate Registry Doc	Click this button to generate RegistryDoc for the selected HCM service registry. The system generates RegistryDoc in HTML and provides the View RegistryDOC link for you to access the data. The RegistryDoc enables you to view or introspect the registry without having to open the registry, thus offering a quicker view into the registry. **Note:** RegistryDoc generation relies on configuration of PeopleTools Process Scheduler and report nodes. You should set the directory that acts as the report repository in a shared mode.
View RegistryDoc	Click this link to view RegistryDoc that you have generated. The system opens a new browser window, which displays the registry API content in HTML format.

Searching the Registry

Use the Search capability to look up a registry when:

- You do not know the exact name for or the navigation to the service, sqlView, type, or exception.
- You want to search for the descriptions for a specific word or pattern of a word.

Field or Control	Description
Search Filter	To search registry entries for a service, sqlView, type, or exception, enter a search string in this field. An SQL-based search looks for word pattern that you enter.
Search	Click this button to retrieve the registry entries that match your search criteria.
Data	Click the link to access the details of the registry.

Folder Actions - <Registry Folder Label> Page

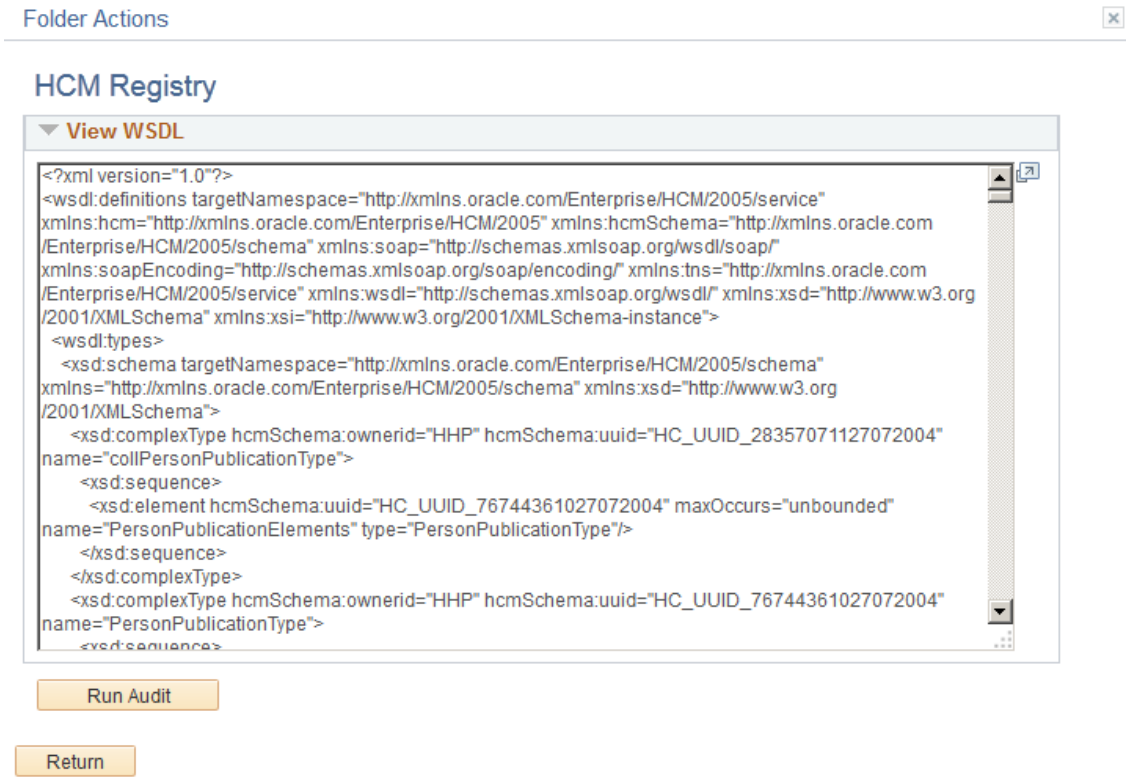
Use the Folder Actions - <Registry Folder Label> page (HMCR_IFC_FLDR_ACT) to generate and audit the WSDL for a selected interface folder.

Navigation:

Click an interface folder on the Service Registry page.

This example illustrates the fields and controls on the Folder Actions - <Registry Folder Label> page showing the HR Core interface folder data. You can find definitions for the fields and controls later on this page.

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Use the **View WSDL** group box to review the WSDL that the system generated for the selected registry folder. Click the **Run Audit** button to run an audit on the registry folder. The system displays the Audit Results - Audit <Registry Folder Label> page for you to review the results of the registry folder audit.

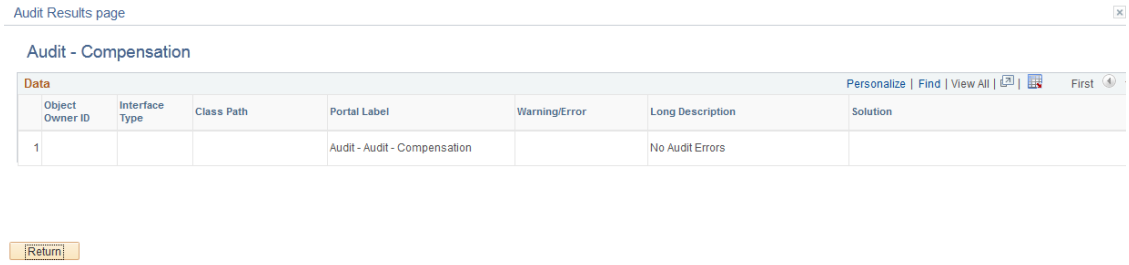
Audit Results - Audit <Registry Folder Label> Page

Use the Audit Results - Audit <Registry Folder Label> page (HMCR_IFC_AUD_RSLT) to review the results of a registry folder audit.

Navigation:

Click the **Run Audit** button on the Folder Actions - <Registry Folder Label> page.

This example illustrates the fields and controls on the Audit Results - Audit <Registry Folder Label> page. You can find definitions for the fields and controls later on this page.



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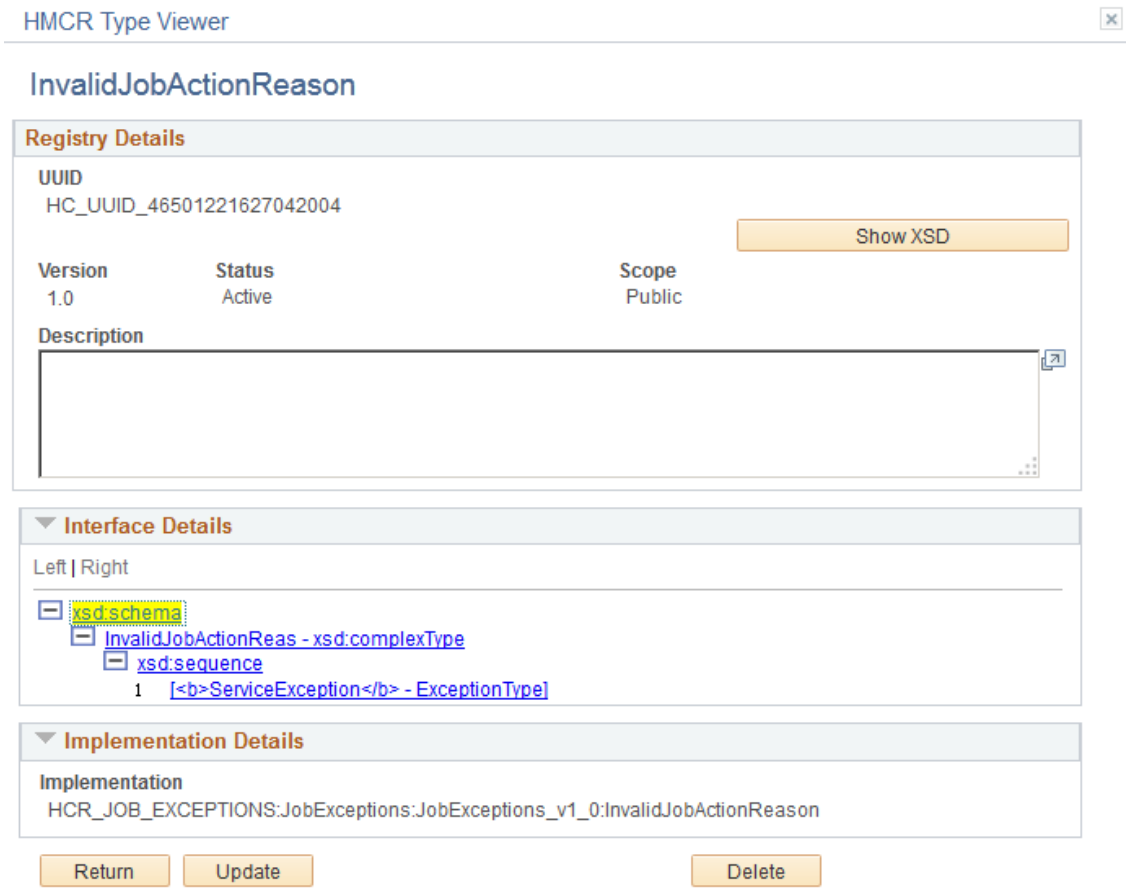
HMCR Type Viewer Page

Use the HMCR Type Viewer page (HMCR_WSDL_VIEWER) to review registry and interface details about a selected interface.

Navigation:

Click a link under the **sqlViews, Types,** or **Exceptions** interface folders on the Folder Actions - <Registry Folder Label> page.

This example illustrates the fields and controls on the Interface Registry - HMCR Type Viewer page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> The Interface Registry - HMCR Type Viewer page is slightly different for each type of interface (services, sqlViews, types, and exceptions).

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Registry Details

Field or Control	Description
IUD	The IUD is the interface's unique identifier for a service within the registry. The system generates this identifier.
Locate By	The system automatically displays this value where applicable.
Version	Each registry entry has a version type. You can have multiple versions of an entry when you require multiple version of an interface.
Status	An interface can have one of the following statuses within the registry: • *Requested* The interface has been requested by a party but has not been implemented. • *In Work* The interface is currently being defined. • *Active* The interface is ready for use. • *Deprecated* The interface has been replaced by a more current version, but is still supported. • *Retired* The selected version of the interface has been retired. **Note:** The status of an interface is specific to the entry version.
Scope	This field indicates who can reference this version of the interface: • If the interface is *Public*, it can be used by any application. • If the interface is *Private*, it can only be used within the provider module.
Generate Consumer Code	Click to generate the consumer stub code for this registry entry. Use this code to implement the service. See Implementing Registered Interfaces.
Generate Provider Code	Click to generate the provider stub code for this registry entry. Use this code to implement the service. See Implementing Registered Interfaces.
Show WSDL	Click this button to generate Web Services Definition Language (WSDL) code for the service registry entry. WSDL code provides you with all the details about the service that is needed for consuming a service. The system displays the <Registry Entry Name> page where you can view the WSDL code. **Note:** Definitions for sqlViews, types, and exceptions do not have WSDL viewing capability.

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Field or Control	Description
Show XSD	Click this button to generate XSD code for a type or exception registry entry. XSD code contains the definition of a particular type, which is information that is necessary for consuming complex types. The system displays the <Registry Entry Name> page where you can view the XSD code. **Note:** Definitions for services and sqlViews do not have XSD viewing capability.
Run Audit	Click this button to run an audit of the selected registry folder. Audits ensure that the registry is clean. They also enable you to monitor discrepancies between implementation and contracts. The system displays the Audit - <Registry Folder Label> page, where you can review the results of the audit.

Interface Details

Interfaces are defined using an XSD schema. The schema for each interface type is stored in the registry. The system generates the schema during registration.

> **Note**
>
> The schema defines the details of sqlView interfaces, not the database view that implements the view interface. The database view must match the properties defined in the schema.

Service interface types have operations called DoServices. A DoService has one or more input, output, and outfault element and each element is defined by either one or more simple or complex type.

Exception Details

Review a service interface's exception details and the associated messages.

Implementation Details

In the Implementation Details group box, review the fully qualified application class path that implements class for this type or exception. The class path includes a branch indicating the version of this type. The version attribute of the registry entry must match the version in the class path of the type class.

> **Note**
>
> For sqlView interfaces, the Implementation Details box displays the database view implementing the interface view.

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> **Note**
>
> All exceptions must extend the class *baseException,* which extends the PeopleTools built-in exception class.

HMCR Raw WSDL Viewer <Registry Entry Name> Page

Use the HMCR Raw WSDL Viewer <Registry Entry Name> page (HMCR_WSDL_RAW_SEC) to view WSDL code for a service registry entry, or view XSD code for a type or exception registry entry.

Navigation:

Click an interface for a service on the Folder Actions - <Registry Folder Label> page, and then click the **Show WSDL** button, or click an interface for a type or exception, and then click on the **Show XSD** button from the WSDL Detail Information page.

This example illustrates the fields and controls on the HMCR Raw WSDL Viewer <Registry Entry Name> page. You can find definitions for the fields and controls later on this page.



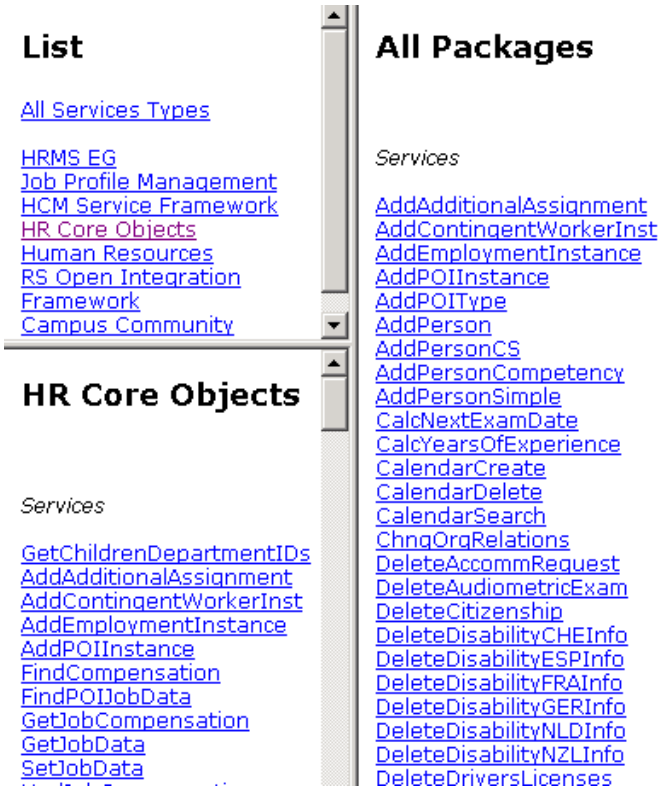
Viewing RegistryDoc

To view RegistryDoc, click the **Generate Registry Doc** button on the Service Registry page. The system generates the RegistryDoc and displays the View RegistryDoc link.

Click the **View RegistryDoc** link. The system opens a new browser window, which displays the registry API content in HTML format.

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



The page contains three frames. The upper left frame lists the root packages within the RegistryDoc. Click a link for a root package in the upper left frame to view for a list of all of the services, sqlViews, types, and exceptions that are associated with the selected root package. The system displays the details of the selected root package within the lower left frame. The right frame displays the services, sqlViews, types, and exceptions for all root packages.

Click a link in the lower left frame or the right frame to view service, sqlView, type, or exception details.

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

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AddAdditionalAssignment 1.0

View WSDL 1.1

Service description

This service is used to create an additional assignment for an existing person and existing organizational instance.

Service usage

This service accepts an OrganizationalAssignmentType as input. Also, there is a boolean flag, IgnoreBlanks, which depending on how it is set the service will act accordingly. If set to True then any blank values in the OrganizationalAssignmentType are ignored. If set to False, then any blank values will be treated as an attempt to blank out the existing value. This service returns the updated OrganizationalAssignmentType as an output.

Service properties

UUID	HC_UUID_25856401612122005	**Owner Id**	HR Core Objects
Path	HR Core.Job.Services.AddAdditionalAssignment		

Service attributes

Scope	Public	**Status**	In Work
Deployment	Local	**Deployment Node**	LOCAL_NODE
Implementation Path	HCR_JOB_SERVICES:Job:AddAdditionalAssignment_v1_0:implAddAdditionalAssignment		
Proxy Path			

Interface operation details

Service Operation Name	DoService
Input Parameters	
Name	**Type**
inIgnoreBlanks	boolean
inOrgAssignmentType	OrgAssignmentType
Output Parameters	
Name	**Type**
outOrgAssignmentType	OrgAssignmentType

Method Signature

DoService(&inIgnoreBlanks As boolean, &inOrgAssignmentType As OrgAssignmentType, &outOrgAssignmentType As OrgAssignmentType)

From a service details page, click on the View WSDL link to view WSDL code for the selected service.

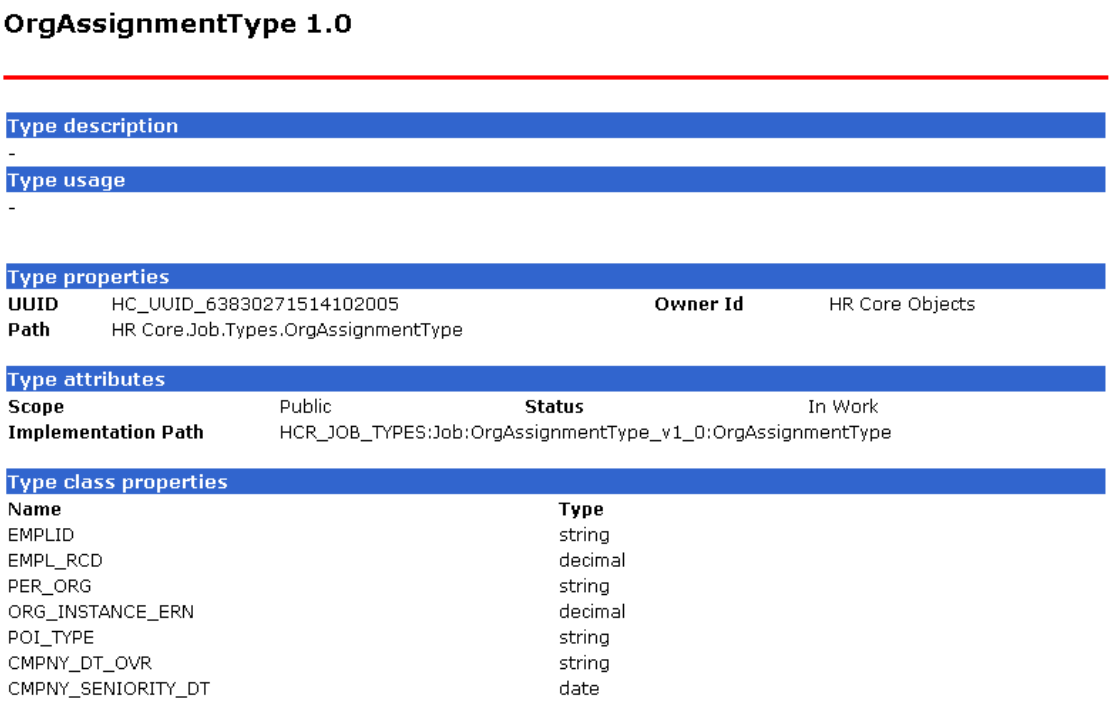
This example illustrates the fields and controls on the Viewing WSDL code for a selected service. You can find definitions for the fields and controls later on this page.

```
<?xml version="1.0" ?>
- <wsdl:definitions targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
    xmlns:hcm="http://xmlns.oracle.com/Enterprise/HCM/2005"
    xmlns:hcmSchema="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
    xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
    xmlns:soapEncoding="http://schemas.xmlsoap.org/soap/encoding/"
    xmlns:tns="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
    xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
    xmlns:xsd="http://www.w3.org/2001/XMLSchema"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  - <wsdl:types>
    - <xsd:schema targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
        xmlns="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
        xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      - <xsd:complexType hcmSchema:ownerid="HCR"
          hcmSchema:uuid="HC_UUID_63830271514102005" name="OrgAssignmentType">
        - <xsd:sequence>
            <xsd:element minOccurs="1" name="EMPLID" type="xsd:string" />
            <xsd:element minOccurs="1" name="EMPL_RCD" type="xsd:decimal" />
            <xsd:element minOccurs="1" name="PER_ORG" type="xsd:string" />
            <xsd:element minOccurs="1" name="ORG_INSTANCE_ERN" type="xsd:decimal" />
            <xsd:element name="POI_TYPE" type="xsd:string" />
            <xsd:element name="CMPNY_DT_OVR" type="xsd:string" />
            <xsd:element name="CMPNY_SENIORITY_DT" type="xsd:date" />
            <xsd:element name="SERVICE_DT_OVR" type="xsd:string" />
            <xsd:element name="SERVICE_DT" type="xsd:date" />
```


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If a service or type refers to another complex type or exception, click on the type link on the details page to view type or exception details.

This example illustrates the fields and controls on the Viewing type details for a selected service. You can find definitions for the fields and controls later on this page.



OrgAssignmentType 1.0

Type description

-

Type usage

-

Type properties

UUID	HC_UUID_63830271514102005	**Owner Id**	HR Core Objects
Path	HR Core.Job.Types.OrgAssignmentType		

Type attributes

Scope	Public	**Status**	In Work
Implementation Path	HCR_JOB_TYPES:Job:OrgAssignmentType_v1_0:OrgAssignmentType		

Type class properties

Name	Type
EMPLID	string
EMPL_RCD	decimal
PER_ORG	string
ORG_INSTANCE_ERN	decimal
POI_TYPE	string
CMPNY_DT_OVR	string
CMPNY_SENIORITY_DT	date

Registering New Interfaces

To register new interfaces, use the Registration Wizard component (HMCR_WZ_REGSRV).

These topics discuss how to register new interfaces.

Pages Used to Register New Interfaces Through the Registration Wizard

Page Name	Definition Name	Usage
Registry Information Page	HMCR_WZ_STEP1	Enter information about a new interface.
Interface Specification Page	HMCR_WZ_STEP2	Enter details about the new interface.
Implementation Page	HMCR_WZ_STEP3	Complete the registration of the new interface by implementing the interface.

Registry Information Page

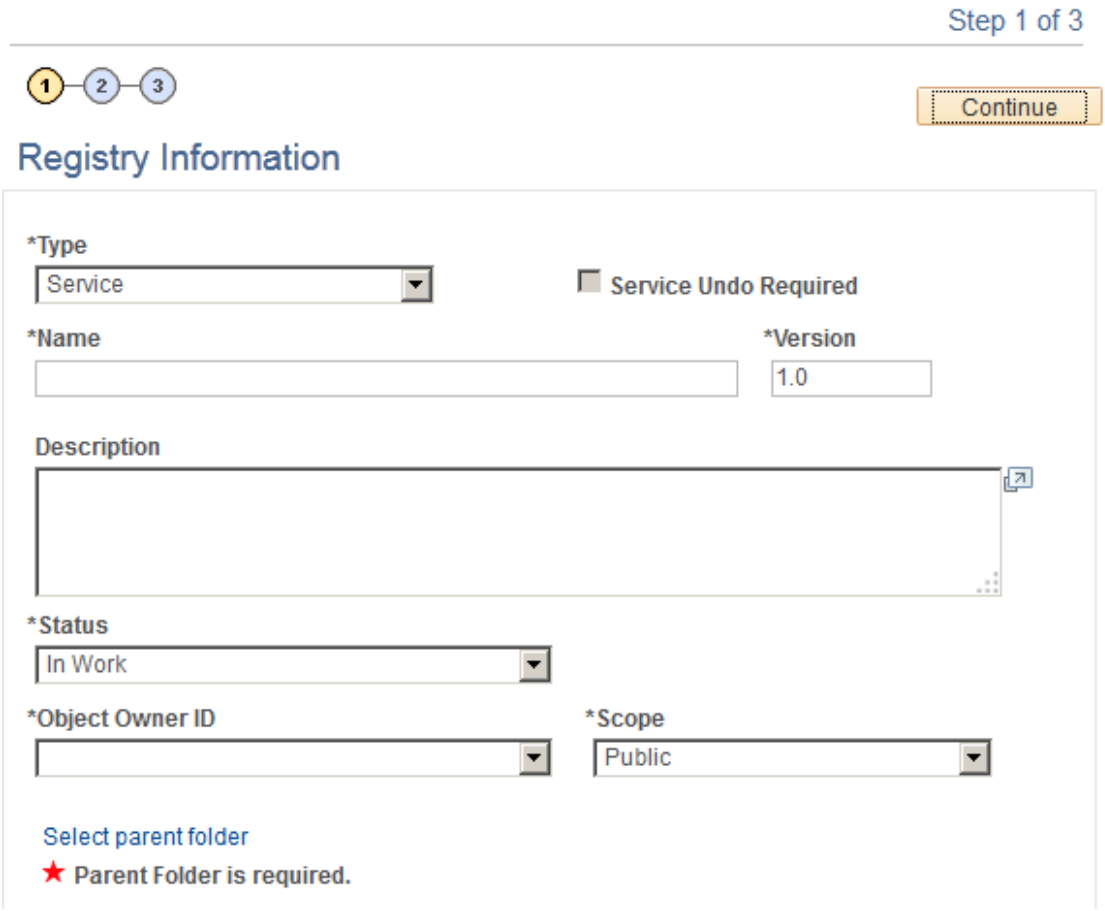
Use the Registry Information page (HMCR_WZ_STEP1) to enter information about a new interface.

Navigation:

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Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Registration Wizard**, and then **Registry Information**

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



Field or Control	Description
Type	Select the interface type. **Note:** The pages in this component and the information you enter can vary depending on the type of interface you select here.

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Field or Control	Description
Name	Enter a meaningful name for the interface using the following guidelines: • One word (no spaces). • Mixed case. • In one of the following formats, depending on the interface type: In the format, <Noun>Exception, <Noun>Service, or <Noun>sqlView, depending on the type of interface you are registering. – For Type interfaces: <Noun>Type. – For Service interfaces: <Verb><Noun>. – For Exception interfaces: <Noun>Exception. – For Interface Views: <Noun><Noun>. **Note:** Users see the name you enter here on the registry tree so make sure that the name is clear and meaningful.
Version	Indicate the interface version using the format n.n. You can have multiple active versions of an interface.
Status	Select the status of this version of the interface: • *Requested* The interface has been requested by a party but has not been implemented. • *In Work* The interface is currently being defined. • *Active* The interface is ready for use. • *Deprecated* The interface has been replaced by a more current version, but is still supported. • *Retired* The selected version of the interface has been retired.
Object owner identifier	Select the interface provider.
Scope	Indicate if the interface is *Public* (available to everyone) or *Private* (available only to the provider application).
Select parent folder	Click this link to access the registry folder structure and select the folder within which the new interface will reside. Group interfaces by feature.

Interface Specification Page

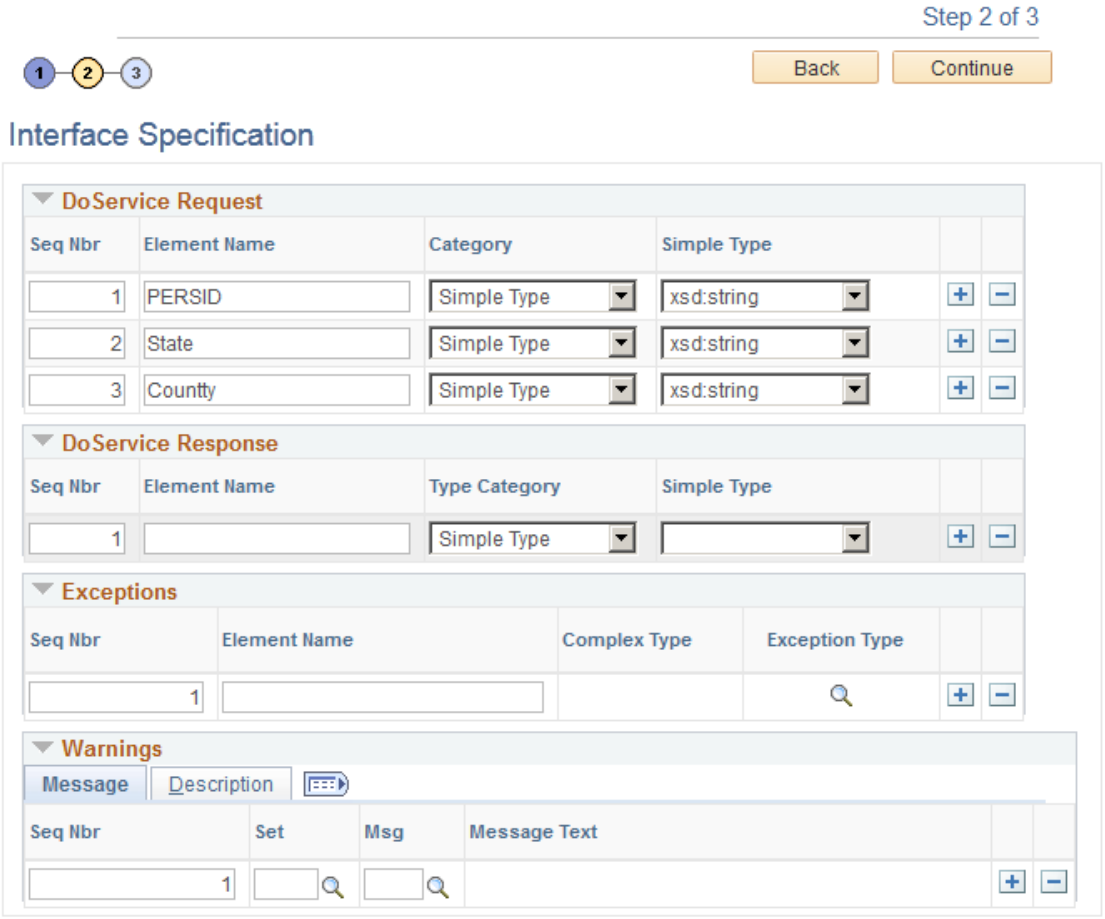
Use the Interface Specification page (HMCR_WZ_STEP2) to enter details about the new interface.

Navigation:

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Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Registration Wizard**, and then **Interface Specification**

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



> **Note**
>
> The system displays a different version of this page depending on what type of interface you're registering. See the Registering Services section for information on how to use this page to register service interfaces.

Field or Control	Description
Initialize from Implementation	If you are basing the Interface View definition on an interface that has already been implemented, click Initialize from Implementation and select the view. The system populates the elements with the fields from the fields in the view's record. **Note:** The system only displays this link when you register Interface Views.

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Field or Control	Description
Seq Nbr (sequence number)	Indicate the order in which the element should occur.
Element Name	Enter the element name. An element is a property of the interface. Element names must be one word, mixed case, and self-describing. **Note:** If you are implementing an Interface View, you must add an element to correspond with each field in the view's record. **Note:** Service interface elements are descriptive items that identify the parameter in a given position. While the position of the elements must correspond to a parameter, it does not have to be a PeopleSoft field name.
Type Category	Select the element category. Categories indicate whether the element's data type is simple or complex. A simple datatype is a system-delivered data format. Complex datatypes reference other interface types already in the registry. **Note:** Always select *Complex* for Exception elements. **Note:** The system selects *Simple* for Interface Views and this field is unavailable for entry.
Simple Type	If the element is simple, select the element's system-delivered data format type: • *xsd:string* • *xsd:date* • *xsd:number* • *xsd:boolean*
Complex Type	If the type is complex, select the registered element to which it refers. **Note:** If the interface is an exception, you must select *ExceptionType* from the Service Framework folder.
Minimum Occurrences	Indicate the minimum number of times this element can occur. Select *0* if the occurrence is optional and *1* if the element must occur at least once. **Note:** You must select *1* for Exception elements.
Maximum Occurrences	Indicate the maximum number of times the element can occur. **Note:** You must select *1* for Exception elements.

Registering Services

When you register a service, enter the follow information in the four group boxes:

- DoService Request

  When a service interface will be used to request information, use the fields in this grid to define the service's request parameters.

- DoService Response

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When a service interface will be used to respond to requests for information, use the fields in this grid to define the service's request parameters.

- Exceptions

  List all of the exceptions defined for the service interface. You can only select exceptions that have already be added to the registry.

- Warnings

  List all of the warnings and messages that could be logged during the execution of the service and that are meaningful to the consumer.

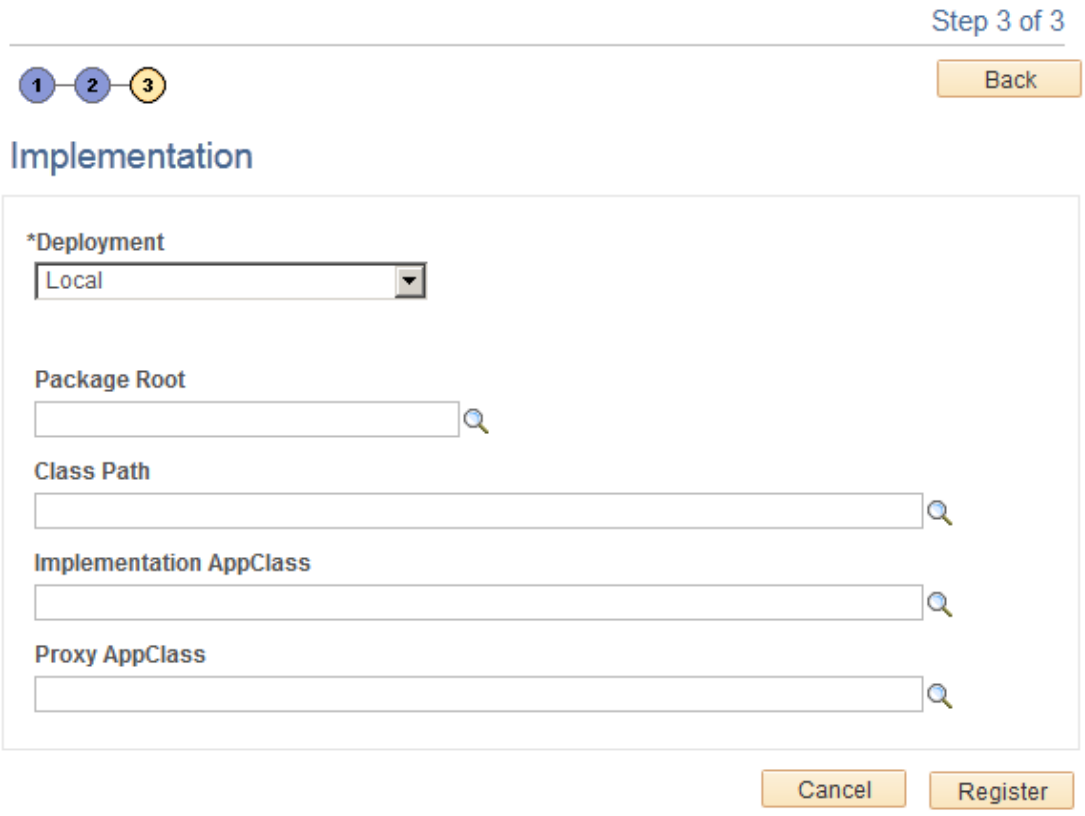
Implementation Page

Use the Implementation page (HMCR_WZ_STEP3) to complete the registration of the new interface by implementing the interface.

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Registration Wizard**, and then **Implementation**

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



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> **Note**
>
> The system displays a different version of this page depending on what type of interface you're registering. See the Registering Interface Views section for information on how to use this page to register interface views.

Field or Control	Description
Deployment and **Deployment Node**	The system displays this field only when you register a Service interface. Indicate if the service is *Local* (resides in the same database as the consumer) or *Remote* (resides outside the consumer's database). If the service is remote, select the deployment node.
Package Root	Select the provider's root package. The root suffix depends on the interface type you are registering: • For Type interfaces: <ownerID>_TYPES. • For Exception interfaces: <ownerID>_EXCEPTIONS. • For Service interfaces: <ownerID>_SERVICES.
Class Path	Select the class path to the appropriate version of your type class.
Implementation AppClass	Once you have implemented the class, return to the registry to select the interface's application class. Do not select a value when you initially register the interface; wait until you have implemented the interface. See Implementing Registered Interfaces. **Note:** If you are implementing a Service interface, populate this field only if the service is local.
Generate Class Code	Click to generate the PeopleCode for the implementation AppClass. You can copy and paste the code into your application class object when you implement the interface. See Implementing Registered Interfaces. **Note:** The system does not display this button when you register Service interfaces.
Register	Click to register the interface definition. When the system successfully registers the definition it will display the interface's IUD.

Registering Interface Views

Field or Control	Description
Interface View	After you have implemented a sqlView for this interface, return to this page and select the view that corresponds to this Interface View. See Implementing Registered Interfaces.

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Field or Control	Description
Related Language Interface View	The system displays the related language view defined in for the implementation in Application Designer, if one exists.

Implementing Registered Interfaces

After you have registered the interface, implement it in the providing application. The providing application must implement the interface accurately so that the consumer application does not encounter any unexpected behavior.

These topics discuss how to:

- Implement types.
- Implement services.
- Implement exceptions.
- Implement SQLViews.

Implementing Types

To implement a registered type interface:

> **Note**
>
> Implement registered types as PeopleCode application classes.

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_TYPES.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.
2. Create the application class that is implementing the interface type.

   When you create the application class, you must ensure that it:

   - Extends the baseType class.
   - Imports the package with the baseType parent class definition.
   - Exposes a read-only property IUD with the type *string.*
   - Has a IUD property that contains the correct IUD of the corresponding registry entry.
   - Instantiates any array properties defined in the class as array properties with 0 elements.
   - Implements the following mandatory public methods: toXmlNode, toXmlNodeString, fromXmlNode, and truncateType.
3. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the interface type.

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The generated type stub code includes the following mandatory methods:

```
method toxmlNode(&parentNode As XmlNode);


method fromXmlNode(&parentNode As XmlNode);


method toXmlNodeString(&nodeName As string) Returns string;


method TruncateType();
```

The system uses the XML mandatory methods to marshal and unmarshal the type to or from an xml representation, which is required in order to use this type in a remote service invocation. The *truncateType* mandatory method resents the value of all type elements.

4. Access the registry entry for the type interface in the Registry Wizard and add the application class to the type's implementation details.

Implementing Services

Consumer programs cannot directly instantiate service implementation classes. Due to late binding and remote procedure call support, the framework delays the resolution of the implementation class name until run-time so the only information available to service consumers during design is the interface name.

At run-time, the service manager resolves the interface name into the implementation class name using the registry lookup functionality. Depending on the implementation details defined in the registry, the service manager will return to the consumer either an instance of a local implementation class or a proxy class for the remote implementation.

Because of these considerations, the providing application needs to supply the following two application classes to fully implement a service:

- An interface that consumer applications can refer to during design.
- An implementation class that the service manager can bind to during run-time.

> **Note**
>
> Implement registered services as PeopleCode application classes.

To implement a registered service interface:

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_SERVICES.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions. Use the third (application class) level to define an interface and an implementation for the service.

2. Create two application classes to implement the service, an interface and an implementation class.

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3. Select the registry entry for this service and click the Generate provider Code button. The system displays a page with three group boxes containing code:
   - Interface PeopleCode

     Copy and paste the interface PeopleCode into the interface application class.
   - Implementation PeopleCode

     Copy and paste the implementation PeopleCode into the implementation application class. The implementation code generated is only a skeleton the actual logic for the application class. The development team must therefore modify the implementation class to meet the providing application's needs.
   - Proxy PeopleCode
4. Confirm that the interface and implementation classes contain the necessary information.

   The two applications serve different functions. The interface class is an abstract definition and details what methods and properties the implementation class will have to have to comply with registered specifications, but it does not contain the implementation details. The implementation class actually implements the interface, providing the executable code for the abstract method definitions.

   The interface application class must:
   - Have names identical to the name of the registered service.
   - Extend the baseService class.
   - Imports the baseService parent class definition.
   - Contain a constructor method that creates an instance of the parent baseService class.
   - Define an abstract DoService method with the signature matching the signature of the registered service.
5. Confirm that the implementation of the service:
   - Implements the interface.
   - Provides a concrete implementation of the DoService method.

     When a development team decides to provide a service, they create an interface and implementation class that implements it.
   - Imports the interface that it implements, as well as the types and exceptions it is working with.

     This happens once you generate the provider code.
   - Throws exceptions in accordance with the registered interface contract in order to handle errors.
   - Can log warnings in accordance with the interface contract.

     The interface application class provides details of all warnings that were generated when the service was executed.
   - Uses the API2CI framework to abstract from the component interface specifics, if the implementation is component interface-based.

     Component interface-based services need to import the CI library (which is provided with the registry) using this code:

     ```
     import HMCR_API2CI
     ```


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If you are using a DoService method, you need to declare two local objects: ciHandler and ciIdent. ciHandler is the class managing all access to a component interface since you cannot directly manipulate a component interface. ciIdent defines the unique attributes of each ciHandler instance.

6. Access the registry entry for the service interface and add the implementation application class to the type's implementation details.

> **Note**
>
> You can use services to organize multiple other services to execute an business task. This is called aggregating services. The aggregating service is the service responsible for managing the business transaction, housekeeping, and performing the save professing so these processes are run only once, improving overall performance. When a service is running another service in aggregation mode, the calling service (the aggregating service) sets the RunAggregated flag on the called service, causing the called service to skip the housekeeping and save processing.

Implementing Exceptions

PeopleSoft delivers a baseException class providing the default exception handling, which is on the PeopleTools exception class. The baseException class constructor takes the following parameters:

- An instance of a service log.
- A message set number and message number.
- Default message text.
- Message parameters 1–5 or "Null" when none.

The base Exception class constructor executes the following logic:

- Adds PSMessages collection to the service log.
- Creates a PeopleTools exception for the provided message set and message number.

To implement a registered type interface:

> **Note**
>
> Implement registered exceptions as PeopleCode application classes.

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_EXCEPTIONS.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.
2. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the exception.
3. Confirm that the exception implementation contains the following:
   - A link to an entry in the PeopleTools message catalog.

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- Default error processing.
- Exception-specific error processing, where necessary.

> **Note**
>
> The exception's registry entry defines the exception name, the fault message structure, and the exception semantics (description).

4. Confirm that the implementation of the exception class:
   - Name is identical to the registry entry name.
   - Extends the baseException and import the baseException class definition.
   - Contains a constructor that:

     — Takes an instance of a LogType as a single parameter and imports the LogType class definition.

     — Facilitates the default error processing by wan of an instance of a parent class.

     — Assigns the correct IUD of the corresponding registry entry to its IUD property.
   - Exposes a read-only property IUD with a type of *string.*

Implementing SQLViews

To implement a registered sqlView interface:

> **Note**
>
> Implement registered sqlView interfaces as PeopleSoft record definitions with a type of *view.*

1. Create fields on the record definition to correspond to each field in the registered sqlView interface.
2. Run SQL Create to create the view in the database.
3. Open the sqlView registry entry and add the implementation record name to the registry entry.

   When you are creating a new interface view, you must use the Registry Wizard component. When you are updating an existing view, you must use access the registry and click the Update button. The system then displays the Registry Wizard component.

   See Registering New Interfaces.

Consuming Registered Interfaces

These topics provide an overview of registered interface consumption and discuss how to:

- Invoke service interfaces.
- Set up stale data checks in service calls.
- Pool component interfaces.

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- Consume collection-sized interfaces.
- Bind complex types to and from portal pages.
- Consume SQLViews.

Understanding Registered Interface Consumption

If there is an interface in the registry that your application needs to use, you must create code in PeopleCode events in the consuming application to invoke the interface.

> **Note**
>
> You can click the Generate Consumer Code button on the Registry Details page for the registered service to generate all the code the consuming application needs. Cut and paste the code into the consuming application's PeopleCode Event (for example, SavePostChange PeopleCode). Confirm that the generated code meets the criteria set out in these steps and make any necessary modifications.

> **Note**
>
> You can only place the code for manipulative services such as *Set, Add,* or *Delete* in the SavePostChange PeopleCode of a single field in a component. You cannot spread out manipulative service calls over several PeopleCode events. You must also not place manipulative service calls in FieldChange PeopleCode.

Invoking Service Interfaces

Consuming applications invoke service interfaces in four steps:

1. Import, declare, and create framework classes, service classes, and type classes.
2. Bind to the service implementation using the Service Manager's LocateService method.

   At runtime, the Service Manager determines the appropriate implemented interface application class and returns an instance of it to the consuming application for invocation as follows:

   a. The import statement in the consumer code indicates which registered interface is required.

   b. The registered interface contains information about which implemented interface class is required.

   c. The Service Manager's LocateService method returns an instance of the implementation class.

> **Note**
>
> The LocateService method requires the service name and the service version in order to bind to the appropriate service.

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The consumer code only needs to know which registered interface it is using. The provider application specifies which implemented class should be returned to the consumer. This enables the provider to make changes to the implemented interface without impacting the consumer.

3. If you are invoking a type interface, the consumer application needs to set the properties of the type class in the input parameters prior to passing it to the DoService call.

   The type interface registry entry describes the properties of the type class. The consumer can map properties individually from the consuming application to the type class properties.

4. Invoke the DoService method of the service implementation class, passing the parameters as defined in the service signature.

   The service signature defines the zero or more input and output parameters that need to be passed to the service. Parameters can be simple types (such as string, number, date, or boolean) or complex types defined and registered as types in the interface registry:

   - When the service requires complex types as parameters, the consumer needs to import the type class, declare it as a local variable and instantiate it using the Create instruction.
   - When the service requires simple types, the simple types only need to be declared by the consumer.

5. Catch and manage exceptions.

   The consumer code must invoke all services within a try-catch block. All code executed in between the try and the catch statement is in a protected area so that any exceptions thrown during service execution will immediately return control to the catch statement in the consumer code. The consuming application can then react to the exception.

   The consumer code can catch specific exceptions or the baseException, which is the parent class to all registered exceptions.

   > **Note**
   >
   > The consuming code should always catch for baseException to catch exceptions not specific to the service.

6. Analyze the service execution log for relevant information.

   During service execution, the registry framework collects all warnings and messages issued by the provider and exposes them to the consumer as a service execution log. The consumer can query the execution log and take action based on the warnings and messages, if necessary.

   Each service has a property called ExecutionLog. The property has an array of LogType called Log. The LogType has the following attributes:

   - DEFAULT_TEXT
   - MESSAGE_SET_NBR
   - MESSAGE_NBR
   - MESSAGE_SEVERITY

   The service's Log class has a generic method ShowLog() to display the content of the execution log.

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> **Note**
>
> All consumer PeopleCode runs within the scope of a consumer component session. Any services that the system invokes during the component runtime will also run within this transaction scope. If the service execution encounters fatal errors, the system will roll back the entire component transaction unless the errors are specifically caught as exceptions. For example, if the a component in the consumer application uses two services invoked by the SavePostChange PeopleCode and one executes successfully while the other throws a fatal error, the system will not save any data to the component from either service.

Setting Up Stale Data Checks in Service Calls

If the service call is updating the component in the consumer application with an action of *Add,* you do not need to set up a check for stale data and you can invoke the service in Component.SavePostChange PeopleCode.

However, if the service is to update prior selected data, you need to set up a stale data check to ensure that the underlying data has not been modified during user interaction on the consumer side. To do this, create a *Get* service in the Component.PostBuild PeopleCode and a *Set* service in the Component.SavePostChange PeopleCode.

If the registry detects a discrepancy in the data, it will cause an error, which can be caught using baseException.

Pooling Component Interfaces

Several services may use the same instance of a component interface in their implementations. To improve performance, you can pool component interfaces. Component interfaces must be scoped to one local PeopleCode event, but within that event the code can send several calls to services using the same open component interface.

The system then passes the component interface pool to the Service Manager's LocateService method. If a requestor is only issuing one service call in a PeopleCode Event, the system passes NULL as a component interface pool.

Consuming Collection-Sized Services

You can set up services to operate on items or on collections (row sets). If the consuming application is working with a collection of rows, you must set up the consuming application to pass the entire collection to the service. The service removes any items that are not passed into the service in the collection. If consumer passes an empty collection, it will effectively remove all the data rows in the provider implementation.

Use a collection-sized *Get* service to populate the collection type class, manipulate it, and pass it back to the *Set* service.

Binding Complex Types To and From the Portal Pages

All services work with simple or complex types as parameters. Simple types are available as PeopleCode data types. The provider application implements complex types as application classes. It is not possible to view application class properties directly on a page so it is

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necessary for the consumer application to create pages based on Rowset.Row.Record.Field objects and map the type class properties to the fields.

In the consumer code, set up a call to the helper method *PopulateToRowset* to bring all data from the type class instance to the user interface of the consumer component. Set up a call to the helper method *PopulateFromRowset* to bring all values from the rowset used in the user interface of the type class.

> **Note**
>
> Not all type classes provide helper methods and not all helper methods will work in all consumer components. In these cases, you will need to write your own logic to bind the type class values to the consumer user interface.

Consuming SQLViews

Consuming applications can use registered sqlViews directly without binding. Use registered sqlViews for the following:

- Search views.
- Prompting.
- Related display.

Maintaining the Registry Folder Structure

To administer the HCM interface registry, use the Administer Service Registry component (HMCR_CONTENT_ADMIN).

This topic discusses how to maintain the registry folder structure.

Page Used to Maintain the Registry Folder Structure

Page Name	Definition Name	Usage
Administer Service Registry Page	HMCR_CONTENT_ADMIN	Add or delete folders from the registry.

Administer Service Registry Page

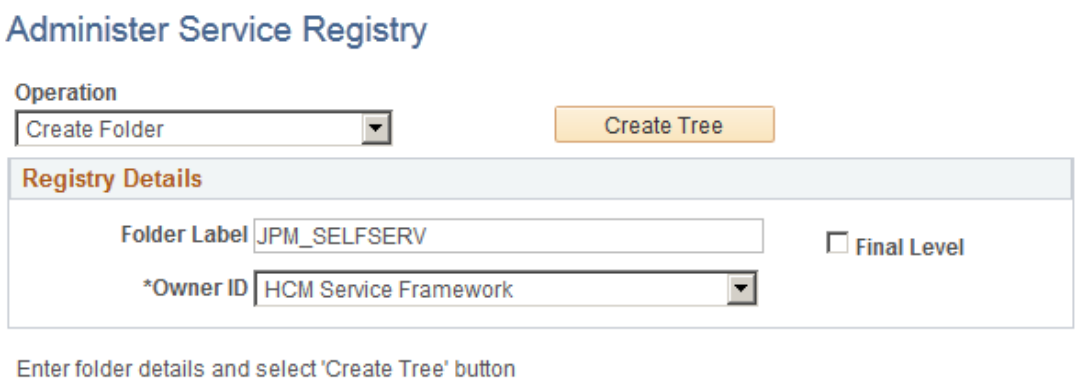
Use the Administer Service Registry page (HMCR_CONTENT_ADMIN) to add or delete folders from the registry.

Navigation:

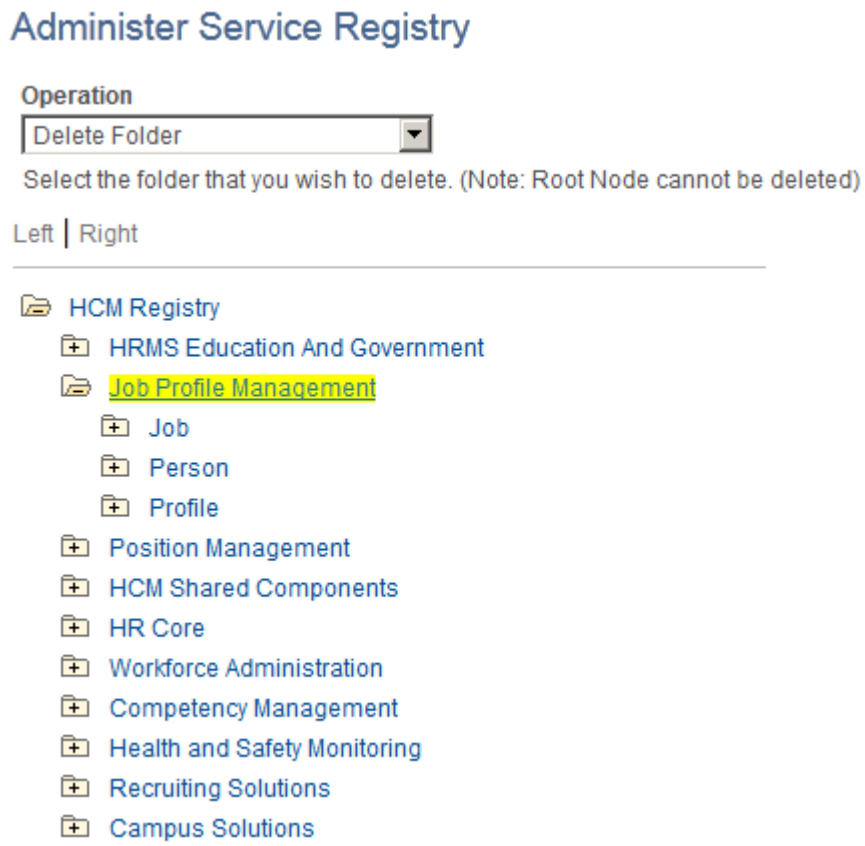
Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Administer Service Registry**, and then **Administer Service Registry**

This example illustrates the fields and controls on the Administer Service Registry page when *Create Folder* is selected. You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Administer Service Registry page when *Delete Folder* is selected. You can find definitions for the fields and controls later on this page.



Create Folders

To create a new folder, select *Create Folder* in the **Operation** field and enter the folder's registry details.

Field or Control	Description
Folder Label	Enter the folder label that will appear in the registry.

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Field or Control	Description
Owner ID	Select the folder content's owner ID from the list of options.
Final Level	Indicate if the folder is a final folder. A final folder can not have any child folders other than the folders for the four interface types. If you make this folder a final folder, the system will create the four interface folders. If you leave this check box deselected, the folder is a feature folder and you can add child folders to it.
Create Tree	After you have entered the folder details, click the Create Tree button. When you click the button the system generates a new registry tree. Navigate through the tree and select the node under which the new folder should go. You can only place a new folder under folders that have the same owner ID and that are not final level folders.

Delete Folders

To delete a folder, select *Delete Folder* in the **Operation** field. Expand the registry tree, locate the folder you want to delete, and click on it. You cannot delete a folder that contains registered interfaces within one if it's child folders.

Testing Services

To test newly created services, use the Service Tester component (HMCR_SRV_TESTER).

This topic discusses how to test services.

Page Used to Test Services

Page Name	Definition Name	Usage
Service Tester Page	HMCR_SRV_TESTER	Test newly created services in this generic component.

Service Tester Page

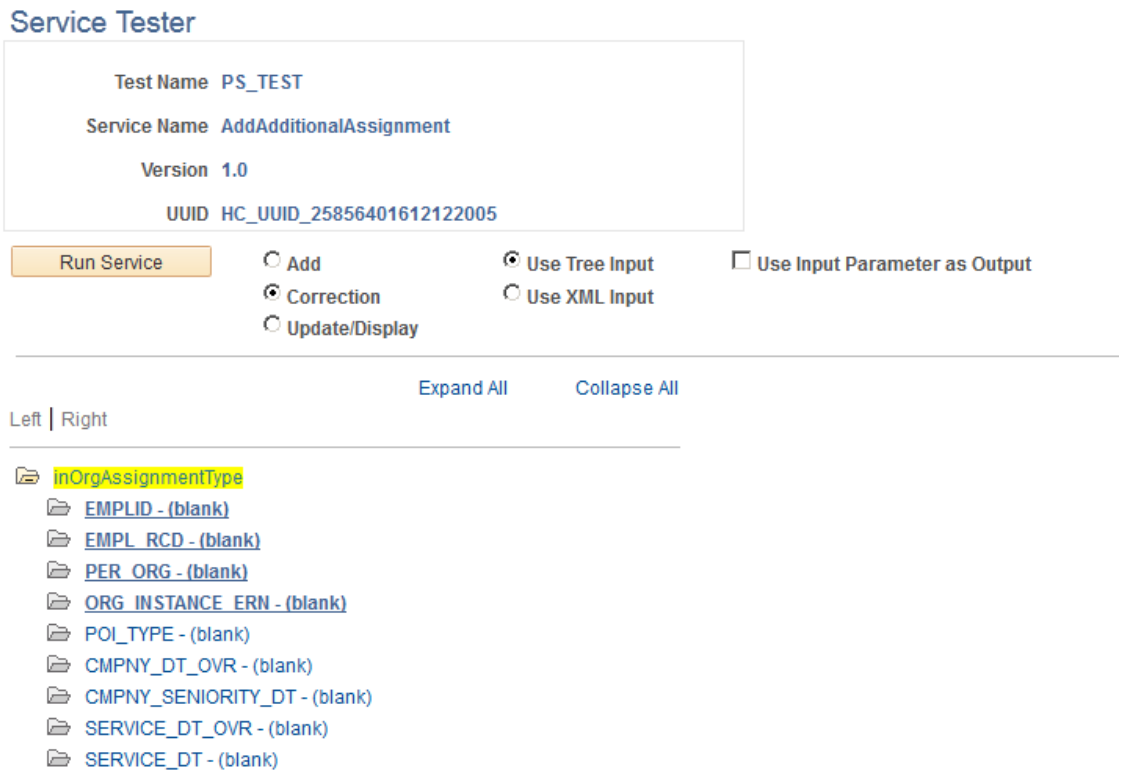
Use the Service Tester page (HMCR_SRV_TESTER) to test newly created services in this generic component.

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Service Tester**, and then **Service Tester**

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

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Use this page to test newly created services through a generic component. For example, if you create a new service using the Registration Wizard component and the corresponding implementation code, you can use this page to test the service and ensure that service you are committing works as designed. The system returns the results of the service test in a new window as XML.

Field or Control	Description
Add, **Correction**, or **Update/Display**	Select the mode that the service will run in. You can use these options to test the service running in the various modes.
Use Tree Input and **Use XML Input**	Select to populate inputs using an XML format (SOAP 1.2) or using the tree structure. When you click the Use XML Input button, the system converts the tree inputs to the corresponding SOAP document. This is useful for testing remote services, for populating the inputs of a larger service, and for copying an existing service to a new service test (similar to "save as" functionality).
Use Input Parameters as Output	Select this check box for services which have no input parameters but do update the input parameters that are passed in. This is valid only for local services because remote services cannot update inputs by reference. It is not recommended for local services but can be used where local services where this situation exists.

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Field or Control	Description
Run Service	Click this button to invoke the service request after you have populated the inputs. Upon completion of the service call, the system displays the outputs of the service in a new window as XML.

Viewing and Registering Transformation Maps

To view transformation maps, use the Transformation Registry component (HMTF_TRF_REGISTRY). To register transformation maps, use the Register Transformation Map component (HMTF_WZ_TRF).

These topics discuss how to register transformation maps.

Pages used to View and Register Transformation Maps

Page Name	Definition Name	Usage
Transformation Registry Page	HMTF_TRF_REGISTRY	View HCM transformation maps.
Register Transformation Map Page	HMTF_WZ_STEP1	Create transformation maps for messages from one message version to another.

Transformation Registry Page

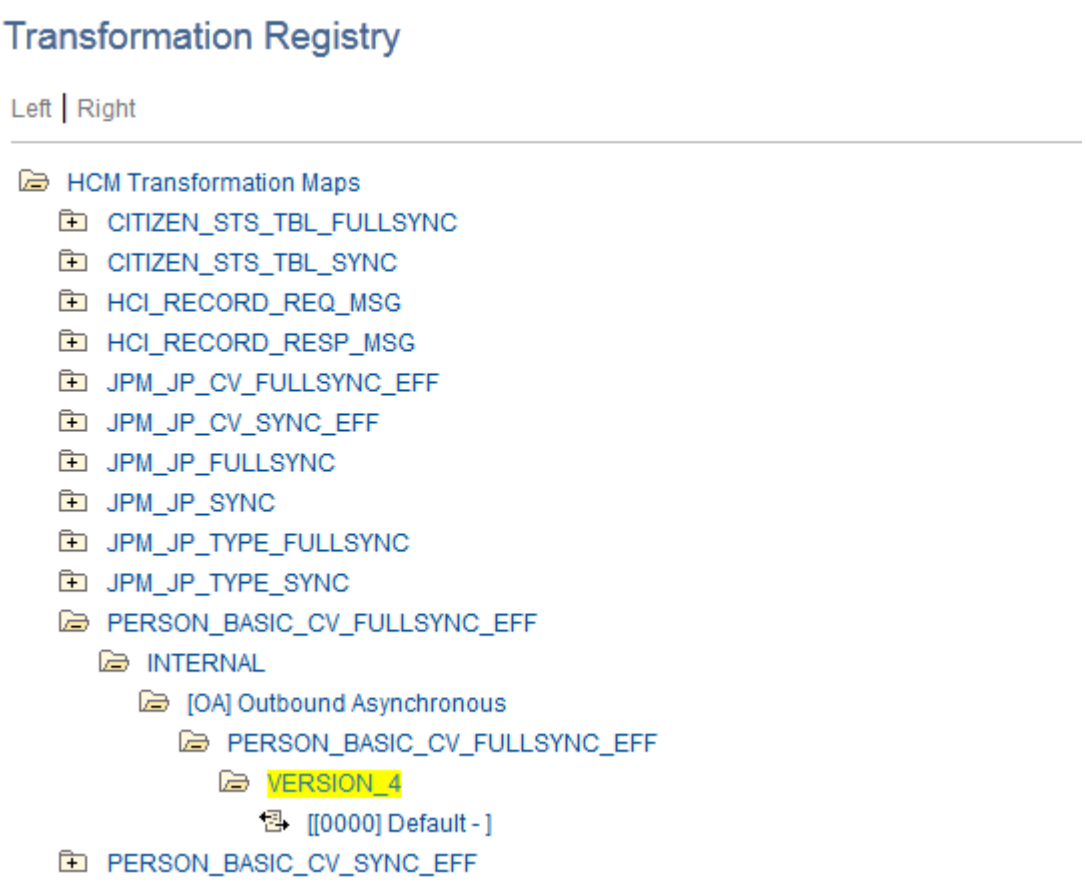
Use the Transformation Registry page (HMTF_TRF_REGISTRY) to view HCM transformation maps.

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Transformation Registry**, and then **Transformation Registry**

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

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Use this page to view details of transformation maps, which instruct the system to convert incoming messages (From) into (To) a specific format. Primarily this is done because, between release, the record definitions may have undergone a change.

Register Transformation Map Page

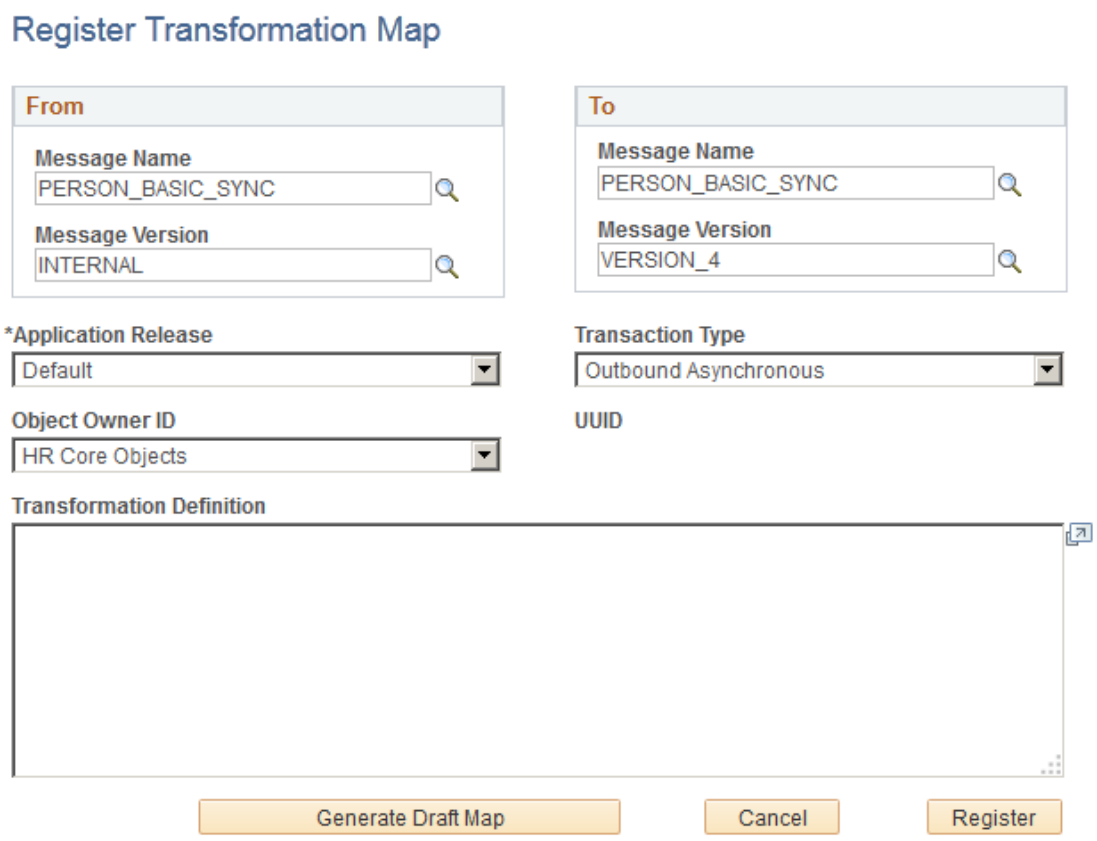
Use the Transformation Map page (HMTF_WZ_STEP1) to create transformation maps for messages from one message version to another.

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Register Transformation Maps**, and then **Register Transformation Map**

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

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When you need to exchange information between two different release of a PeopleSoft product you must perform transformations. With each release record definitions sometimes undergo changes. Transformations enable you to scale these problems by transforming messages from one release to another. Use this page to create transformation maps for messages from one release to another and from one version to another.

Field or Control	Description
Message Name	Select the message that needs to be transformed from one version to another.
Message Version	Select the version of the message that needs to be transformed for one version to another.
Application Release	Select which PeopleSoft application release that the message belongs to. For example, specify whether the message is from the HCM 8.3 system or the HCM 8.8 system. The *Default* value is that the system use the current release of the product.
Transaction Type	Select the type of transaction of the message, either *Inbound Asynchronous, Inbound Synchronous, Outbound Asynchronous,* or *Outbound Asynchronous.*
Object owner identifier	Select the owner of the message object.
IUD	The system displays a unique identifier for the transformation. The system generates this identifier.

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Field or Control	Description
Transformation Definition	View the definition of the transformation in XML format.
Register	Click this button to register the transformation.

Mapping HCM Services to Integration Broker

These topics provide an overview of HCM service mapping to Integration Broker and discuss how to:

- Map HCM services to Integration Broker.
- Delete mapped services.
- Use Integration Broker to provide web services.

Understanding HCM Service Mapping to Integration Broker

You can invoke HCM services from remote (non-PeopleSoft) systems. The SOA framework contains built-in functionality to process an incoming requests (services) and return the required response. This built in functionality gives you the ability to:

- Generate a web service automatically.
- Publish WSDL to the PeopleSoft repository.
- Publish WSDL to UDDI.
- Synchronize Integration Broker services with the Integration Services Repository (ISR) automatically.

PeopleTools Integration Broker serves as the transport mechanism for services. By mapping your HCM services to Integration Broker, you ensure that your Service Registry conforms to industry standards.

Mapping HCM Services to Integration Broker

These topics discuss how to:

- Map an HCM Interface Registry folder to an Integration Broker service.
- Map an HCM service to an Integration Broker service operation.
- Map interface details.
- View service operation security.
- View service operation handlers.
- View service operation routings.

Mapping an HCM Interface Registry Folder to an Integration Broker Service

Initiate the mapping of HCM services to Integration Broker through the HCM Interface Registry. The system permits mapping at only third level folders, which are the lowest sub-categorization of HCM services for products.

To map the HCM Interface Registry metadata for a particular folder to an Integration Broker service:

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1. Click the folder name link on the Service Registry page for a third level folder.

   The system displays the WSDL for that registry folder.

2. Click the **Add to service repository** button to add to the service repository.

   Provided that you have set up Integration Broker, the system displays details of the service.

> **Note**
>
> The **Delete from service repository** button is available only when you have mapped the registry folder to the Integration Broker service repository, at which time the **Add to service repository** button becomes unavailable. This ensures that you can only perform the correct action.

The system automatically generates an Integration Broker service name for the folder. This service name is the IUD for the folder, which is unique string within the HCM Interface Registry and thus guarantees that each service has a unique name. Optionally, you can rename the Integration Broker service to give it a more meaningful name through the Service Administration component **(PeopleTools**, and then **Integration Broker**, and then **Service Utilities**, and then **Service Administration).** If you rename the service, the system still guarantees a unique name because the Service Alias field contains a copy of the IUD service name. This ensures that the delete process has a means of correlating the service with the HCM Interface Registry.

> **Note**
>
> *Do not* change the Service Alias field under any circumstances because it is critical to service delete processing.

Mapping an HCM Service to an Integration Broker Service Operation

Each HCM service that is in a registry folder on the Service Registry page is mapped to an Integration Broker service operation and can be found in the service that you have generated for the folder on the Services page **(PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Services).** The system uses the name of the HCM service as the name for the service operation, unless that service operation already exists. If the service operation does already exist, an algorithm works within the length constraints of the Service Operation Name field (30 characters). The algorithm replaces the endmost characters with digits until it generates a unique name. The system retrieves the version for the service operation from the HCM Interface Registry.

Mapping Interface Details

The system maps each input and output interface to an integration Broker non-rowset based message, complete with generated schema. The system also assigns the version from the HCM Interface Registry. The base name for the messages is the HCM service name plus the suffix _IM or _OM to designate input or output interfaces, respectively (for example, ADDPOITYPE_IM).

The system maps outfault interfaces to Integration Broker non-rowset based part messages. This is due to the limitation of Integration Broker having only one fault message per service operation. Therefore, the system creates all outfaults that are associated with a mapped HCM

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service within an Integration Broker container message. The system indicates outfault messages by using the suffix _FM (for example, ADDPOITYPE_FM).

Viewing Service Operation Security

The system assigns each service operation that you generate the standard HCSPSERVICE permission list. Access the permission list details for the web service on the Web Service Access page **(PeopleTools**, and then **Integration Broker**, and then **Service Operations**, and then **General** click the Service Operation Security link).

Viewing Service Operation Handlers

The system assigns a handler to each service operation that you generate. The assigned handler references a generic handler class that is processing the incoming request, and generates the required response. The generic handler is HMCR_FRAMEWORK:IB_Framework:Handlers:IB_SyncRequestHandler. Access handlers for service operations on the Handlers page of the Service Operations component **(PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations).**

Viewing Service Operation Routings

Within the HCM Registry there is no indication of consumers for a given service, so the system does not generate routings during the mapping process. It is up to the development teams to create the necessary routings.

Deleting Mapped Services

Use the Service Registry to delete HCM services that you have mapped to Integration Broker. The system makes available the **Delete from service repository** button in the Service Registry only for folders that you have already added to the Integration Broker metadata.

The delete process removes the following objects from the Integration Broker metadata:

- WSDL
- Services
- Service operations
- Service operation security
- Service operation handlers
- Service operation routings
- Messages (input, output, fault container, and part)
- Message schemas

Using Integration Broker to Provide Web Services

One main reason for mapping HCM services to Integration Broker is to use Integration Broker's capability of providing web services. You can provide a web service only for service operations that you define as having any-to-local routing. You create these service operations, along with their handlers and routings, in the Service Operations component.

To set up any-to-local routings for service operations:

1. Access the Service Operations component **(PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations).**

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2. Select the Generate **Any-to-Local** check box in the **Routing Actions Upon Save** area of the General page.
3. Save the component.

   The system updates the **Any-to-Local** value of the **Routing Status** area to *Exists.*

   The system also generates the routing and displays it on the Routings page of the component.

You can publish as a web service any service that has at least one service operation defined as any-to-local.

To publish a qualifying service as a web service:

1. Access the Provide Web Service component **(PeopleTools**, and then **Integration Broker**, and then **Web Services**, and then **Provide Web Service)** to launch the Provide Web Service Wizard.

   The system displays the Select Services page.
2. Search for the service that you wish to publish as a web service.
3. Select that service in the returned search results, and then click the **Next** button.

   The system displays the Select Service Operations page.
4. Select the service operation for the service that you want to publish as a web service, and then click the **Next** button.

   The system displays the View WSDL page.
5. Click the View WSDL link for a service to view the WSDL that the system generated for the service.
6. Return to the View WSDL page and click the **Next** button.

   The system displays the Specify Publishing Options page.
7. Define where to publish the selected services.

   Select the Publish to UDDI check box or the WSDL Repository check box to publish the services to the corresponding location.

   The system displays the Provide Web Service - Results page.
8. View the WSDL generation log to confirm the results of the wizard.

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Setting Up and Building Organization Charts

Understanding Organization Charts

PeopleSoft Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. To build organization charts, you decide whether to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees, then run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Formatting options in the Visio Organization Charting Wizard enable you to easily create detailed charts of only one department or your entire organization.

Prerequisites

Before you can create organization charts, you must:

- Make sure that Visio is installed on your client.

  Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio on the client computers separately. For more information about installing Visio, see your Visio documentation.
- Select Visio as your Organization Chart interface on the Third-Party/System page in the Installation Table component (INSTALLATION_TBL).
- Make sure that organization and person data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Creating Organization Charts

These topics provide an overview of the process and discuss how to create organization charts.

Page Used to Create an Organization Chart

Page Name	Definition Name	Usage
Build Organization Chart Page	ORGCHART_PNL	Create an organization chart based on PeopleSoft Human Resources system trees.

Understanding the Process

To create organization charts that are based on your human resources data:

- Run the Organization Chart SQR from the Organization Chart page.
- Copy the resulting file to the client.

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- Review the organization chart information gathered by the Organization Chart SQR.
- Start Visio and run the Vision Chart Wizard.

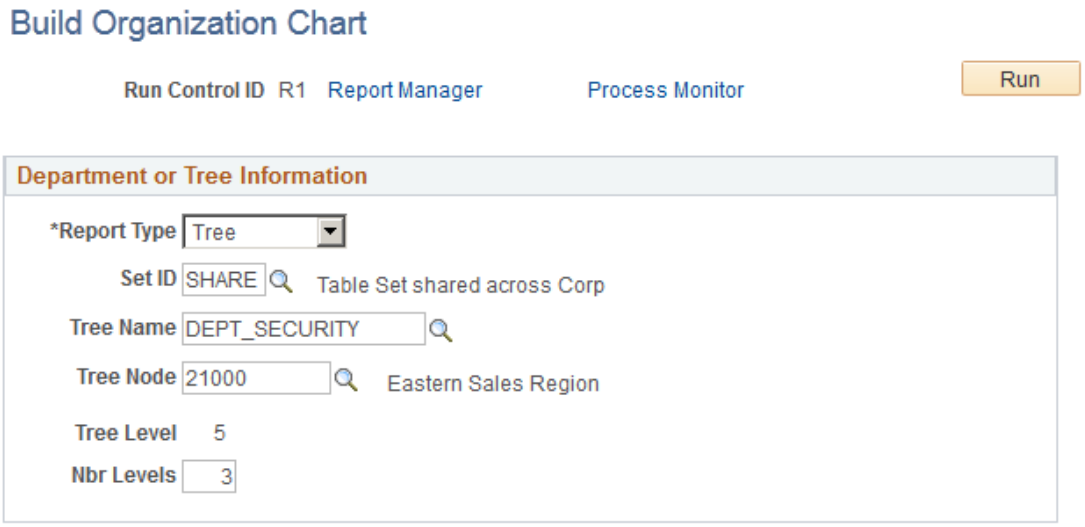
Build Organization Chart Page

Use the Build Organization Chart page (ORGCHART_PNL) to create an organization chart based on PeopleSoft Human Resources system trees.

Navigation:

Organizational Development, and then **Position Management**, and then **Create Organization Structure**, and then **Build Organization Chart**, and then **Build Organization Chart**

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



Field or Control	Description
Report Type	Select a report type. Options are: • *Department* Builds your chart based on a single department that you select. • *Tree* Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

> **Note**
>
> You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

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Building Your Chart Using Departments

If you select **Department** in the **Report Type** field, then the **Set ID** and **Department** fields appear.

Field or Control	Description
Department	Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)
Run	Click **Run** if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree,* the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.
2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

Field or Control	Description
Tree Node	Select the level of the tree on which you want the organization chart to start. For example, if you're using a department tree, select the department.
Tree Level	The system enters the tree level of the tree node that you selected.
Nbr Levels (number of levels)	Specify the number of levels to include in the tree. For example, if you begin the chart at tree level*5* and you specify the number of levels as*3*, the organization chart includes levels 5 though 7 of your tree.

Related Topics

- Creating and Modifying Security Trees
  You can create a security tree automatically or manually.

Copying the Organization Chart File to the Client

The Organization Chart SQR creates the ORGCHART.TXT file and stores it in the application server. To create an organization chart using Visio, you need to copy the ORGCHART.TXT file to a client computer. You will run Visio and create the organization chart on the client.

To copy the ORGCHART.TXT file:

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1. Access the Process Monitor – Process List page (PMN_PRCSLIST) **(PeopleTools**, and then **Process Scheduler**, and then **Process Monitor).**
2. Locate the organization chart process and click the associated Details link.
3. Click the **View Log/Trace** link.
4. Click the **ORGCHART.TXT** link to open the file.
5. Select **File**, and then **Save As** and save to the client.

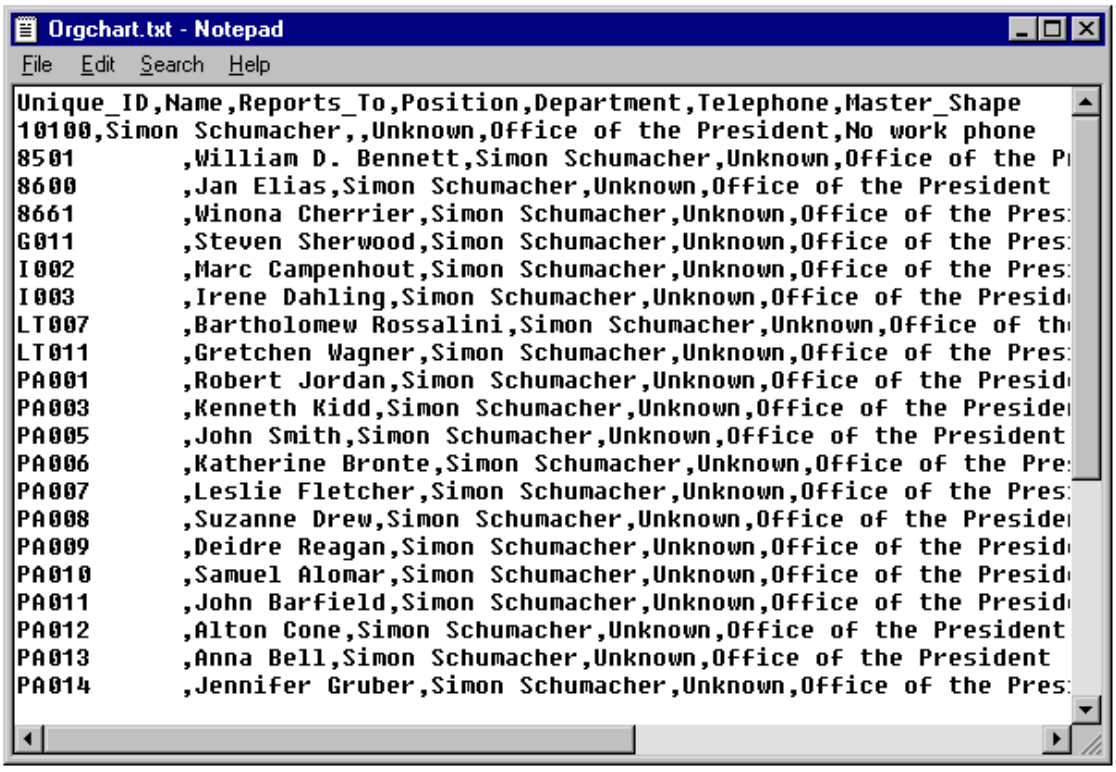
Reviewing the Organization Chart

To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The file contains the following data:

- Unique ID
- Name
- Reports To
- Position
- Department
- Telephone

Following is an example of the ORCHART.TXT file:

Example of ORGCHART.TXT file



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Using the Visio Organization Chart Wizard

Open Visio and use the Organization Chart Wizard to create your organization chart automatically.

> **Note**
>
> These instructions are for Visio 2000. The Organization Chart Wizard may operate slightly differently for other Visio versions.

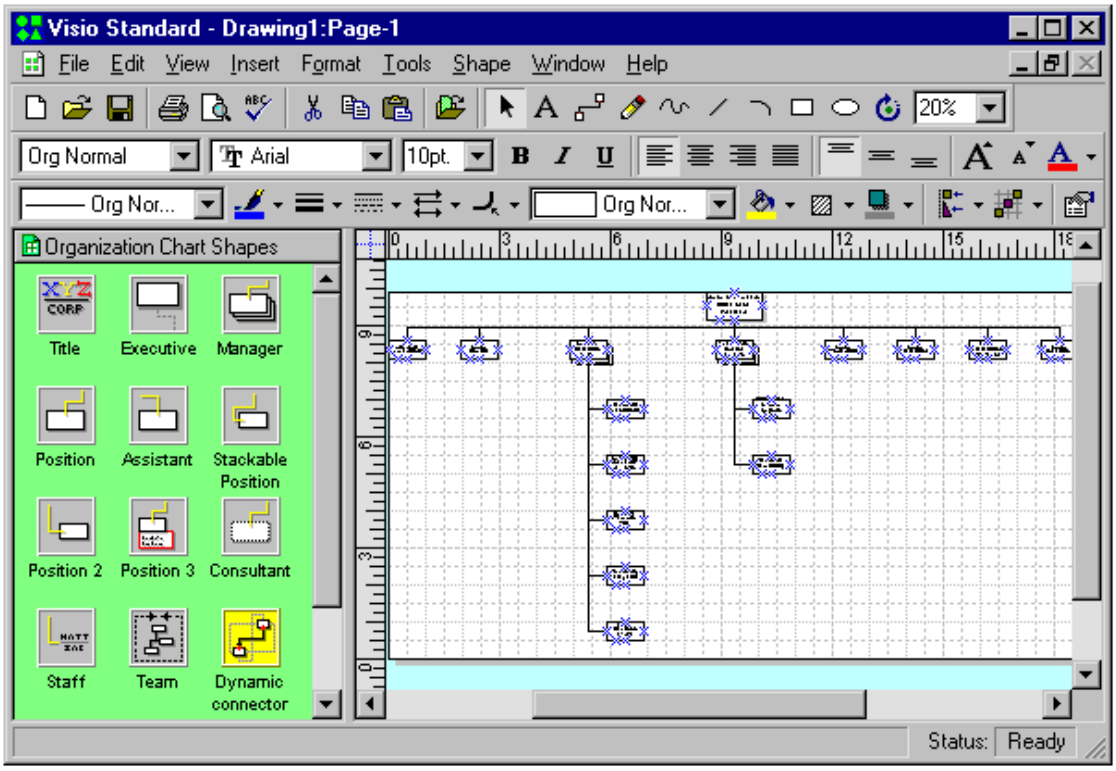
To run the Organization Chart Wizard:

1. In Visio, select File, New, Organization Chart, Organization Chart Wizard.
2. In the window that appears, select the option *Information that's already stored in a file or database* and click Next.
3. On the next window select the option *A text, Org Plus (*.txt), or Microsoft Excel file* and click Next.
4. On the next window enter the location on the client that contains your organization information (where you saved the ORGCHART.TXT file), for example *C:\TEMP\ORGCHART.TXT* and click Next.
5. Select *Name* for the Name field, *Reports_To* for the Reports to field, and <*none*> for the First Name (optional) field and click Next.
6. Select the data that you want displayed in the chart shapes (for example *Name* for the First Line and *Position* for the Second line) and click Next.
7. Add other fields contained in the ORGCHART.TXT file to the Org Chart by selecting them from the Data file columns and adding them to the Custom Property fields column. Click Next.
8. Select *I want the wizard to automatically break my organization chart across pages* and click Finish.

Following is an example of the Visio page that you see when your organization chart is complete:

Example of a department organization chart in Visio.

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> **Note**
>
> For more information about editing and printing your organization chart in Visio, see your Visio documentation.

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Setting Up and Processing Mass Updates

Understanding Mass Update Processing

These topics discuss:

- Mass update architecture.
- Steps for a mass update run.
- Tips for a successful mass update run.

> **Note**
>
> PeopleSoft no longer supports HCM-specific Mass Change templates. We have left the templates in the database for your convenience, but recommend that you use the Mass Update feature.

See *PeopleTools: Security Administration*.

Mass Update Architecture

The Mass Update feature enables you to make changes to the data of large groups of people. For example, you can use the Mass Update feature to perform company-wide compensation increases, department transfers, job code changes, labor agreement changes, and reorganizations.

The Mass Update feature consists of the following modules:

- *Mass Update Manager:* This is the front-end module that provides the user interfaces for the Mass Update feature. It consists of:
  - The Define Mass Update component (MU_SETUP) for setting up mass update definitions.
  - The Create Mass Updates component (RUNCTL_MU_CREATE) and related Application Engine (AE) process for generating mass update transactions.
  - The Report Mass Updates component (RUNCTL_MU_PRINT) and related Structured Query Report (SQR) report for reviewing and printing lists of mass update transactions.
  - The Manage Mass Updates component (MU_MANAGE) for reviewing or previewing mass update transactions, managing statuses, and processing mass update transactions individually online.
  - The Execute Mass Update component (RUNCTL_MU_EXECUTE) and related AE process for running mass updates in batch.
  - The Delete Mass Updates component (RUNCTL_MU_DELETE) and related AE process for deleting pending mass update transactions.

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- *Transaction Processor:* This is a back-end module that consists of the Configure Processor component for setting up and managing system data that is available for mass updates and an application class that provides access to transaction processing functionality. The role of the Transaction Processor application class is to provide access to services within the Services Oriented Architecture (SOA) to read (select and write, or update, information. Each transaction is an XML message that contains the list of elements that are involved in the update for a specific employee and employee record combination. The Transaction Processor application class interprets this XML message, provides access to the correct service, and returns acknowledgements and any exceptions to the online or batch process that calls it.
- *Execution Manager:* This is a back-end module that is a mechanism in the batch mass update process to manage and monitor parallel processing through spawning. *Spawning* is a method of simultaneously running multiple instances of a child process by a parent process. The Execution Manager enables you to run multiple instances of the batch mass update process and run these instances in parallel to improve performance.

> **Note**
>
> The Mass Update framework relies on SOA framework.

Steps for a Mass Update Run

To process mass updates:

1. Set up a mass update definition through the Define Mass Update component.
2. Run the mass-update selection phase and create transactions for mass update through the Create Mass Updates page (which is part of the Mass Update Manager module.)
3. Review and update transactions.

   You can review and update transactions online through the Manage Mass Updates component.

   You can also generate a report to review transactions from the Report Mass Updates page.

   Both components are part of the Mass Update Manager module.
4. Process transactions using the Transaction Processor.

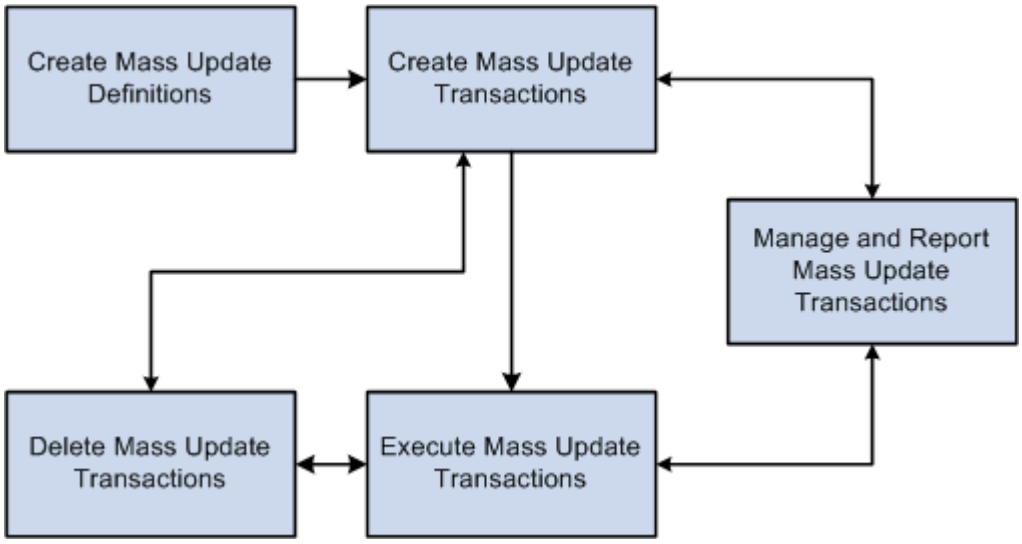
   You can process transactions one at a time from the Manage Mass Updates component, which is part of the Mass Update manager module.

   Or you can process transactions in batch through the Execute Mass Updates page, which is part of the Execution Manager module.
5. (Optional) If necessary, cancel transactions through the Manage Mass Updates component, which is part of the Mass Update Manager.
6. (Optional) If necessary, delete transactions one at a time through the Manage Mass Updates component, or delete transactions in batch through the Delete Mass Updates page.

   Both components are part of the Mass Update Manager module.

The following diagram illustrates this process flow of mass update processing:

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Tips for a Successful Mass Update Run

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain that you want to override data.

  If possible, add a new effective-dated row, instead.
- Familiarize yourself with the online transaction to understand the rules governing the component before trying to automate it using the Mass Update process. When you update a component using Mass Update, it is governed by the same rules (such as defaulting and required fields) as when you access the component online.
- Create several simple Mass Update IDs that you can use in combination instead of trying to create a complicated one that changes everything.

  In addition to being more flexible, this approach facilitates identifying the source of errors.

Important

The Mass Update feature uses services to update data. Services run all of the business logic that is associated with a component, which ensures that the components function correctly and that the data is consistent. However, updating the data in this manner, while more complete, is slower than some other methods (such as a SQL update). When you run a mass update, take steps to improve performance, such as limiting the size of the transaction set, performing the update at night when server traffic is low, or both.

Configuring the Transaction Processor for Mass Updates

Use the Configure Processor component (MU_TP_SETUP) to define the sections and elements that are available for mass updates.

These topics provide an overview of and discuss Transaction Processor configuration.

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Snapshot - Job Details: Job History Page

Use the Job Details: Job History page (HCTS_JOB_DTLS_FL) to view a summary of a person's job history.

Navigation:

Select the from the or (Employee) PeopleSoft eProfile: Career Snapshot - Summary Dashboard and select the Job History tab item.

This example illustrates the Job Details: Job History page.



Understanding Transaction Processor Configuration

The Transaction Processor is an Application Class that can process changes in the application by means of services, based on a transaction that contains the details of the change. The system uses the Transaction Processor to perform mass updates either online through the Manage Mass Updates component or in batch through the Execute Mass Update component.

Mass update processing relies on the configuration of the Transaction Processor. To perform this configuration, you must use the Configure Processor component. This component is intended for technical users with a high level of experience. PeopleSoft provides many predefined sections within the Configure Processor component for performing mass updates.

The Transaction Processor setup defines the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section. You can then use the Define Mass Update component to create mass update definitions. During mass update processing, the Mass Update Manager triggers the Transaction Processor to process mass update transactions using the section, elements, and values that you define on the applicable mass update definition. For each section that the Transaction Processor encounters, it refers to the Transaction Processor setup for the right service, and then triggers the service with the values that are defined in the transaction.

> **Note**
>
> If you add Job Profile Manager (JPM) catalog types to the system, then to perform mass updates to the newly added JPM data, you must replicate those catalog types in the Configure Processor component.

Configure Processor Page

Use the Configure Processor page (MU_TP_SETUP) to define the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section.

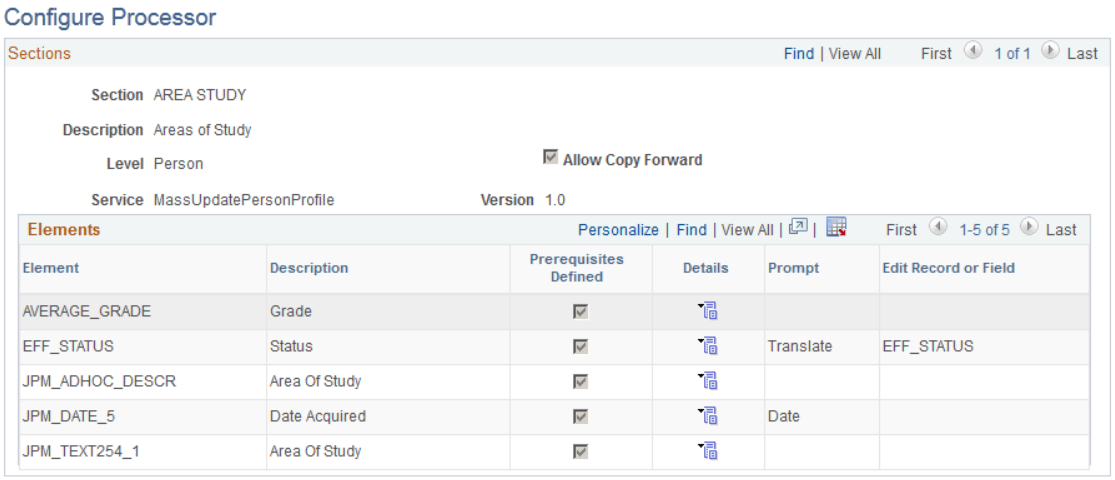
You also define prompt and prerequisite information that the system uses when you create mass update definitions through the Define Mass Updates component.

Navigation:

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Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Configure Processor**, and then **Configure Processor**

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



Sections

Field or Control	Description
Section	Enter the name of the section. A section is a functional group of elements and is defined within a service.
Description	Enter the description of the section. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the **Section** field.
Level	Select whether the Component Interface is based on an *Employee Record* number or a *Person.* By default, the system selects the *Person* value. When the Mass Update Manager module generates mass updates for a person, it uses the selected level to ensure that it generates these update transactions for the same person once only. The Transaction Processor module uses the selected level to provide access to the service that contains the correct key values.
Allow Copy Forward	Select to make the Copy Forward option available for the section or service in the Define Mass Update component.

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Field or Control	Description
Service	Enter the service that the system uses to manage the update for the corresponding section. The service that you specify provides all the controls and defaults for mass updates that involve the section; no processing logic is within the setup itself. PeopleSoft Human Resources delivers the following services for use with mass update processing: Job Data (which includes specifics for compensations and labor agreements), Person Data, Job Profile Manager, and Military Approval Tracking. Each service is defined using data types and uses the same base class. Each data type defines the elements that are available for the service. To manage services, use the Service Registry component. **Note:** You can also build your own services and incorporate them into the Mass Update feature. To have the mass update process access data beyond the delivered services, you must define a service to manage the specific requirements, register the service, and then update the Transaction Processor setup.
Version	Enter the version of the specified service.

Elements

Field or Control	Description
Element	Enter the object name of the element or data type that you want to make available for a mass update that uses this section. You can enter as a value any simple data type that is defined in the service. The elements that you list provide the information that is available for a mass update.
Description	Enter the description of the element. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the **Element** field.
Prerequisites Defined	The system automatically selects this check box whenever you have defined prerequisites for the element.
Details	Click this button to access the Prerequisites page, where you can define prerequisites for the corresponding element.

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Field or Control	Description
Prompt	Select how you want to define the prompt for the element. The prompt that you select determines how you can define the value of the section and element combination on the Define Mass Updates page. Possible values are: • *Action:* When processing a mass update for this section and element combination, the system performs the specific action within the application that the element defines. For example, an element might perform the action of pressing a button or setting a default value (in that case, there is no prompt). • *Checkbox:* When you are defining a mass update for this section / element combination, the system displays a **Boolean Value** check box. • *Date:* When you are defining a mass update for this section / element combination, the system displays a **date** field. • *Numeric:* When defining a mass update for this section / element combination, the system displays a **Numeric Value** field. • *Record:* When defining a mass update for this section / element combination, the system displays a **Character Value** field that prompts against the record that you specify in the *Edit Record or Field* field. • *Translate:* When defining a mass update for this section / element combination, the system displays a **Character Value** field that prompts against the field that you specify in the *Edit Record or Field* field.
Edit Record or Field	If you select to prompt for the element with a record, select the record. If you select to prompt for the element with a translate value, select the field name.

Configure Processor - Prerequisites Page

Use the Configure Processor - Prerequisites page (MU_TP_SETUP_PRE) to define the prerequisites elements that you must define as part of a mass update definition for the given section.

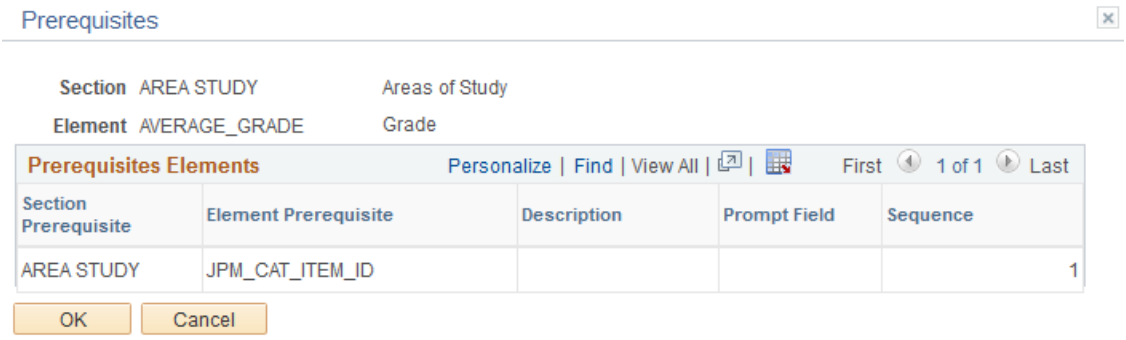
These prerequisites establish the relationships between elements that are available for mass update transactions.

Navigation:

Click the **Details** icon on the Configure Processor page.

This example illustrates the fields and controls on the Configure Processor - Prerequisites page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Section Prerequisite, Element Prerequisite, and **Description**	Select the section and element that is a prerequisite to this section and element when defining a mass update. The system prompts you to select from the sections that you have defined in this component and the elements that you have defined for the selected section prerequisite. The system displays the name of the element prerequisite that you select.
Prompt Field	Select the field that you want to use to prompt for the prerequisite element. This field is used internally in order to identify which field of the prompt record will be populated with the value of the prerequisite field. For instance, the element Work Location / Department has the element Work Location / Business Unit as prerequisite. Then, the field SETID will be populated with the value of Business Unit when used in the prompt record DEPT_TBL.
Sequence	Enter the sequence in which you need to enter the prerequisites when defining a mass update.

Setting Up Mass Update Definitions

To set up the mass update definitions to process mass updates, use the Define Mass Update component (MU_SETUP).

These topics provide an overview of an discuss setting up mass update definitions.

Pages Used to Set Up Mass Update Definitions

Page Name	Definition Name	Usage
Define MU Page	MU_SETUP	Select the generic information for the mass update definition. The options that you select apply to all updates that you process for this definition.

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Page Name	Definition Name	Usage
Common Changes Page	MU_SETUP_CHANGES	Define the content of the mass update by specifying the population selection criteria and common data changes. To create a valid mass update definition, you must define at least one row of data on either the Common Changes page or the Additional Changes page.
Additional Changes Page	MU_SETUP_ADD_CHG	Define the content of the mass update for each additional population that you include in the mass update definition.
Define Mass Update - Summary Page	MU_SETUP_SUMMARY	Review a detailed summary of all of the data changes that are included in the mass update definition.

Understanding Mass Update Definitions

Mass update definitions define the sets of data changes and the selected populations that the Mass Update process uses to run a mass update for a given definition. After you initiate the Mass Update process for a mass update definition, you can no longer modify the definition. Use the Define Mass Update component to define the mass update definitions. The Define Mass Update component is part of the Mass Update Manager module.

You should review mass update definitions carefully to avoid population overlap. The Mass Update process manages additional changes in sequence, processing each employee and record number combination only once. Each change overrides the previous one for the same employee and record number. Therefore, only one combination of change data within a mass update definition applies to an employee and employee record number combination during one mass update.

For example, assume that you want to change the **Department** value from *D1* to *D2* and also change the **Location** value to *L3* for all departments with *D2* value. If you define on the Additional Changes page within a single mass update definition to update the department element value to *D2* and the D2 departments to a location value of *L3,* the Mass Update process will first move employees in department D1 to department D2 and then move the employees who are already in department D2 before the update to location L3. The Employees process will not change the location of the employees with the department change. If you want the location change to apply to the whole population, you must define two mass update definitions, one for the department change and one for the location change. You must then apply the second mass update only after the first one finishes.

Define MU Page

Use the Define MU page (MU_SETUP) to select the generic information for the mass update definition.

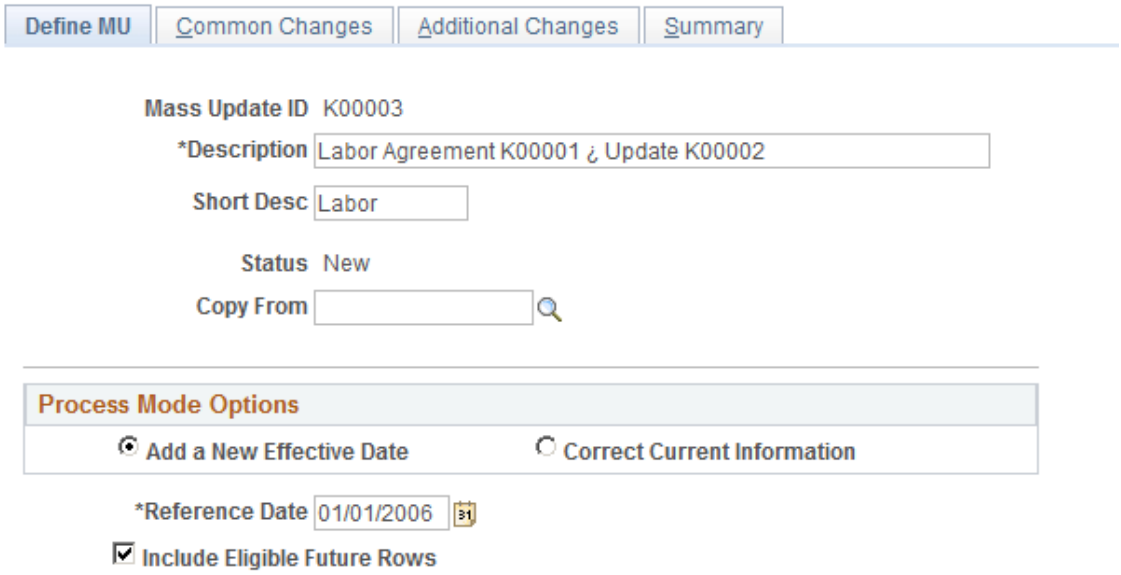
The options that you select apply to all updates that you process for this definition.

Navigation:

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Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Define Mass Update**, and then **Define MU**

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



Field or Control	Description
Mass Update ID	When adding a new mass update definition, enter a unique ID for the definition.
Description and **Short Desc** (short description)	Enter a description and short description of the mass update definition.
Status	The system displays the status of the mass update definition. Possible values are: • *New:* The mass update definition has been created and is available for the selection phase. • *Initiated:* The mass update definition has been included in a run of the selection phase. You can run the selection phases multiple times before running the update phase. • *In Progress:* The mass update definition has been included in a run of the update process phase. You can run the update phase multiple times before running the completion phase. • *Closed:* The mass update definition has been included in a completion phase and closed. You cannot run any further mass update processing. **Note:** When you initiate the update phase of the mass update processing, the mass update definition becomes display only.

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Field or Control	Description
Copy From	Select another mass update definition to use as the basis for the definition that you are defining. If you confirm the copy of the mass update definition, the system populates the Define Mass Update component with data from the other definition. When you copy a mass update definition, the system verifies whether the group builds and employees that are in the original definition are available for you to use. If not, the system issues a warning and removes the unavailable group builds and employees from the new definition. **Note:** The system overwrites all existing data that you have already included in the new definition that you are creating.

Process Mode Options

Use this group box to specify the general processing options for the mass update definition. Indicate whether you want the process to correct the current information or add a new effective-dated row. Also indicate how you want the process to handle eligible future-dated rows.

Field or Control	Description
Add a New Effective Date	Select to insert a new effective-dated row using the **Reference Date** value as the new effective date. If a record already exists with this effective date and the record contains a sequence number field, the system inserts a row with the date and a new sequence number, otherwise it overwrites data. If the record is not organized by effective sequence, overwrites data. This option inserts new information and does not override previous data.
Correct Current Information	Select to change incorrect data and override information in the person's records. The system corrects the record that is or was effective as of the **Reference Date** value that you enter.
Reference Date	Enter the data that you want the mass update processes to use when inserting a new effective-dated row or correcting an existing row.
Include Eligible Future Rows	Use this option when you want to update data of employees that are eligible for the change (as defined in population selection criteria) after the reference date. This option (similar to retroactivity) can be used in conjunction with the carry forward option available at element level.

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Common Changes Page

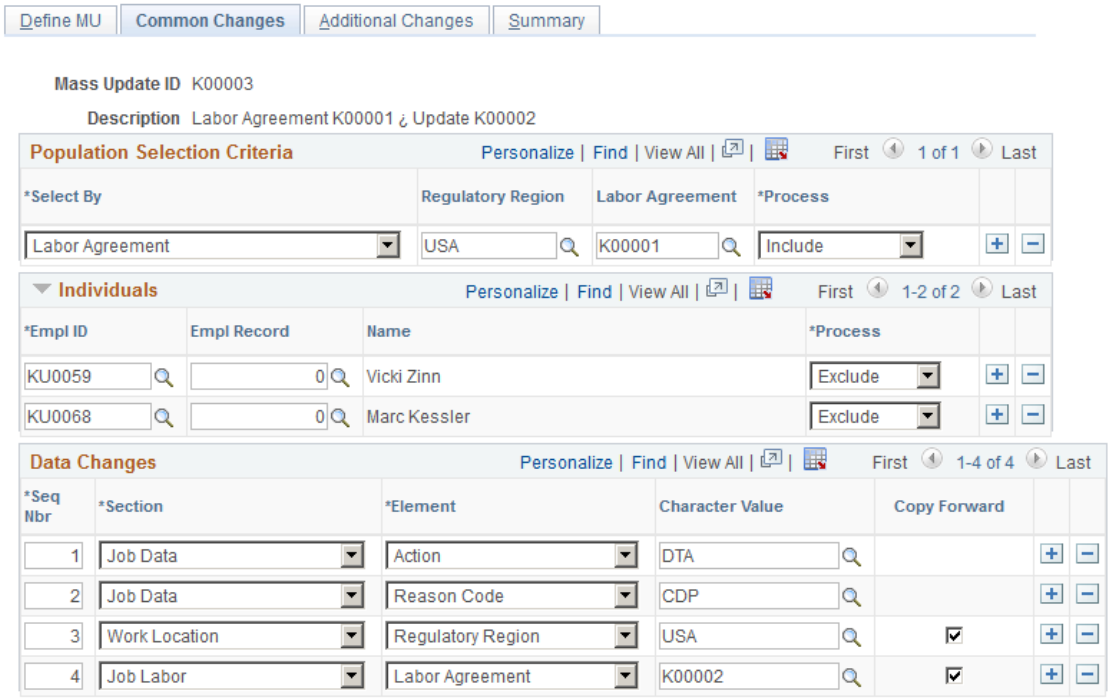
Use the Common Changes page (MU_SETUP_CHANGES) to define the content of the mass update by specifying the population selection criteria and common data changes.

To create a valid mass update definition, you must define at least one row of data on either the Common Changes page or the Additional Changes page.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Define Mass Update**, and then **Common Changes**

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



Population Selection Criteria

Use this group box to define the population selection criteria for the mass update. For each row of criteria that you define, you can select to include or exclude the associated employee population. You can combine multiple rows of criteria to refine the population selection.

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Field or Control	Description
Select By	Select how you want the system to select the employee population to include or exclude for the mass update. When you make a selection here, the system displays related fields for you to specify which value you want the process to update. For example, if you selected *Group ID,* the system displays the **Group ID** field. The update process will select all people with the group ID that you specify. **Note:** To set up mass update definitions by group, you must grant group security to the Define Mass Update component. To set up a mass update definition by department (this is also applicable for other criteria, such as business unit, company, etc... the row-level security defined in the database is applied for any selection), the user must have access to the selected department.
Boolean Value	If applicable, select this check box to indicate the Boolean value for the selected population.
From Date and **To Date**	If applicable, enter the date range for the selected population.
Business Unit	If applicable, select the business unit to which the employees in the selected population belong.
Character Value	If applicable, enter the character value for the selected population.
Regulatory Region	If applicable, select the regulatory region for the selected population.
Labor Agreement	If applicable, select the labor agreement for the selected population.
Military Service	If applicable, select the military service for the selected population.
Process	Select whether to include or exclude the selected population from the mass update.

Individuals

Use this group box to include or exclude specific employees from the mass update.

Field or Control	Description
Empl ID (employee ID)	Select the employee that you want to include or exclude from the mass update.
Empl Record (employee record number)	Select the record number of the employee that you want to include or exclude from the mass update.
Name	The system displays the name of the selected employee.
Process	Select whether to include or exclude the selected employee from the mass update.

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Data Changes

Use this group box to define which fields to update and with what values. You must enter at least one row on this page or the Additional Changes page.

You should include an action and reason code value when making changes to job data. If you do not specify an action and action reason for inserting a new effective-dated row in a person's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

Change Type	Action	Action Reason
Job Data Change	Data Change (DTA)	None

Field or Control	Description
Seq Nbr (sequence number)	Enter a numeric value to indicate the order in which you want to process the mass updates. By default, the system sets the first row to one and incrementally increases the value by one for each additional row that you insert. Some elements cannot be updated without your specifying several other related elements in the same mass update ID. For example, to specify a Location on the JOB record, you must first specify the appropriate business unit. The Business Unit element should be processed first and should have an earlier sequence number than Location. Elements that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number. The system warns you if you need to add a related or key field. **Note:** Be careful to sequence fields appropriately. Remember that the same constraints (such as defaulting and required fields) that govern a component when you access it online are also active when you update them with Mass Update.
Section	Select the section that contains the element for which you want to perform a mass update. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page.

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Field or Control	Description
Element	Select the element within the selected section for which you want to perform a mass update data change. An element refers to a field on a page. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page. Some elements require prerequisites as defined on the Configure Processor page. You must select prerequisites elements first. If you select an element that requires a prerequisite element and you have not entered a data change for the prerequisites, the system alerts you to the missing prerequisite.
Character Value	Specify the new value to which you want to change the selected element. The system displays different value fields according to the type of field for the selected element.
Copy Forward	Select to have the Mass Update process update all existing future effective-dated rows in addition to the effective-dated row that it is adding or correcting. A future effective-dated row is a row that has an effective date that is later than the reference date that you specify on the Define MU page. This option is applicable only to data that is effective-dated.

Related Topics

- Understanding PeopleSoft Security
  PeopleSoft security is based on permission lists and roles.
- Understanding Data Permission Security for HCM
  Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

Additional Changes Page

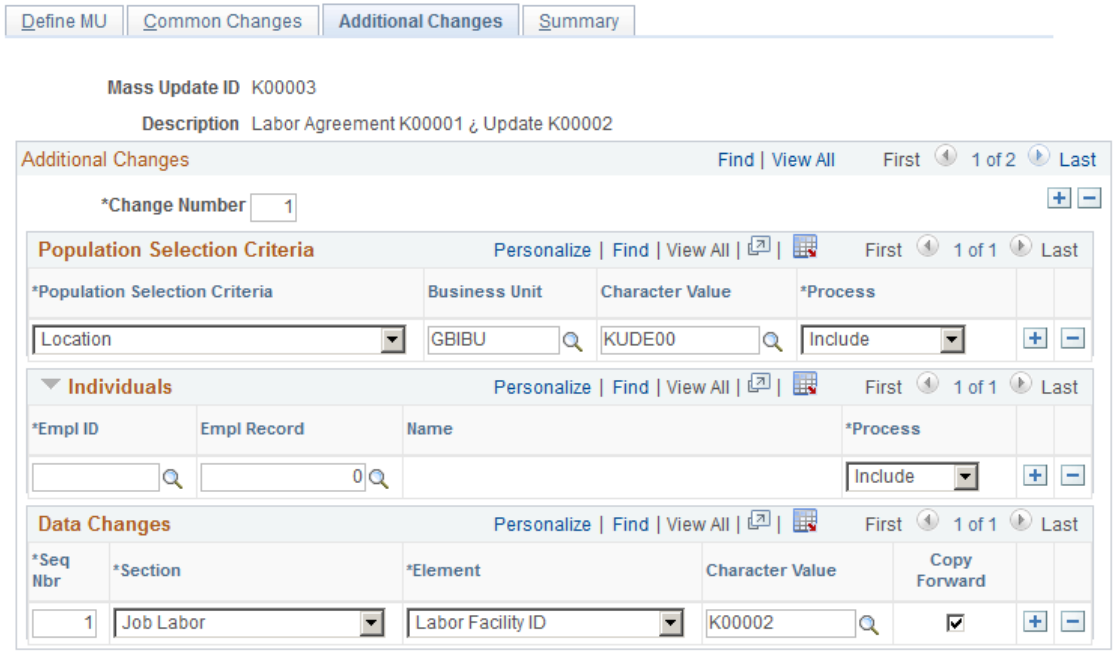
Use the Additional Changes page (MU_SETUP_ADD_CHG) to define the content of the mass update for each additional population that you include in the mass update definition.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Define Mass Update**, and then **Additional Changes**

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

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Additional changes are combined with common Changes and several combinations can be defined. While several additional changes can be entered, none of them is mandatory.

Field or Control	Description
Change Number	Enter in the **Change Number** field the order in which you want to process mass update changes for additional populations within the mass update definition. Click the **Add a new row** button to insert information for data changes to additional populations. The system automatically sets the first row to *1* and increments the value by 1 for each additional row.

> **Note**
>
> The remaining fields on this page are the same as the fields on the Common Changes page.

Creating Mass Updates

These topics provide an overview of mass update transaction creation and discuss how to generate mass update transactions.

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Page Used to Create Mass Updates

Page Name	Definition Name	Usage
Create Mass Updates Page	RUNCTL_MU	Generate mass update transactions for selected mass update definitions.

Understanding Mass Updates Creation

Use the Create Mass Updates component to perform the selection phase of mass update processing by running the Mass Update Selection Application Engine process (HR_MASS_PREP). The main role of this process is to define populations and generate transactions for each person (emplID and employee record number combination) in the population based on mass update definitions. The process assigns each transaction a unique transaction ID during the generation of transactions. It creates the content of the transactions using XML language and stores the transactions in a table that is keyed by transaction ID. Each transaction contains one set of changes for a single person and employee record number.

> **Note**
>
> The process shares this run control page with other mass update processing components.

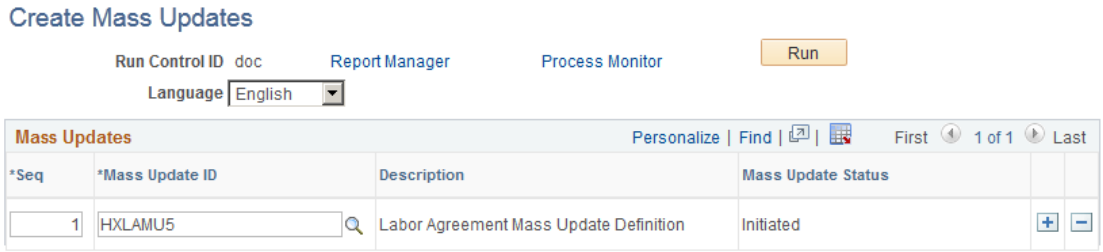
Create Mass Updates Page

Use the Create Mass Updates page (RUNCTL_MU) to generate mass update transactions for selected mass update definitions.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Create Mass Updates**, and then **Create Mass Updates**

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



Mass Updates

Enter one or more mass update definitions into the grid.

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Field or Control	Description
Seq (sequence)	Enter the sequence in which you want the process to generate mass update transactions for the mass update definitions that you specify. By default, the system sets the first row to *1* and increments the sequence by 1 for each additional row that you add. **Note:** If you are creating transactions for two or more mass update definitions at the same time, be sure to avoid population overlap between the mass update definitions.
Mass Update ID and **Description**	Select the mass update definition for which you want to generate mass update transactions. The system displays the description of the selected mass update definition.
Mass Update Status	The system displays the processing status of the selected mass update definition. Possible values are *New, Initiated, In Progress,* and *Closed.* See Setting Up Mass Update Definitions, Defining Generic Information For Mass Updates

Generating the Mass Update Report

This topic discusses how to generate the Mass Update report.

Page Used to Generate the Mass Update Report

Page Name	Definition Name	Usage
Report Mass Updates Page	RUNCTL_MU	Generate a report to review or preview transactions that are associated with specific mass update definitions.

Report Mass Updates Page

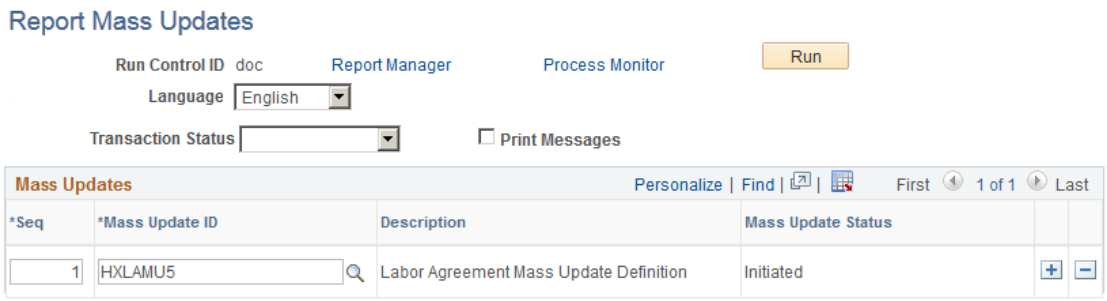
Use the Report Mass Updates page (RUNCTL_MU) to generate a report to review or preview transactions that are associated with specific mass update definitions.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Report Mass Updates**, and then **Report Mass Updates**

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

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The Mass Update SQR report (HRMASS) includes the mass update ID, description, and status. It also includes the total transactions per status and transaction details. This report is part of the Mass Update Manager module. You can run this report anytime before, during, or after the processing of the mass update transactions. When it is run before you process the mass update transactions, you can use this report as a preview.

Field or Control	Description
Language	Select the language in which you want to print the report.
Transaction Status	Select the status of the mass update transactions that you want to include in the report. Possible statuses are *Cancel, Failure, Ready, Success,* and *Warning.*
Print Messages	Select to include the details of messages and exceptions in the report.

Mass Updates

Use this group box to enter one or more mass update definitions to include in the report.

Field or Control	Description
Seq (sequence)	Indicate the order in which you want the mass update definitions to appear on the report. By default, this sets the value to *1* for the first row and increments the value by 1 for each additional row.
Mass Update ID and **Description**	Select the mass update definitions that you want to include in the report. The system displays the description of the selected definitions.
Mass Update Status	The system displays the status of the selected mass update definitions.

Managing Mass Updates

This topic discusses how to manage mass updates.

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Pages Used to Manage Mass Updates

Page Name	Definition Name	Usage
Manage Mass Updates Page	MU_MANAGE	Monitor the running instances of the Execution Manager module and manage generated mass update transactions. You can view transaction details, change their statuses, and perform the update phase of mass updates by processing transactions individually online.
Manage Mass Updates - Transaction Details Page	MU_MANAGE_DETAIL_S	Review details of the mass update transactions. This page includes high-level details of the transaction as well as information about population selection criteria, changes, eligibility, messages, and exceptions.

Manage Mass Updates Page

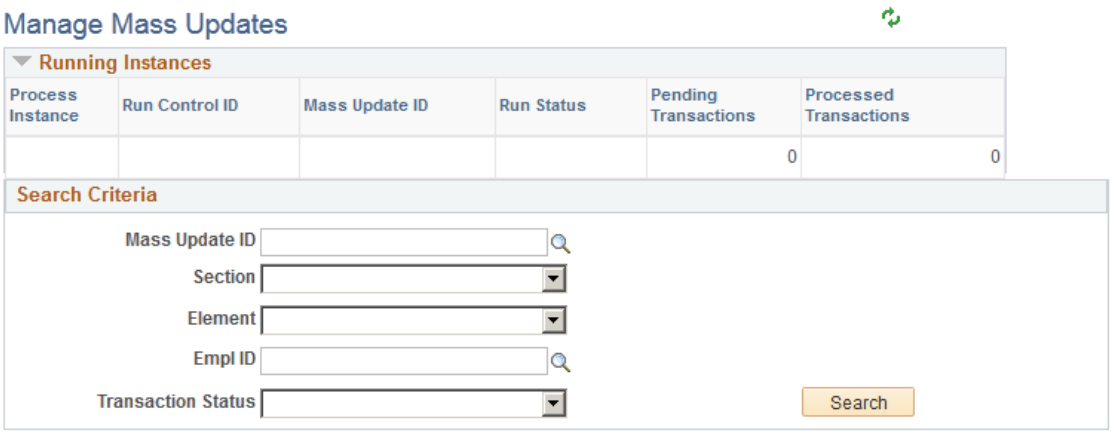
Use the Manage Mass Updates page (MU_MANAGE) to monitor the running instances of the Execution Manager module and manage generated mass update transactions.

You can view transaction details, change their statuses, and perform the update phase of mass updates by processing transactions individually online.

Navigation:

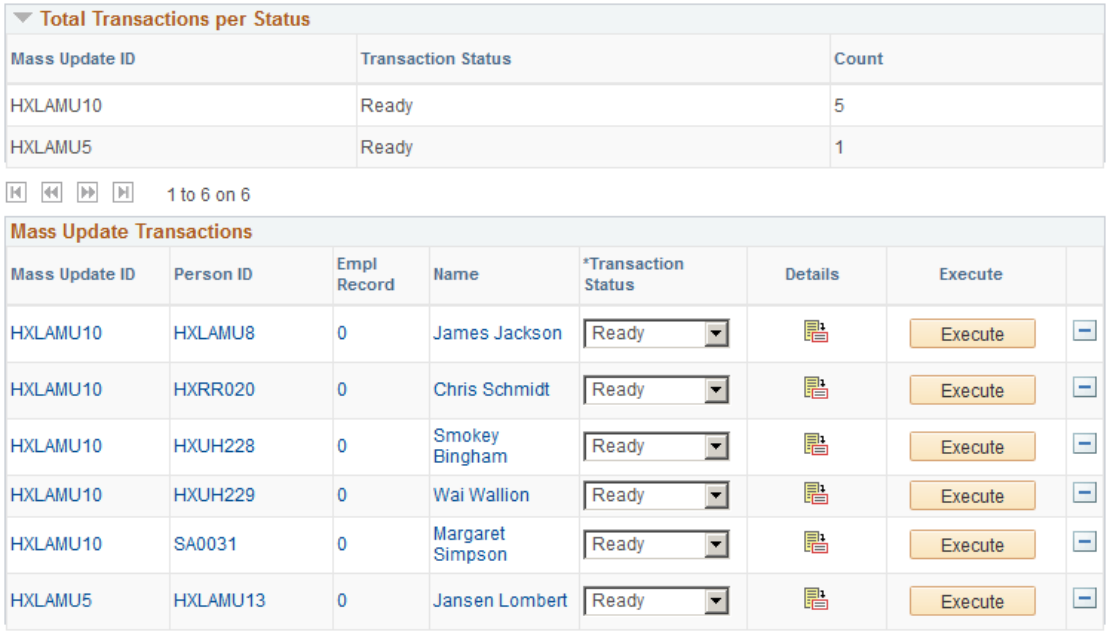
Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Manage Mass Updates**, and then **Manage Mass Updates**

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



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



Total Transactions per Status

Mass Update ID	Transaction Status	Count
HXLAMU10	Ready	5
HXLAMU5	Ready	1

1 to 6 on 6

Mass Update Transactions

Mass Update ID	Person ID	Empl Record	Name	*Transaction Status	Details	Execute
HXLAMU10	HXLAMU8	0	James Jackson	Ready		Execute
HXLAMU10	HXRR020	0	Chris Schmidt	Ready		Execute
HXLAMU10	HXUH228	0	Smokey Bingham	Ready		Execute
HXLAMU10	HXUH229	0	Wai Wallion	Ready		Execute
HXLAMU10	SA0031	0	Margaret Simpson	Ready		Execute
HXLAMU5	HXLAMU13	0	Jansen Lombert	Ready		Execute

Field or Control	Description
(refresh)	Click to reload the data on the page.

Running Instances

Use this group box to view details of the current running instances for mass update processing.

Field or Control	Description
Process Instance	Displays the process instance number for the corresponding instance.
Run Control ID	The run control ID that the instance is processing.
Mass Update ID	The mass update definition that the instance is processing.
Run Status	The run status of the process instance.
Pending Transactions	The number of mass update transactions that are assigned to the process instance but not yet processed.
Processed Transactions	The number of mass update transactions that have been processed by the process instances. This includes processed transactions with errors.

Search Criteria

Use this group box to specify search criteria for retrieving mass update transactions.

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Field or Control	Description
Mass Update ID	Select a mass update definition to narrow your search to only mass update transactions within that definition.
Section	Select a section to narrow your search to only mass update transactions that involve that section.
Element	Select an element to narrow your search to only mass update transactions that involve that element.
Empl ID (employee ID)	Select an employee to narrow your search to only mass update transactions that involve that employee.
Transaction Status	Select a transaction status to narrow your search to only the mass update transactions with that status.
Search	Click to retrieve a list of the mass update transactions that meet your search criteria. The system displays your search results in the **Mass Update Transactions** grid.

Total Transactions Per Status

Use this group box to view statistics that are related to the mass update transactions in your search results. The system displays a list of the mass update definitions in your search results, the status of each definition, and the transaction count for each definition.

Mass Update Transactions

Field or Control	Description
Mass Update	The system displays the ID for each of the mass update definitions that meet your search criteria with a separate row for each employee who has a transaction based on the definition. Click the ID to access the Define Mass Update component, where you can review the details of the mass update definition.
Person ID	The system displays the ID of the person that is involved in each of the mass update transactions that meet your search criteria. Click the **Person ID** link on a row to access the Personal Data component, where you can review the personal data record for the individual. **Note:** This link provides access to personal information, but the mass update transaction itself might not relate to personal data.

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Field or Control	Description
Empl Record (employee record number)	The system displays the employee record number of the person that is involved in each of the mass update transactions that meet your search criteria. Click the employee record number link on a row to access the Job Data component, where you can review the person's job data record. **Note:** This link provides access to job data, but the mass update transaction itself might not relate to job data.
Name	The system displays the name of the person that is involved in each of the mass update transactions that meet your search criteria. Click the name link on a row to access the personal data for the individual.

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Field or Control	Description
Transaction Status	The system displays the status of each mass update transaction. Possible values are: • *Cancel:* A user has canceled the mass update transaction. • *Failure:* The Mass Update process cannot successfully process the transaction. View messages and exceptions to details about the failure. You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed. • *Ready:* The transaction has been created during the selection phase and is ready to be processed. You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed. • *Success:* The Mass Update process has successfully processed the transaction and performed the update. • *Warning:* The transaction has been created during the selection phase and is ready to be processed. However, a conflict occurred during transaction creation. For the shown employee record number, the employee is eligible for more than one additional population. The system has assigned the employee to the latest population. You can change this status to Cancel to cancel the transaction. Note, however, that this action is irreversible after it has been processed. When you change transaction statuses and save the page, the system updates the status of the mass update definition accordingly. If all transactions for a mass update definition have a status of *Cancel* or *Success* and no transactions have a status of *Ready, Warning* or *Failure,* then the system changes the status of the mass update definition to Closed. The Mass Update process processes only transactions with a status of *Ready* or *Failure*. It does not process transactions with any other status.
Details	Click to access the Transaction Details page, where you can view details of the mass update transaction and its execution log.

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Field or Control	Description
Execute	Click this button for a row to process the corresponding mass update transaction online individually. You can process only transactions with a status of *Ready* or *Failure*. The system triggers the Transaction Processor to process the transaction. The Transaction Processor then updates the statuses of the transaction and the mass update definition. Note that processing individual transactions online is especially useful for troubleshooting.

Manage Mass Updates - Transaction Details Page

Use the Manage Mass Updates - Transaction Details page (MU_MANAGE_DETAIL_S) to review details of the mass update transactions.

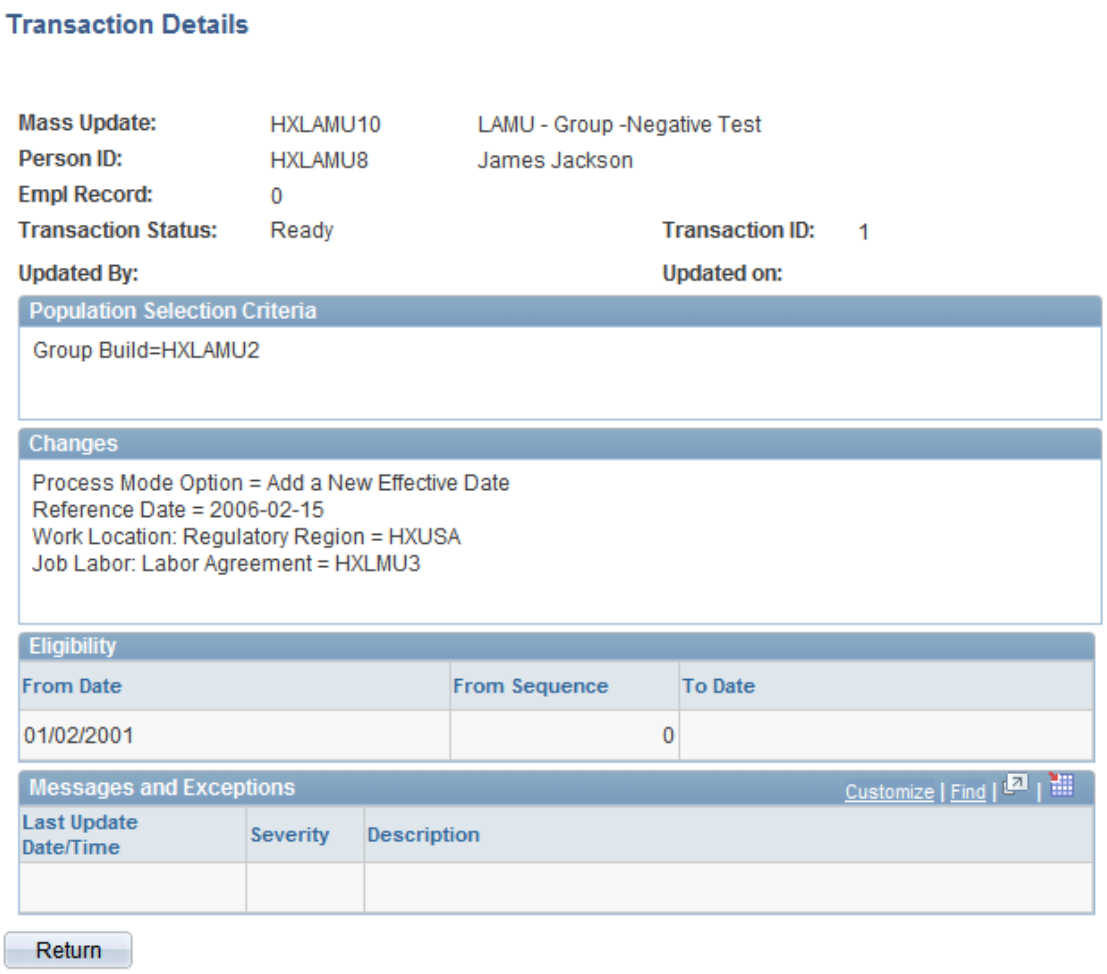
This page includes high-level details of the transaction as well as information about population selection criteria, changes, eligibility, messages, and exceptions.

Navigation:

Click the **Details** button for a row on the Manage Mass Updates page.

This example illustrates the fields and controls on the Manage Mass Updates - Transaction Details page. You can find definitions for the fields and controls later on this page.

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Population Selection Criteria

Review the population selection criteria that the system used when generating the mass update transaction. This includes criteria for common changes and additional changes.

Eligibility

Review the date range for which the transaction is eligible for the mass update.

Messages and Exceptions

Review the messages and exceptions that the Transaction Processor generated for the mass update transaction during processing. The system displays in sequence the date and time of the last update in which the Transaction Processor generated the message or exception, the severity, and the description.

Performing Mass Updates

These topics provide an overview of mass update processing and discuss how to run the Mass Update process.

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Page Used to Perform Mass Updates

Page Name	Definition Name	Usage
Execute Mass Updates Page	RUNCTL_MU	Run the Mass Update process.

Understanding Mass Update Processing

Use the Execute Mass Updates component to run the Mass Update Application engine (AE) process (HR_MASS_UPD), which processes transactions for mass updates in batch. To run this batch means of performing the update phase of mass update processing. You can also perform the batch update phase of mass update processing online through the Manage Mass Updates component.

> **Note**
>
> The Mass Update batch process (HR_MASS_UPD) supports Real Time Indexing (RTI) batch switch. This enables RTI to be switched off when heavy duty batch processes run. This feature uses PeopleTools search technology and is recommended for PeopleTools release 8.59.10 or higher.
>
> For more information about Real Time Indexing, refer to PeopleTools Search Technology, “Administering Real Time Indexing.”

The Mass Update process (HR_MASS_UPD) uses the services that are related to the data that is slated for update (that is, for job data, it uses the JOB_DATA component) and retrieves the data for each person in the group. It then assigns the new values for the people and saves the change, triggering any business rules that apply to this component. It also creates an execution result record to trace the statuses of all modifications for all people.

To run the Mass Update process, use the Execute Mass Updates run control page to specify one or more Mass Update definitions for which you want to process mass updates in batch and the sequence in which you want the Mass Update process to handle transactions for these definitions. You also can define parallel processing parameters. Parallel processing enables you to run instances of the Mass Update process in parallel to improve performance.

When you run the Mass Update process (which is triggered by the Mass Update Manager), it calls the Transaction Processor for the set of transactions to process (transactions in pending status). The Mass Update process monitors the queue of mass update transactions that are pending processing and a list of running instances until no more transactions are in the queue or until the process reaches the maximum parallel processing values that you define on the run control page.

When you run the process with parallel processing, the Mass Update Manager activates the Execution Manager by means of the Mass Update Execution AE process (HR_MASS_EXE) and uses the parallel processing parameters that you specify on the run control page. The Mass Update Execution process first creates an instance (which is called spawning). The process then assigns a chunk of transactions to that instance based on the value that you specify in the **Transactions per Instance** field and submits that instance to PeopleTools Process Scheduler for processing. As long as the instance number is less than or equal to the value that you specify in the **Maximum of Instances** field, the process spawns another instance. The process repeats these steps until it reaches the maximum allowable number of

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instances. The Mass Update Execution process is a child process of the Mass Update process.

> **Note**
>
> PeopleTools provides load balancing options on the Server Definition page, navigation **PeopleTools**, and then **Process Scheduler**, and then **Servers**, and then **Service Definition.**

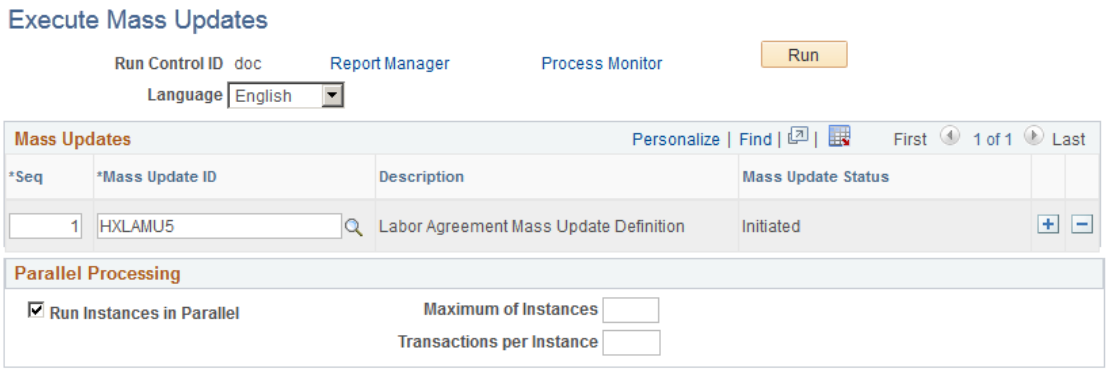
Execute Mass Updates Page

Use the Execute Mass Updates page (RUNCTL_MU) to run the Mass Update process.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Execute Mass Updates**, and then **Execute Mass Updates**

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



Mass Updates

Use this group box to select the mass update definitions for which you want to process the mass update transactions.

Field or Control	Description
Seq (sequence)	Indicates the order in which the process performs the mass update. By default, the system sets the first row to *1* and automatically increments by 1 for each additional row.
Mass Update ID and **Description**	Select the mass update definitions that you want to include in the processing. You can select only from the mass update definitions that are initiated or in progress. The system displays the description of the selected mass update definition.

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Field or Control	Description
Mass Update Status	The system displays the status of the mass update definition.

Parallel Processing

Use this group box to specify parameters for parallel processing of mass update execution instances. Note that to improve performance, you can run Mass Update processes in parallel on different hardware with no additional configuration required.

Field or Control	Description
Run Instances in Parallel	Select to enable the process to run instances in parallel. The process uses the Execution Manager to generate and monitor subprocesses (called process instances) that run in parallel on the PeopleTools Process Scheduler. Deselect this check box to run the process on a single instance on PeopleTools Process Scheduler. The process in this case commits mass updates to the database after each transaction without intervals.
Maximum of Instances	Enter the maximum number of instances that the process can generate and run in parallel. This option is available only when you have selected to run instances in parallel.
Transactions per Instance	Enter the maximum number of transactions that the process can process per instance before creating a new instance. This option is available only when you have selected to run instances in parallel.

Deleting Pending Mass Updates

This topic discusses how to delete mass updates.

Page Used to Delete Pending Mass Updates

Page Name	Definition Name	Usage
Delete Mass Updates Page	RUNCTL_MU	Delete mass update transactions that you have generated and which are pending processing.

Delete Mass Updates Page

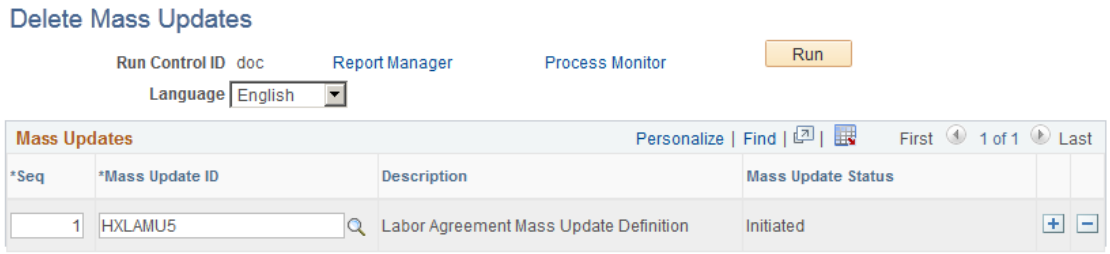
Use the Delete Mass Updates page (RUNCTL_MU) to delete mass update transactions that you have generated and which are pending processing.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Update**, and then **Delete Mass Updates**, and then **Delete Mass Updates**

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



The Mass Update Manager triggers the Mass Update Delete Application Engine (AE) process (HR_MASS_DEL) to perform the transaction deletion. The Mass Update Delete process deletes the pending mass update transactions that you have generated through the Create Mass Updates component for the selected mass update definitions. The process also performs the necessary cleanup of the system tables.

Mass Updates

Use this group box to specify the mass update definitions for which you want to delete mass update transactions.

Field or Control	Description
Seq(sequence)	Specify the order in which you want the process to delete mass update transactions. By default, the system sets the first row to *1* and automatically increments by 1 each additional row.
Mass Update ID and **Description**	Select the mass update definition that contains the mass update transactions that you want to delete. The system displays the name of the mass update definition. You can select only from mass update definitions that are initiated or in progress.
Mass Update Status	The system displays the status of the mass update definition.

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Setting Up and Working with Approvals

Understanding Approvals

Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.

Many PeopleSoft applications are delivered with predefined approval processes. However, these topics provide the PeopleSoft HCM product line specifics of the Approval Framework functionality. While this document lists the HCM navigation and additional topics specific to setting up HCM Approval Framework, more detailed overviews and field descriptions are documented in the companion documentation *PeopleSoft Approval Framework.*

> **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 Enterprise Components: Understanding Notification Composer.

Related Topics

- Approval Framework

Approvals Terminology

The following terms are important to the understanding of the approvals functionality and are used throughout these topics:

Term	Definition
Approval Process	A generic term referencing the business process of how a particular transaction is routed for approval within an organization.
Approval Framework	Engine that provides capabilities for the creation, execution, and management of approval processes.

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Term	Definition
Approval Process Definition	The definition of an approval process within the Approval Framework. The definition may contain stages, paths, steps, varying hierarchies, and criteria, among other configurable parameters.
Approval Process Definition ID (Process ID)	The ID associated with a particular approval process definition in the Approval Framework. Each transaction registered with the Approval Framework must have at least one process ID defined.
Request	A transaction that uses the Approval Framework for approval processing. For example, a promotion, transfer time off request, job requisition, and so on.
Approval Step or **Step**	A step has one or more approvers, whose actions are tracked. A step can be configured to require a set number of approvers to act, and has criteria which govern whether or not the step is to be active for the request under consideration. Steps are sequential.
Approval Path or **Path**	A path is a sequence of steps. For example, step two routes to its approvers only after step one is approved. A given approval could actually go through multiple approval paths based on some decisions. Paths can be mutually exclusive or parallel. They all converge at the final approval.
Approval Stage or **Stage**	A stage is a collection of approval paths. Approval stages come in a single sequence (stage 1, stage 2, and so on). An approval stage runs when it's immediately preceding stage finishes. When an approval stage runs, all the approval paths within it run simultaneously. The approval stage is considered complete when all approval paths within it have finished.
Approver	The person who has been determined to have the authority to approve (deny, pushback, and so on) a request.
Requester and **Originator**	The requester is the person for whom you want the Approval Framework to treat as the initiator of a request. In most cases the requester and originator are the same person. However, when using the Delegation feature the requester and originator of a request can vary. For example, if a manger delegates a transaction to a direct report and that direct report submits the transaction, the direct report is the originator and the manager is the requester.

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Term	Definition
Subject	The person for whom a transaction is being processed. For example, Karen submits to her boss, Russell, a promotion request for one of her employees, Robbin. Karen is the requester (originator), Robbin is the subject, and Russell is the approver.
Supervisor or **Manager**	The person who has management responsibilities for the requester or for an approver, as defined in your direct report settings during implementation.
Approvals Administrator or **Approval Framework Administrator**	The system administrator who is responsible for configuring, managing, troubleshooting, and maintaining approvals.
Event or **Approval Event**	The Approval Framework engine is event driven. Events are typically actions that can be taken by a user in the system, actions such as submit, approve, deny, push back, and so on.
Status or **Approval Status**	Statuses typically represent the overall state a transaction is in, such as pending, on hold, approved, denied, terminated, and so on.
Approval Criteria	Rules used to decide whether or not approval is required. Approval criteria fields and dimensions are data elements and attributes that are used to define the approval criteria.
Approval Hierarchy	The organizational hierarchy that models the actual approvals required by a transaction type (for example, approval hierarchy by supervisor or department).
User List	Collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class.
Alternate Approver or **Alternate User ID**	A user can have another user in the system as his or her alternate approver for a specified period of time. This is set on the Workflow page of the User Profile component within PeopleTools security.
Delegation	Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Approval Framework

The Approval Framework is the engine that provides the framework and capabilities for creating, running, and managing approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

Approval workflows are triggered when requesters submit a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the

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appropriate approval process definition and launches the approval workflow. A set of approvers then carry out tasks related to the transaction.

The Approval Framework enables three levels of users to develop, configure, and use transaction approvals that meet their organizational requirements. For example, the process of submitting a promotion and getting it approved requires defining who will approve the promotion, the order in which they will approve it, and how it will be routed to approvers.

In contrast to the standard PeopleSoft workflow, which requires advanced technical skills in PeopleSoft PeopleTools to create and maintain, approval workflow provides an alternative workflow that is much easier to create, configure, and maintain. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules.

Related Topics

- Approval Framework: Understanding the Approval Framework Feature
- Approval Framework: Understanding the Approval Framework Process Flow

Approvals Business Process Flow

Within the approvals business process flow:

- Application developers register information with the Approval Framework by using the Register Transactions page, where they register an application with the engine and describe its components, event handler, and records.

  As part of defining the registry, application developers create a record and table in which to store cross-reference information and set up notification templates for events. This definition determines the pending approval workflow process and tells an application which transaction is being approved or denied. Application developers also link the transaction component.

  > **Note**
  >
  > PeopleSoft Human Resources delivers many transactions that are registered with the Approval Framework. *Do not* modify these transaction registry definitions because the system requires their setup to be as delivered. For a complete list of delivered transaction registry definitions, access the Register Transactions component by navigating to **Set Up HCM**, and then **Common Definitions**, and then **Approvals**, and then **Approvals Setup Center**, and then **Register Transactions.**

- Functional business analysts define the approval process definition for an application transaction.

  The approval process definition includes setting up approval stages, paths, steps, recipients, and notifications for each approval process ID. Analysts identify the approval transaction registry entry on which to base approval process definitions and then define the details of the process.

  Functional business analysts also define or review user list definitions, email template definitions, and transaction configuration settings.

  After completing the setup, functional business analysts are responsible for maintaining and troubleshooting approval process transactions.

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- Requesters submit a transaction for approval.

  This action launches the approval process. The Approval Framework reads the approval process definition and queues the transaction for approvers.

- The system queues an approval task to an approver or reviewer using email notification, Worklist entry, or both.

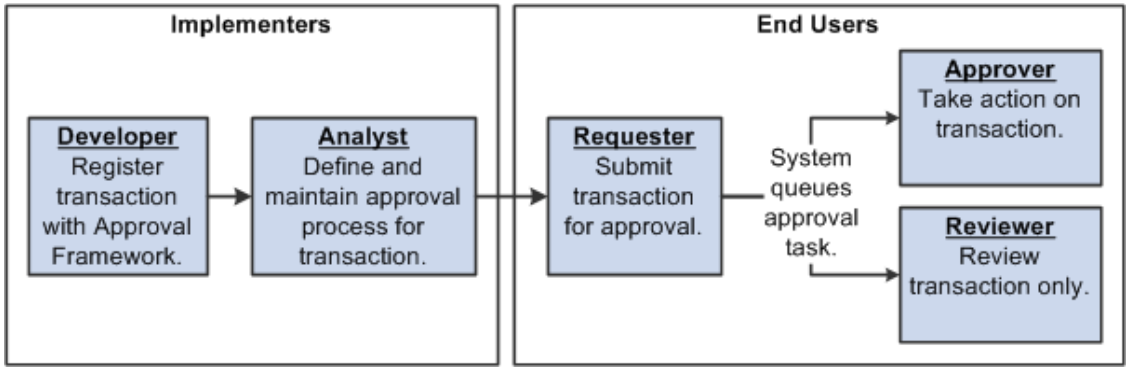
  The URL encoded in the Worklist entry points to the corresponding approval component.

- Approvers take actions on transactions.

  They can approve or deny requests, monitor transaction statuses, and audit approvals. When an error or violation of criteria or rules occurs during the approval process, the system notifies the approvals administrator, who interacts to resolve the issue.

- Reviewers view the transaction.

This diagram details the business process flow of implementing and using approvals functionality. It shows tasks that application developers, business analysts, and end users perform in conjunction with approval workflow.



Related Topics

- Approval Framework: Understanding the Approval Framework Process Flow
- Approval Framework: Understanding Transaction Approval Flows
- Approval Framework: Understanding Header- and Line-Level Approvals
- Approval Framework: Understanding Approval Features

Sources of Information

The Approval Framework is a common component that is shared across multiple PeopleSoft applications both within HCM and other product families. For the HCM product family, you'll find documentation pertaining to the Approval Framework in various locations:

- These present topics list the Approval Framework functionality that applies to the setup steps, navigation paths, and details that are specific to the HCM product family.
- Application-specific HCM documentation (such as *PeopleSoft Absence Management*) expand on all of the above texts by providing approval workflow details that relate to delivered business processes.
- The *PeopleSoft Approval Framework* describes the common Approval Framework functionality that applies to all product families.

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Before implementing, you should read all relevant sources of information to gain a complete understanding of how the pieces fit together.

See Approval Framework.

Implementation of HCM Transactions for Approval Framework

PeopleSoft delivers many approval transactions that are already configured to work with the Approval Framework. For delivered transactions, you should review the delivered transaction data within the application pages to ensure that the data fits your business processes.

To review delivered HCM transactions for use with the Approval Framework:

1. Register the approval transaction in the Approval Framework through the Register Transactions page.

   See Registering Approval Transactions.

2. Link Human Resources self-service transactions to the Approval Framework through the Workflow Transactions page.

   See Linking Workflow Transactions.

3. Set up the configuration options for the approval transaction on the Configure Transactions page.

   See Configuring Approval Transactions.

4. Set up the approval process definition through the Setup Process Definitions component.

   See Setting Up Approval Process Definitions.

   To set up the approval process definition:

   a. Define the stages, paths, and steps of the approval process definitions on the Setup Process Definitions page.

   b. Define criteria for workflow approval processes at the definition, path, and step level on the Criteria Definition page, which is accessed through links on the Setup Process Definitions page.

   c. Set up path details for workflow approval processes on the Approval Path Definition page.

   d. Define step details for approval workflow processes on the Approval Step Definition page.

   e. Define dynamic approvals through various components.

      See Defining Dynamic Approvals.

5. Create email templates for the approval transaction on the Generic Template Definition page.

   See Defining Notification Templates for Approvals.

6. Maintain user list definitions for the approval transaction on the User List Definition page.

   See Defining Users for Approvals.

7. Set up the Notification and Escalation Manager.

   See Setting Up the Notification and Escalation Manager.

8. Set up the appropriate permission lists, roles, and web libraries through PeopleTools security components.

   See Setting Up Security for Approvals.

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If you need to implement other transactions for use with the Approval Framework besides the delivered transactions, you must complete additional implementation steps. These steps include those involving object construction within PeopleTools Application Designer and those involving setup within application pages. For technical details on how to implement additional approval transactions, see the *PeopleSoft Approval Framework*

Navigating Approvals Components

PeopleSoft HCM provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

> **Note**
>
> In addition to the PeopleSoft HCM custom navigation pages, the PeopleSoft application provides menu navigation and standard navigation pages.

This topic discusses how to use the custom navigation pages to navigate in the components for approvals functionality.

Pages Used to Navigate Approvals Components

This table lists the custom navigation pages that are used to navigate in the setup and administrative components for approvals functionality:

Page Name	Navigation	Usage
Approvals Setup Center	**Set Up HCM**, and then **Common Definitions**, and then **Approvals**, and then **Approvals Setup Center**	Approval administrators and implementers can use the links on this page to access the components necessary to register and set up transactions for the Approval Framework for PeopleSoft HCM.
Approvals and Delegation	**Workforce Administration**, and then **Self Service Transactions**, and then **Approvals and Delegation**	Approval administrators can use the links on this page to access the components necessary to monitor and troubleshoot approval transactions and to maintain delegation and for PeopleSoft HCM.

Registering Approval Transactions

To register approval transactions, use the Register Transactions (EOAW_TXN) component.

These topics provide an overview of the approval transaction registry and list prerequisites.

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Page Used to Register Approval Transactions

Page Name	Definition Name	Usage
Approval Framework: Register Transactions Page	EOAW_TXN	Register approval transactions in the Approval Framework by creating a unique approval process identifier for each approval transaction. The transaction definition is the metadata that describes the transaction setup to the Approval Framework.

Understanding the Approval Transaction Registry

The approval transaction registry is the interface that developers use to register a PeopleSoft application's transaction with the Approval Framework. Using the Register Transactions page, developers define how the system interacts with portions of the application that have been defined for approvals. Transactions that require approvals are candidates for being linked to the Approval Framework. Developers can use the Register Transactions page to link the components, event handler, records, and classes that they created through PeopleTools Application Designer for an application transaction (such as a job offer or employee absence request) into the approval process. The transaction definition itself is the metadata which describes the transaction make up to the Approval Framework. In some cases, you might add a transaction or make changes to a transaction. Application developers can register the main records and components that make up the transaction, then functional business analysts can select the approval transaction on which to base the approval process definition.

Delivered Approval Transaction Process IDs

PeopleSoft HCM delivers several approval transaction process identifiers that are common across applications for use with the Approval Framework. The system uses these process IDs specifically for registering delegation-related transactions with the Approval Framework so that the approval framework, which handles the requests, can communicate back and forth with the delegations framework.

When registering approval transactions with the Approval Framework on the Register Transactions page, you must specify a header record for the approval transaction. When you are configuring these process IDs in the Configure Transactions component, you can use this header record and any of the listed fields to define additional criteria for the processing of the approval transaction. You define this additional criteria on the Criteria Definition page, which is accessible through the Configure Transactions component. Fields not listed on the Register Transactions component are not available for the criteria definition.

This table lists the approval transaction process IDs that PeopleSoft HCM applications deliver:

Process ID	Description
AM_Extended_Abs	Extended Absence
Abs Mgmt - Leave Donations	Leave Donations
AbsenceCancelation	Absence Cancelation
AbsenceManagement	Absence Management
Absence_Mgmt_ByDeptManager	Absence Management By Department Manager

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Process ID	Description
Absence_Mgmt_ByPosMgmt	Absence Management By Position Management
Absence_Mgmt_ByPosnDeptMgr	Absence Management By Position - Department Manager
Absence_Mgmt_ByPosnSupervisor	Absence Management By Position - Supervisor
Absence_Mgmt_BySupervisorId	Absence Management By Supervisor ID
AddressChange	Address Change Approval
AdhocSalaryChange	Adhoc Salary Change
ApproveCompensationProposals	Approve Compensation Proposals
Delegation	Defines delegation transactions for the Approval Framework.
DelegationBatch	Defines batch delegation transactions for the Approval Framework.
DelegationNotifyAdmin	Defines delegation transactions for the Approval Framework where the administrator gets notified.
DelegationRevoke	Defines revoked delegation transactions for the Approval Framework.
FTPTChangeEmployee	Full/Part Change Status in eProfile Manager
FederalAddrChg	Federal Address Change Transaction
FederalFTPTChange	Federal Full / Part Time Change
FederalLocationChg	Federal Employee Location Change
FederalMarChg	Federal Marital Status Change Transaction
FederalNameChg	Federal Name Change Transaction
FederalPromoteEmployee	Federal Employee Promotion
FederalReassignEmployee	Federal Employee Reassignment
FederalRetireEmployee	Federal Employee Retirement
FederalRportingChg	Federal Employee Reporting Change
FederalSeparateEmployee	Federal Employee Separation
FormApproval	Form Approval
GPCN_Payroll_Approval	Payroll result approval process
GSSAdhocSalaryChange	Guided self-service ad hoc salary change transaction
GSSDemoteEmployee	Guided self-service demotion Transaction
GSSFTPTChangeEmployee	Guided self-service change full time / part time status transaction
GSSLocationChange	Guided self-service location change transaction
GSSPromoteEmployee	Guided self-service promotion transaction
GSSReportingChgEmployee	Guided self-service reporting change transaction
GSSRetireEmployee	Guided self-service retirement transaction
GSSTerminateEmployee	Guided self-service termination transaction
GSSTransferEmployee	Guided self-service transfer transaction
JPMNonpersonProfiles	Non-person Profile

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Process ID	Description
JPMPersonProfiles	Person Profile
JobOffer	Job Offer
JobOpening	Job Opening
LocationChange	Location change
MaritalStatusChange	Marital Status Change Approval
MatrixTeam	Matrix Team
MilitaryRankChange	Military Rank Change Approval
NameChange	Name Change Approval
Payroll-Updatable W4	W4's submitted by employees
PerformanceManagement	Appraisal Transaction Approval
PromoteEmployee	Promotion Transaction Approval
ReportingChgEmployee	Reporting Change Transaction Approval
RetireEmployee	Retire employee
TLOvertimeRequest	TL Overtime Request Process ID
TLPayableTime	TL Payable Time Process ID
TLReportedTime	TL Reported Time Process ID
TerminateEmployee	Terminate Transaction Approval
TransferEmployee	Transfer Transaction Approval
BenefitsDocumentFiling	Benefits Document Filing

Note

Refer to the corresponding documentation in your application-specific documentation for information about delivered approval transaction process IDs that are specific to an application.

Note

Any PeopleSoft delivered approvals will already have the Approval Transaction Registry populated. No additional configuration is typically needed.

Prerequisites

Before registering approval transactions, you must create all of the required objects in PeopleTools Application Designer.

To complete the prerequisites for defining the approval transaction registry:

- Create a Transaction Handler Application class that extends an approved event handler class delivered by approval workflow.
- Create notification templates for the events, which include approval and denial for header and line levels.

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- Create transaction data sources, as needed.
- Create views on transaction tables that will serve as criteria sources.
- Create a view to serve as a source for ad hoc users.
- Create a view to serve as a source for approver contact information.

> **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 Enterprise Components: Understanding Notification Composer.

Related Topics

- Implementation of HCM Transactions for Approval Framework
  PeopleSoft delivers many approval transactions that are already configured to work with the Approval Framework. For delivered transactions, you should review the delivered transaction data within the application pages to ensure that the data fits your business processes.

Linking Workflow Transactions

To set up links to self-service transactions and approval functionality, use the Workflow Transactions (HCM_EO_TXN) component.

These topics list the page used to link workflow transactions and discuss how to link workflow transactions.

Page Used to Link Workflow Transactions

Page Name	Definition Name	Usage
Workflow Transactions Page	HCM_EO_TXN	Link self service transactions to the appropriate approval functionality, either the Approval Framework or the existing approval workflow functionality from previous releases. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

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Workflow Transactions Page

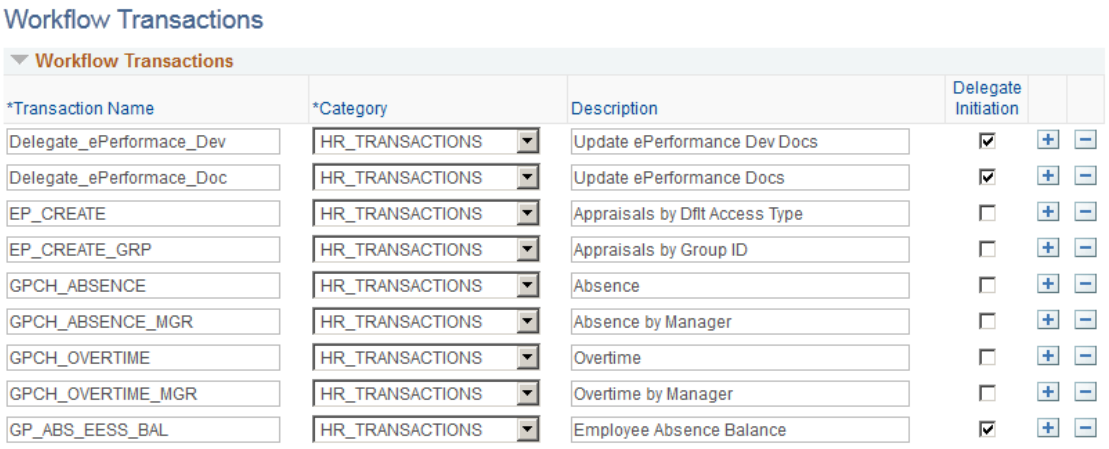
Use the Workflow Transactions page (HCM_EO_TXN) to link self service transactions to the appropriate approval functionality, either the Approval Framework or the existing approval workflow functionality from previous releases.

For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Approvals Setup Center**, and then **Workflow Transactions**, and then **Workflow Transactions**

This example illustrates the fields and controls on the Workflow Transactions page (Workflow Transactions grid). You can find definitions for the fields and controls later on this page.



The **Workflow Transactions** grid and the **Approval Workflow Engine (AWE) and Delegation Transactions** grid are mutually exclusive. You cannot register the same transaction in both grids. If attempted, the system displays an error, and you must delete one of your entries before saving the page.

Workflow Transactions

Use the **Workflow Transactions** grid to register self-service transactions that use existing workflow configuration from a previous release. For example, if the self-service transaction is currently configured to update core records upon final approval using a component interface, you can list the transaction the **Workflow Transactions** grid so that you can still leverage these configuration values.

Field or Control	Description
Transaction Name	Enter the name of the self-service transaction in either one grid or the other, not both.

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Field or Control	Description
Category	Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page. See Using Workflow with Self-Service Transactions.
Description	Enter a description of the self-service transaction.
Delegation Initiation	Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses existing approvals configuration from a previous release. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page. See Enterprise Components: Configuring Delegation Transactions.

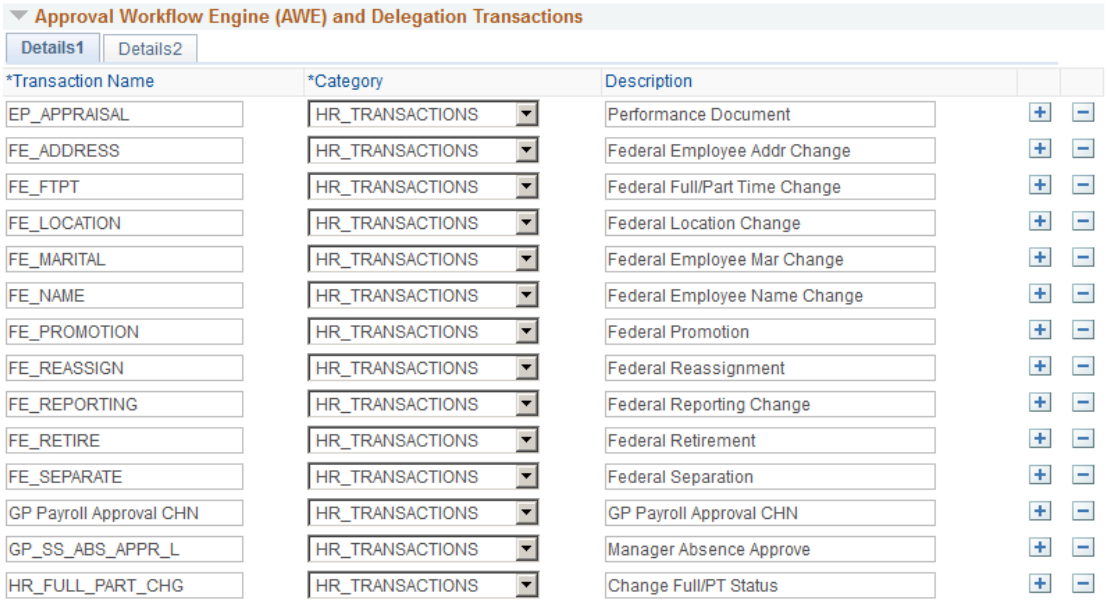
Approval Workflow Engine (AWE) and Delegation Transactions

Use the **Approval Workflow Engine (AWE) and Delegation Transactions** grid to register self-service transactions that use the Approval and Delegation framework. The data that you enter into this grid links the transaction name and accompanying tables for HCM self-service transactions to the approval process IDs that you create for these transactions on the Register Transactions page as part of the Approval Framework setup.

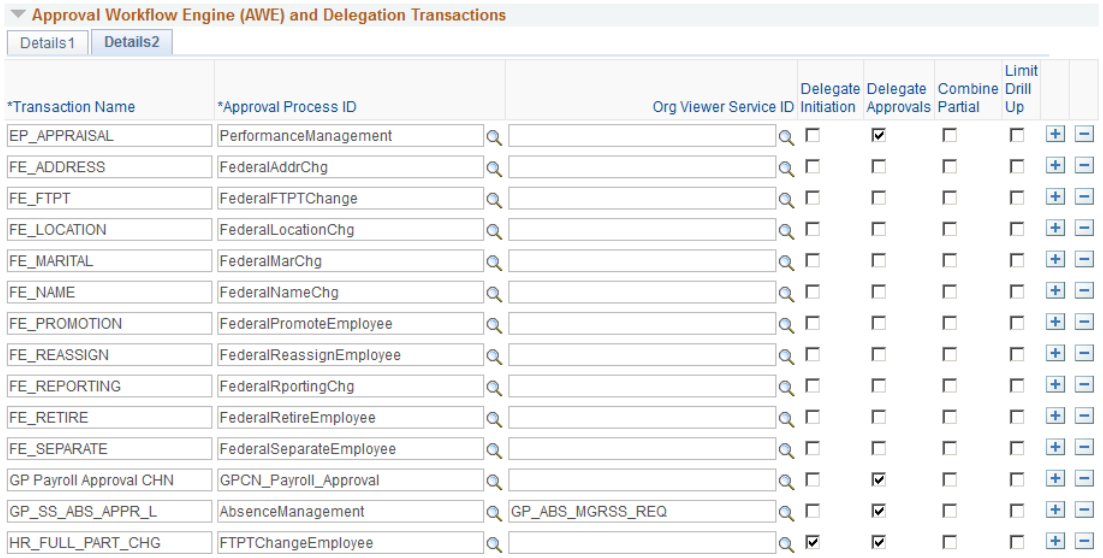
> **Note**
>
> You can only list a particular transaction once. You cannot assign the same Approval Framework transaction to multiple HR_TRANSACTIONS because this violates Delegation processing requirements.

This example illustrates the fields and controls on the Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions grid: Details1 tab). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions grid: Details2 tab). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Transaction Name	Enter the name of the self-service transaction in either one grid or the other, not both.
Category	Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page.
Description	Enter a description of the self-service transaction.

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Field or Control	Description
Approval Process ID	When implementing the Approval Framework, you define a unique transaction registry ID, called a process ID, for each of your HCM self-service transactions on the Register Transactions page. Select the approval process ID that you have defined for this self-service transaction. By creating this link between the self-service transactions and the Approval Framework, the self-service transactions can dynamically retrieve this approval process ID by transaction name and thus invoke the Approval Framework. The Approval Framework requires this parameter during processing.
Delegation Initiation	Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses the Approval Framework. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.
Delegate Approvals	Select to enable delegation of transaction approval for the corresponding self-service transaction. The transaction then becomes available for configuration as an approval-type delegation transaction. This functionality is available only for transactions that you register with the Approval Framework in the lower grid. If you select both the **Delegation Initiation** and the **Delegate Approvals** check boxes, you can configure the transaction for delegation of initiations and approvals. Configure delegation transactions on the Configure Delegation Transaction page.
Combine Partial	Select to have the system continue searching for a department manager even after it has found a partial position reports to manager. Deselect to have the system stop searching for the manager ID once it is found by one of the access types.
Limit Drill Up	Select to enable the system to continue to drill up an access type until a manager is found. Deselect this check box to allow the system to go up to the next level only.

Related Topics

- Enterprise Components: Understanding Delegation

Configuring Approval Transactions

To select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification, use the Configure Transactions (EOAW_TXN_CONFIG) component.

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For HCM transactions, the workflow engine requires that you enter specific values in the User Utilities section to enable it to interact with the Approval Framework and Delegations. In the **User Utilities Package** field, you must select the value *HCSC_USER_UTILITIES*. In the **User Utilities Path** field, you must select the value *UserUtilities*. PeopleSoft HCM delivers these values.

The user utilities class checks users against delegation to determine if the users have delegated their authority. If not, then the user utilities class determines whether the users have an alternate user in their user profiles.

The Events section defines the information to build the default URL to include in notification for each of the participants that you specify in the Notifications section.

This topic lists the page used in configuring approval transactions.

Page Used to Configure Approval Transactions

Page Name	Definition Name	Usage
Approval Framework: Configure Transactions Page	EOAW_TXN_NOTIFY	Configure how the system uses the particular implementation of approval triggers by configuring all the events and notifications associated with your approval process IDs. **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 Enterprise Components: Understanding Notification Composer.

Setting Up Approval Process Definitions

To set up approval process definitions, use the Setup Process Definitions (EOAW_PRCS) component.

Business analysts use this component to define an approval process definition. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for a transaction.

You can develop approval processes that:

- Meet organizational or tiered approval limits.
- Use alternate hierarchies, such as supervisor approval and department approval.

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- Use multiple parallel tracks, such as division and HR approvals at once.
- Use staged tracks, such as first receiving department approval and afterward receiving HR approval.

Typical approval processes might include:

- Employees or supervisors who can approve certain transactions.
- Two different approvers for each step, where both approvers at a step must approve the request for it to advance to the next step.

See Approval Framework: Defining the Setup Process Definitions Component.

These topics list the pages used to set up approval process definitions and review an example of setting up the HCM approval process definition.

Pages Used to Set Up Approval Process Definitions

Page Name	Definition Name	Usage
Approval Framework: Setup Process Definitions Page	EOAW_PRCS_MAIN	Define workflow approval process stages.
Approval Framework: Criteria Definition Page	EOAW_CRITERIA	Define criteria for workflow approval processes. Criteria definitions are used to define bits of logic that, at runtime, the Approval Framework evaluates for a Boolean result (true or false). Use this page also to define alert criteria. Alert criteria, although the same in principal as the other criteria types, is different in application. You can use alert criteria to decide when to display an alert. For example, you could decide to display a message to the approver on the Approve Transaction page if the transaction meets the specified criteria. To use this page to define alert criteria, click the Alert Criteria link on the Setup Process Definitions page. Alert criteria has two differences: • The description field is the actual alert text that appears on the approval page. • The criteria determines if an alert should appear on the approval page, as opposed to routing a line or header for approval.
Approval Framework: Approval Path Definition Page	EOAW_PATH_SEC	Set up path details for workflow approval processes.
Approval Framework: Approval Step Definition Page	EOAW_STEP_SEC	Define step details for workflow approval processes.

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Page Name	Definition Name	Usage
Copy Approval Process Page	EOAW_PRCS_COPY	Create a new approval process definition by copying the existing one. The system requires that you assign a new definition ID and effective date.
Preview Approval Page	EOAW_PRV_MON_SRC	Verify the routing of the approval process definition by previewing.

Reviewing an Example of Setting Up the HCM Approval Process Definition

This topic provides an example of how set up an approval process definition for a transaction that is specific to PeopleSoft HCM.

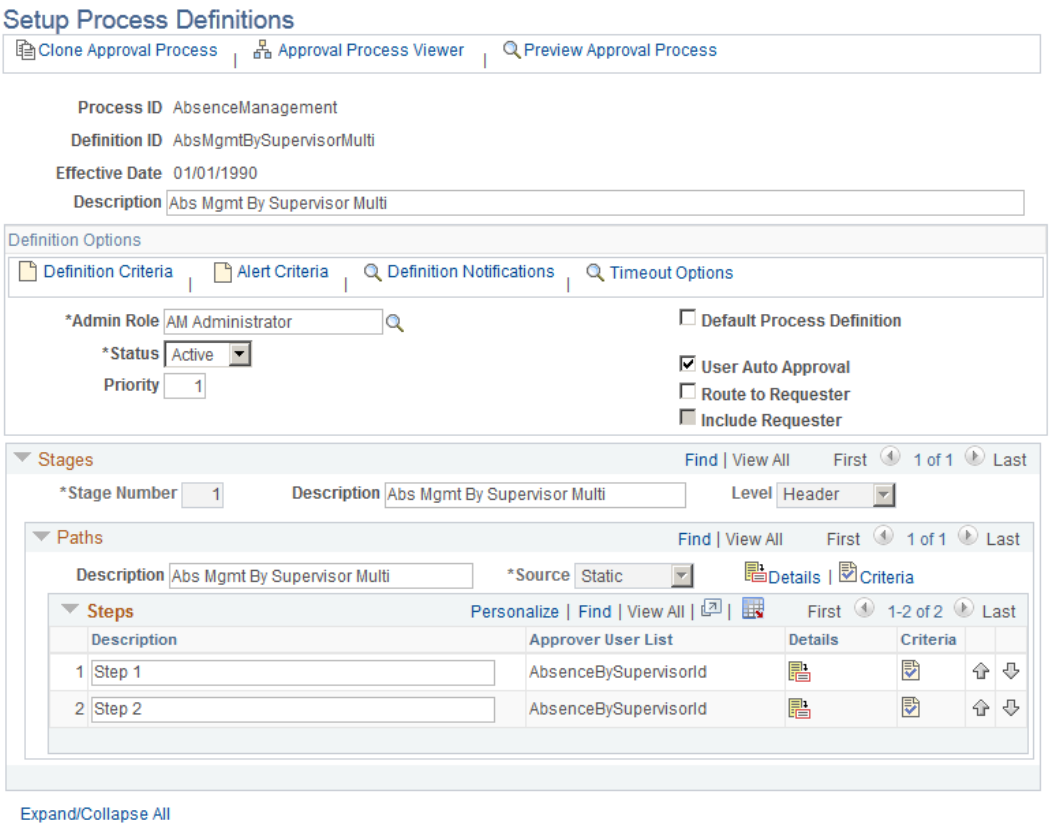
In this example, let's suppose that your company wants to create an approval process definition to handle the approval of an employee's request for a day off.

1. First you must define the stages, paths, and steps of your approval process.

   Use the Setup Process Definitions page (EOAW_PRCS_MAIN) to define workflow approval process stages.

   Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Approvals Process Setup** , and then **Setup Process Definitions**

   This example illustrates setting up an approval process definition using the Setup Process Definitions page.



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Notice in the example that the approval process contains one stage, one path, and two steps. The stage in this example contains one approval path in the organization that requires two levels of supervisor approval before the employee is granted the day off. First, the employee's supervisor must grant approval, and then that supervisor's manager must approve the request.

You can define multiple stages, paths, and steps for an approval process definition. For example, perhaps you require administrator approval of the employee's day-off request. In this case, you would create an additional path within the existing stage that contains one step requiring administrator approval.

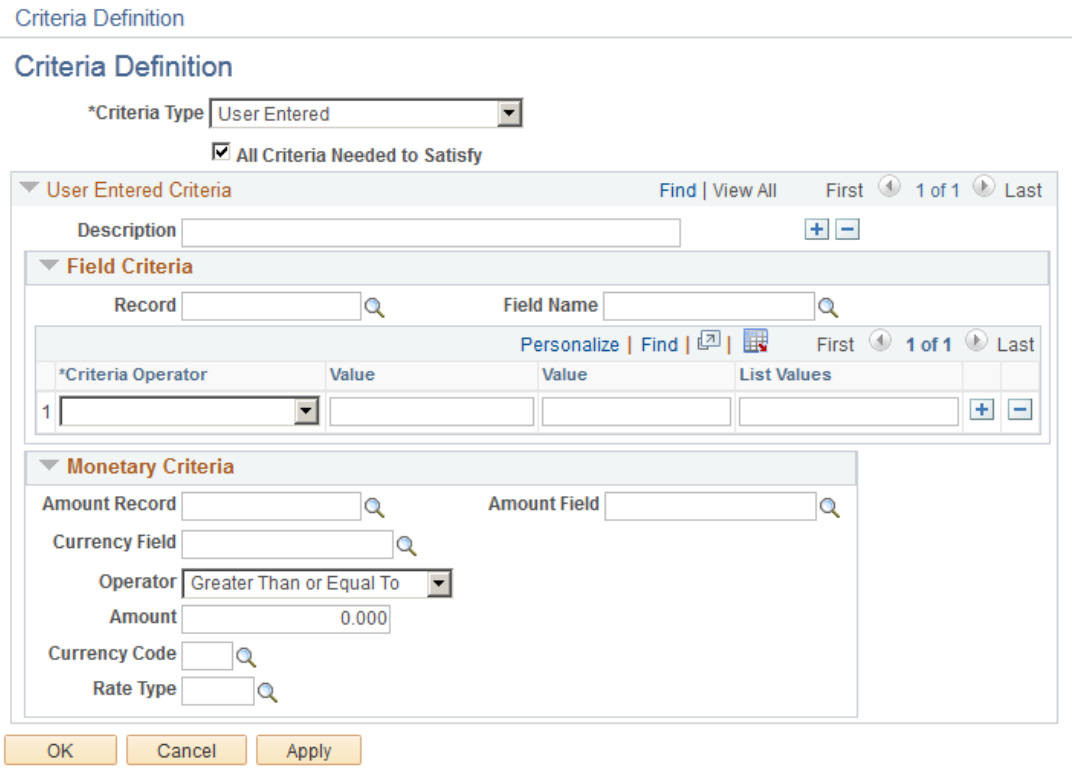
The Approval Framework processes multiple stages and steps sequentially. The engine cannot advance to the next step until you complete the preceding step in the given path. Likewise, the engine cannot advance to the next stage until you complete all paths within a given stage. For paths, however, you can define them as static (processed sequential) or dynamic (processed in parallel).

2. Now you will add logic that the Approval Framework evaluates at runtime for a Boolean result. You can define criteria at the definition, path, or step level. For this example, you want to add logic to the definition level that instructs the Approval Framework to stop processing if it encounters an absence request that is missing the employee ID value.

   Use the Criteria Definition page (EOAW_CRITERIA) to define criteria for workflow approval processes.

   - Click the **Definition Criteria** link on the Setup Process Definitions page.
   - Click the **Alert Criteria** link on the Setup Process Definitions page.
   - Click the **Criteria** link in the Path section on the Setup Process Definitions page.
   - Click the **Criteria** icon in the Steps section on the Setup Process Definitions page.

   This example illustrates defining processing criteria using the Criteria Definition page.



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Criteria definitions are used to define bits of logic that, at runtime, the Approval Framework evaluates for a Boolean result (true or false).Use this page also to define alert criteria. Alert criteria, although the same in principal as the other criteria types, is different in application. You can use alert criteria to decide when to display an alert. For example, you could decide to display a message to the approver on the Approve Transaction page if the transaction meets the specified criteria. To use this page to define alert criteria, click the Alert Criteria link on the Setup Process Definitions page. Alert criteria has two differences:

On this page you will:

a. Select the **Criteria Type** field value *User Entered.*

   This activates fields on the page that enable you to manually define your criteria.

b. Select the **All Criteria Needed to Satisfy** check box.

   The system selects this check box by default.

c. Use the **Field Criteria** group box to specify the necessary logic. In the **Record** field, select the header record for this transaction. You define header records for transactions on the Register Transactions page. In this instance, the process ID of the transaction is *AbsenceManagement,* which has a defined header record of *GP_ABS_SS_DAT.* Now choose between any of the fields that are defined within that header record for the process ID.

   In this example, *EMPLID* is selected. To complete the logic, select in the **Criteria Operator** field, the *Is Not Blank* value.

d. Click **Apply** and then **OK.**

   The logic in this criteria definition states that when processing a request for time off, the Approval Framework uses this definition ID to process any transaction related to the AbsenceManagement approval process ID that contains employee ID as part of the transaction. If the transaction does not contain an employee ID value, the Approval Framework continues to search for another definition ID that matches the required criteria needed to process the transaction for the related approval process ID.

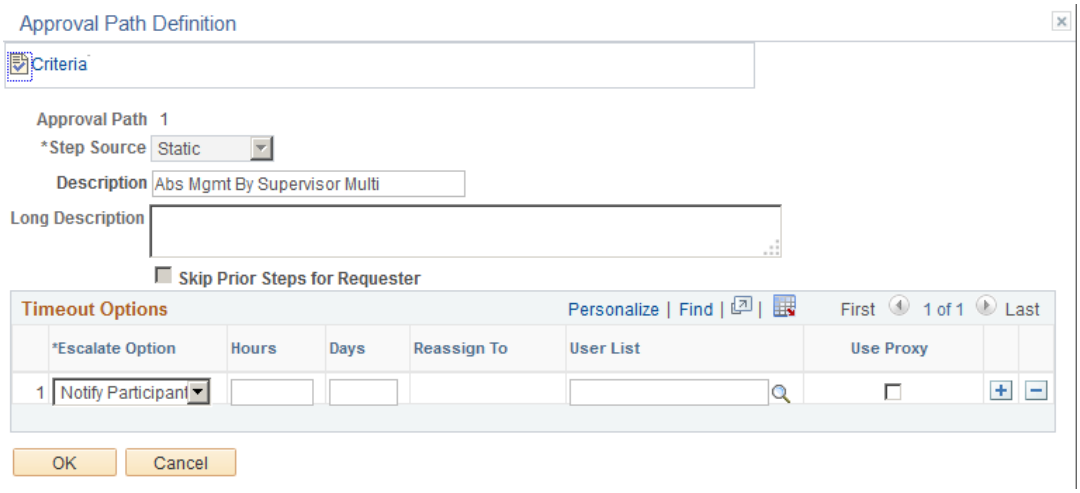
3. Next you want to require the Approval Framework to advance the approval to the next approver in the path if the current approver doesn't respond within three days. Click the **Details** link in the **Paths** group box to access the Approval Path Definition page.

   Use the Approval Path Definition page (EOAW_PATH_SEC) to set up path details for workflow approval processes.

   Click the **Details** link or icon within the **Paths** group box on the Setup Process Definitions page.

   This example illustrates specifying a timeout option of three days using the Approval Path Definition page.

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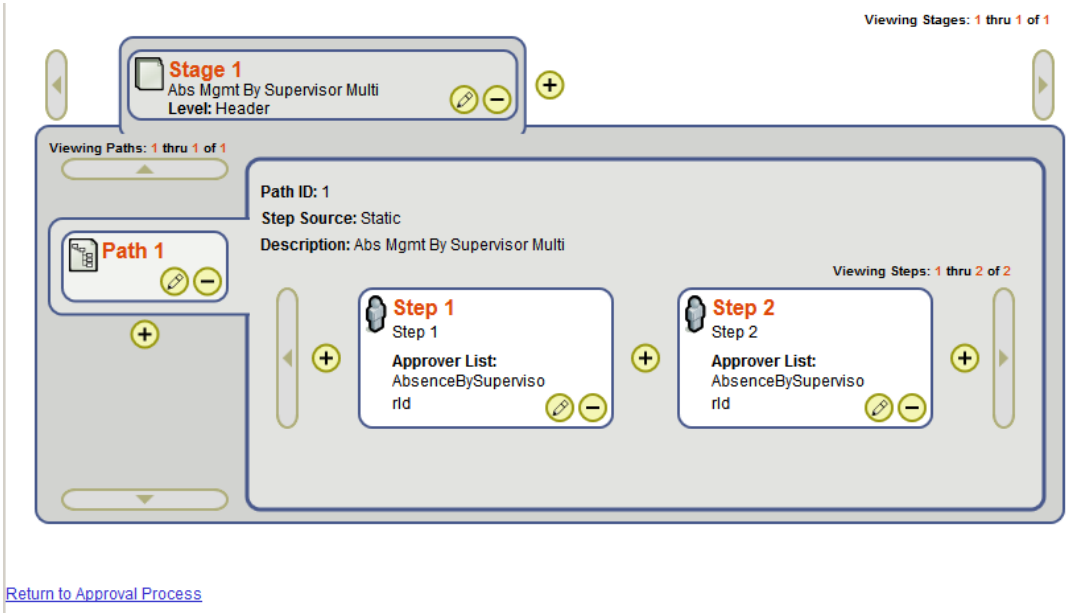
You can use the **Timeout Options** group box to define what should happen to a particular transaction or request after a certain period of time. For instance, you can notify the participant, advance the approval, or reassign the approval after a certain number of hours or days have passed. You can have the request reassigned to a particular person in the database or to a predefined user list.

To meet the needs of this example, set the **Escalate Option** field to *Advance Approval,* the **Days** field to *3,* and click **OK.**

4. Now that you have defined the approval process definition, you can look at a graphic representation.

   Click the **Approval Process Viewer** link at the top of the Setup Process Definitions page.

   This example illustrates viewing the approval process definition using the Approval Step Definition page.

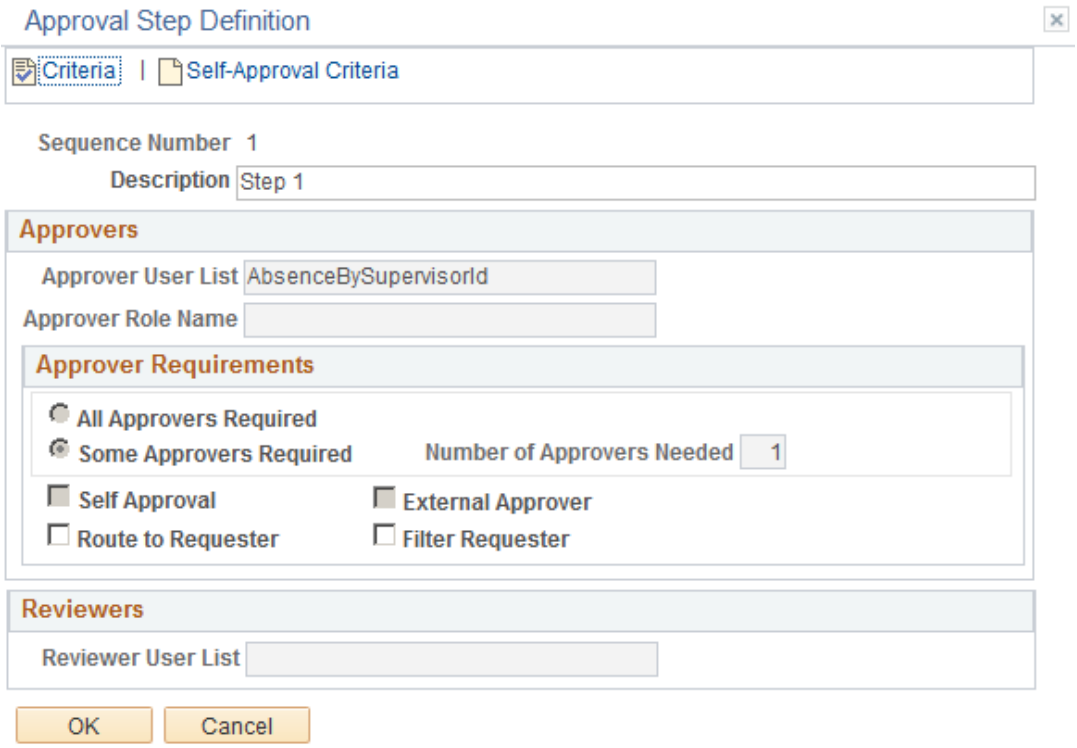


   Use the Approval Step Definition page (EOAW_STEP_SEC) to define step details for workflow approval processes.

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Click the **Details** icon within the **Steps** group box on the Setup Process Definitions page.

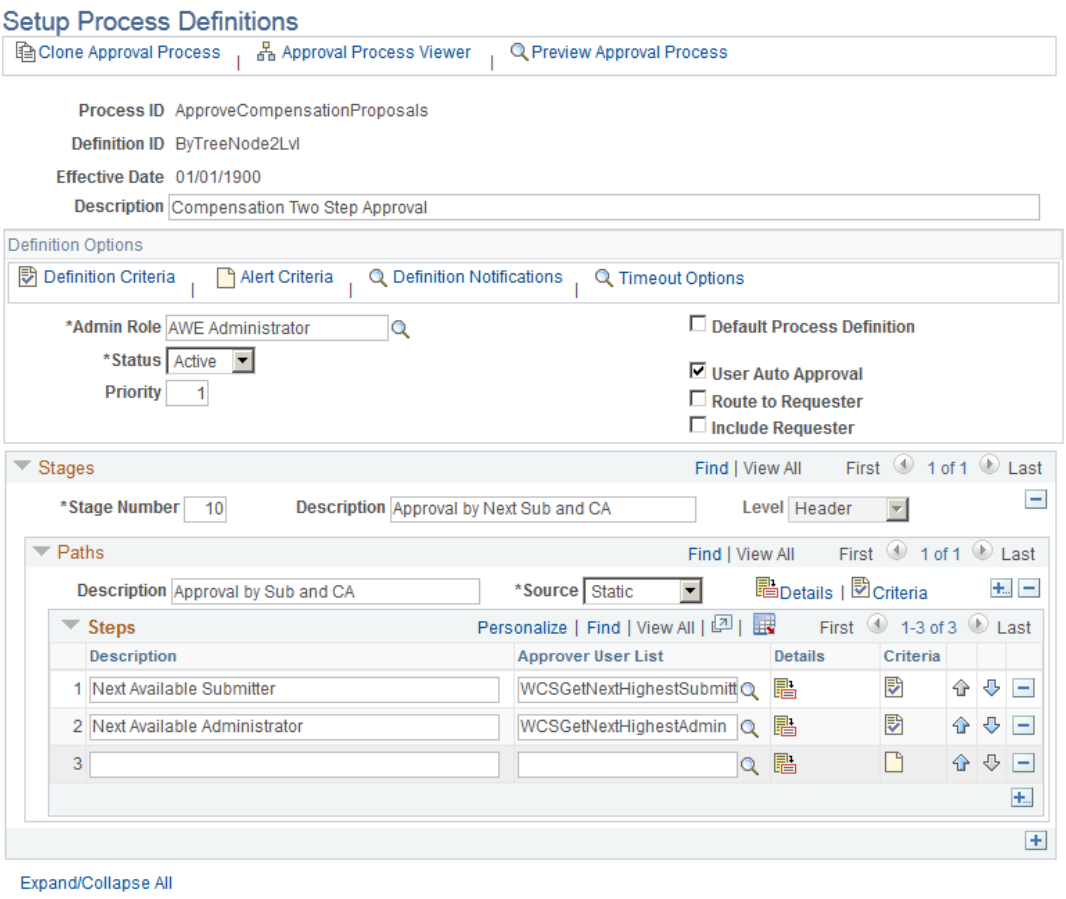
This example illustrates defining step details for workflow.



The Setup Process Definitions page enables you to view graphically your approval process definition and, if necessary, quickly modify the definition. Click the plus signs, minus signs, or correction buttons to modify steps. For example, perhaps you have decided that it is best that there is a third approval step for an absence request. Click the plus sign after step 2.

This example illustrates adding an additional step from the Approval Process Viewer page.

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The system returns you to the Setup Process Definitions page and inserts a new row after step 2 for you to enter the new step. Click **Save** when you have completed your definition.

Defining Dynamic Approvals

To set up dynamic approvals, use the Setup Process Definitions (EOAW_PRCS), Maintain User Lists (EOAW_USER_LIST), Roles (ROLEMAINT), and User Profiles (USERMAINT) components.

These topics provide an overview of how to configure dynamic approval authorizations and list the pages used to define dynamic approvals.

Pages Used to Define Dynamic Approvals

Page Name	Definition Name	Usage
Approval Framework: Approval Authorization Page	EOAW_AUTH	Authorize roles and approvers for dynamic paths.
Approval Framework: Setup Process Definitions Page	EOAW_PRCS_MAIN	Define workflow approval process stages.

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Page Name	Definition Name	Usage
Approval Framework: Criteria Definition Page	EOAW_CRITERIA	Define criteria for workflow approvals. Criteria definitions are used to define bits of logic that, at runtime, the Approval Framework evaluates for a Boolean result (true or false).
Approval Framework: Approval Path Definition Page	EOAW_PATH_SEC	Set up workflow approval path details.
Approval Framework: Approval Step Definition Page	EOAW_STEP_SEC	Define step details for approval workflow.
Approval Framework: User List Definition Page	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.
Roles - General Page	ROLEDEFN	Set up roles for workflow.
User Profile - General Page	USER_GENERAL	Set up user IDs and assign roles.

Understanding How to Configure Dynamic Approval Authorizations

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. Dynamic approvals enable you to create a single step that systematically identifies every potential approver, searches to find out if that approver has enough authority to complete the approval, and creates a visual path for users to view of all necessary approvers in the process.

To configure the dynamic approval authorization, the approvals administrator must:

1. Define user lists for dynamic authorizations through the User List Definition page.

   The Approval Framework delivers user lists that address the most common approval scenario of routing an approval to a supervisor. If the requester is an end user, his immediate supervisor cannot authorize more than 5,000.00 USD, and the job requisition is for 6,000.00 USD, then the requisition moves to the next level supervisor. The user ID for the direct supervisor is listed on the user profile.

   > **Note**
   >
   > To enable the Supervisor by User ID approval routing, you must have a supervisor assigned to your user ID for the job.

2. Create an approval authorization by authorizing roles and approvers for dynamic paths through the Approval Authorization page.

   The Approval Authorization page is available through PeopleTools but must be added to the portal navigation to render it available in the application. To add this page to portal navigation, navigate to **PeopleTools**, and then **Portal**, and then **Structure and Content.** On the displaying page, click *Set Up HCM,* then *Common Definitions,* then *Approvals,* and then the **Edit** link for the *Authorize* option. Deselect the **Hide from portal navigation**

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check box, and click **Save.** Then navigate to **PeopleTools**, and then **Portal**, and then **Portal Security Sync** and run the portal security sync process so that the portal cache recognizes the changes.

If you don't specify a definition ID, the authorization is generic. To create an approval authorization for specific definition IDs, you must add a line for each definition ID.

> **Note**
>
> If you activate self-approval on the Approval Authorization page, it replaces the self-approval on static path steps.

3. Define a dynamic approval path through the Approval Path Definition page.

> **Note**
>
> When creating criteria within the path that will trigger the workflow engine to activate, be certain that you set up the final approver as *Greater Than* so that no gaps occur.

To define a dynamic approval path:

a. Select *Dynamic* for a dynamic approval path in the **Step Source** field.

b. Select the **Notify Admin on No Approvers** check box to indicate that the approvals administrator is to be notified if the system does not find an approver for the path. This option is only available when the **Step Source** is *Dynamic.*

c. Select the **Skip Prior Steps for Requester** check box to indicate that if one of the approvers in this path is also the requester, then the system is to skip all steps in the path prior to that approver's step.

d. Select the **Check Authorization** check box to enable the approval authorization.

e. Select the **Skip Unauthorized Users** check box to enable the approval process to skip users within the user list if the system determines that they can't satisfy all of the criteria for approval.

For more information and an example of dynamic approvals see *PeopleSoft Approval Framework,* "Defining Dynamic Approvals."

See Approval Framework: Defining Dynamic Approvals.

Defining Notification Templates for Approvals

To set up notification templates for approvals, use the Generic Templates (WL_TEMPLATE_GEN) component.

These topics provide an overview of generic template definitions and list the pages used to define notification template definitions.

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> **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 Enterprise Components: Understanding Notification Composer.

Page Used to Define Notification Templates for Approvals

Page Name	Definition Name	Usage
Approval Framework: Generic Template Definition Page	WL_TEMPLATE_GEN	Enter generic template definitions.

Understanding Generic Template Definitions

Anytime that the Approval Framework triggers an email notification, it constructs the email based on the notification rules that you have set on the Configure Transactions page. The engine bases the email on the template that you specify in the **Template Name** field in the **Notifications** group box on that page.

If you are using bind variables (%1, %2, %3 and so on) in your email notification template, you must also create an SQL object through PeopleTools Application Designer. The Approval Framework uses this SQL object to populate the bind variables that you define in your notification template. You assign an SQL object to an email notification through the SQL Object identifier fields on the Configure Transactions page.

The Approval Framework reserves the %1 bind variable as a placeholder for an auto-generated link within the email notification to an application component. If you do not want to display the auto-generated link in your email notification, exclude the %1 bind from the template variables that you list on the Generic Template Definition page.

Related Topics

- Approval Framework: Defining Notification Templates for Approval Framework
- Enterprise Components: Reviewing Delivered Notification Templates for Delegation

Defining Users for Approvals

To set up users for approvals, use the User Profiles (USERMAINT) and Maintain User Lists (EOAW_USER_LIST) components.

These topics provide an overview of user lists within Approvals and list the pages used to define users for approvals.

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Pages Used to Define Users for Approvals

Page Name	Definition Name	Usage
Approval Framework: User Profiles - Roles Page	USER_ROLES	Attach workflow roles to users. A role is a class of users who perform the same type of work, such as clerks, buyers, or managers. A role describes how people fit into workflow. Role user IDs determine how to route Worklist items to users and how to track the roles that users play in the workflow.
Approval Framework: User Profiles - Workflow Page	USER_WORKFLOW	Define workflow for user profiles. Use this page to define alternate users who are part of the workflow process. You can define alternate users to handle approvals during the absence of the primary approver and supervisor. Refer to the *Setting Up and Working With Delegation* topics if you are using the Delegation functionality and want to use the alternate user ID.
Approval Framework: User List Definition Page	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.

Understanding User Lists within Approvals

A *user list* is a collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class. User lists are used to represent the business process of your approval hierarchy on a transaction-by-transaction basis. PeopleSoft delivers pre-defined user lists. If none of the delivered user lists apply to your organization's hierarchy, then you can define your own using the Maintain User Lists component.

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> **Note**
>
> The delivered user lists for HCM approvals are designed to be used for routing approvals; they are not for notifications or escalations. Organizations will need to create their own user lists for notification purposes.

Delivered User Lists for HCM for Approvals

PeopleSoft HCM delivers the following common user lists for use with the Approval Framework:

User List	Description
By Department Manager	Uses the **Manager ID** field from the Department Profile page.
By Partial Pos Mgmt - Dept Mgr	Uses the **Reports To** field from the Job Information page and then the **Manager ID** field for that position and department from the Department Profile page.
By Partial Pos Mgmt - Suprvsor	Uses the **Reports To** field from the Job Information page and then the **Supervisor ID** field for that position from the same page.
By Position Management	Uses the **Reports To** field from the Job Information page.
By Supervisor ID	Uses the **Supervisor ID** field from the Job Information page.

> **Note**
>
> Refer to the corresponding documentation in your application-specific documentation for information about delivered user lists that are specific to an application.

Multiple Jobs and User Lists

PeopleSoft HCM delivers a series of user lists, or approval hierarchies, based on application class that is designed specifically for receiving and passing employee job information. These user lists correspond to the roles within an organization and enable you to select which job the Approval Framework uses to route approvals for employees with multiple jobs.

If an employee with multiple jobs encounters a job-related transaction during self-service approvals processing, the system prompts the employee to select the job for which she or he wants to process the transaction. For multiple job capability, the delivered user lists use an Application Class as the source for the user list, with the value of the **Root Package ID** field set to *HCSC_USERLIST_UTILS* and one of the following delivered Application Class Path values:

Application Class Path	Related User List Definition
HCSC_USERLISTS:GetApproversByPositionMgmt	By Position Management
HCSC_USERLISTS:GetApproversByDeptManager	By Department Manager

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Application Class Path	Related User List Definition
HCSC_USERLISTS:GetApproversByPosnDeptMgr	By Partial Pos Mgmt - Dept Mgr
HCSC_USERLISTS:GetApproversByPosnSupervisor	By Partial Pos Mgmt - Suprvsor
HCSC_USERLISTS:GetApproversBySupervisorId	By Supervisor ID

The delivered user lists correspond with different access types that PeopleSoft Human Resources delivers with direct reports functionality. The system uses each of these delivered user lists in correspondence with how you define your direct report structure (by supervisor, by department, and so on).

If you define a custom user list and want multiple job capability, then you must use these same application root package ID and application class path values. PeopleSoft HCM supports multiple job capability *only* in the predefined user lists that we deliver.

> **Note**
>
> PeopleSoft HCM *does not* support multiple job capability for these custom user lists.

See *PeopleTools: PeopleCode Developer's Guide*.

Setting Up the Notification and Escalation Manager

To set up notification and escalation, use the Define Event Types (EOAW_NEM_EVENTS), Define Events (EOAW_NEM), Event Status (EOAW_NEM_STATUS), and Schedule JobSet Definition (SCHDLDEFN) components.

These topics provide an overview of notification and escalation, list the pages used to set up the Notification and Escalation manager, and discuss how to view event statuses.

Pages Used to Set Up the Notification and Escalation Manager

Page Name	Definition Name	Usage
Approval Framework: Event Type Page	EOAW_NEM_EVENTS	Associate events to a server.
Approval Framework: Notification and Escalations Page	EOAW_NEM_SETUP	Set up an escalation event and define the evaluation and action details.
Event Status Page	EOAW_NEM_STATUS	View the status of an event.
Approval Framework: Escalations Calendar Setup page	EOAW_CALENDAR	Define a custom calendar which can be used to define the timeout options in the Approval Process Setup page.

Understanding Notification and Escalation

Notification and Escalation Manager (NEM) is a mechanism used to process notifications and escalations on a specified interval.

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For example, escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. You can specify the time period (timeout) and you can specify alternate approvers to whom to notify and escalate the approval for further action. Timeout options are defined on the Approval Path Definition 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 47 or later must use Notification Composer.
>
> For more information about Notification Composer Framework, see Enterprise Components: Understanding Notification Composer.

Event Status Page

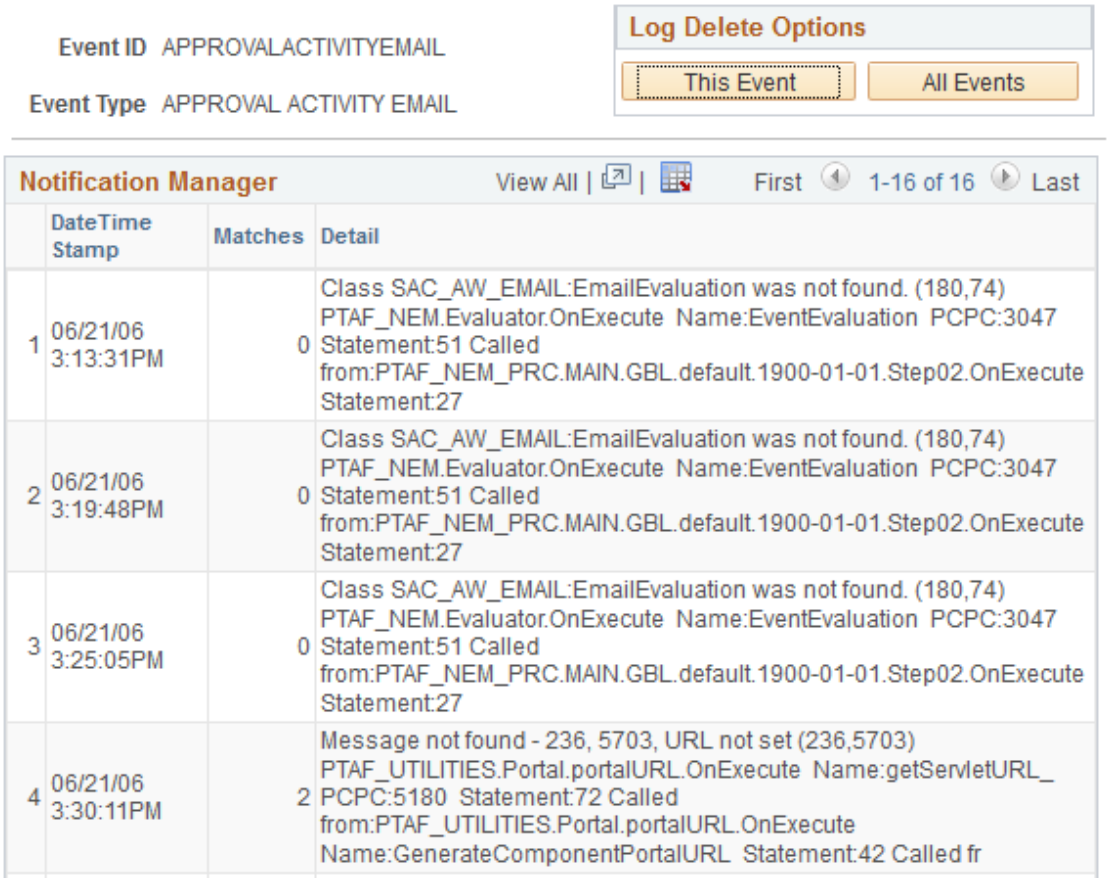
Use the Event Status page (EOAW_NEM_STATUS) to view the status of an event.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Notification and Escalation**, and then **Event Status**, and then **Event Status**

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

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Log Delete Options

Field or Control	Description
This Event	Click to delete all notification event logs for the event ID that you selected.
All Events	Click to delete all notification event logs for all events.

Notification Manager

Field or Control	Description
DateTime Stamp	Used in the Status record to track the results of each instance run.
Matches	Displays the number of rows that are returned from a row set.
Detail	Displays detailed status messages for each notification event.

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Setting Up Security for Approvals

After you define all necessary objects in PeopleTools Application Designer and complete the required setup in the application components, you must ensure the proper setup of the applicable permissions lists, roles, and web libraries.

This table describes the delivered permission lists for the approval framework:

Permission List Name	Description	Roles Attached To
HCCPSCAW1010	This is the approvals administrator permissions list. It grants permissions for Approval Framework administration and configuration objects. These objects include all components under the menu path **Set Up HCM**, and then **Common Definitions**, and then **Approvals.** PeopleSoft delivers this list already attached to the Approval Framework administrator role. You should also attach this permission list to any existing, application-specific administrator roles in your organization for which you want the administrators to inherit this permission list.	Approval Framework administrator
HCCPSCAW1020	This is the manager permissions list. It grants permissions for Approval Framework manager objects. These objects include several manger-specific self-service pages. PeopleSoft delivers this list already attached to the manager role. Any of your application-specific users who are considered managers and have the manager role assigned to them will automatically inherit this permission list.	Manager

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Permission List Name	Description	Roles Attached To
HCCPSCAW1030	This is the employee permissions list. It grants permissions for Approval Framework employee objects. These objects include several employee-specific self-service pages. PeopleSoft delivers this list already attached to the employee role. Any of your application-specific users who are considered employees and have the employee role assigned to them will automatically inherit this permission list.	Employee

PeopleSoft HCM delivers the AWE Administrator role. This role already has the HCCPSCAW1010 permission list assigned to it. However, this role is not attached to any users as delivered. If you *do not* have an application-specific administrator role, then you can use this role by attaching it to any application-specific administrator users that you have. If you *do* have an application-specific administrator roles within your organization, then PeopleSoft recommends that you simply attach the HCCPSCAW1010 permission list to that role.

To enable users to view additional information about Approval Framework participants through the approvals status monitor, you must assign users the correct permissions. Because of the manner in which the system displays the approvals status monitor, you must also grant access to the WEBLIB_PTAF web library for the appropriate product permission lists. Also, for users to be able to use the EMC functionality that is part of the Approval Framework, you must grant permission lists full access to the WEBLIB_EOAW web library. PeopleSoft HCM delivers these two web libraries as part of the delivered Approval Framework permission lists.

To grant permission lists access to web libraries:

1. Navigate to **PeopleTools**, and then **Security**, and then **Permissions & Roles. Permission Lists.**
2. Select the permission list for which you want to grant access to web libraries.
3. On the Web Libraries page, insert a new row for the web libraries WEBLIB_PTAF and WEBLIB_EOAW.
4. For each web library, click the **Edit** link.

   The system displays the Weblib Permissions page.
5. Click the **Full Access (All)** button to grant access to all functions, or complete the **Access Permissions** field to grant access to specific script functions.
6. Click **OK.**
7. Save the permission list.

> **Note**
>
> The Approval Framework assumes each person in the system has one valid operator ID. If you are using the approval process and allow your employees to have more than one operator ID, make sure they have the same roles and permission lists.

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See *PeopleTools: Security Administration*.

Administering Approvals

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

> **Note**
>
> Guided self-service transactions are read-only on the Monitor Approvals page. To perform a final administrative approval for a guided self-service transaction, use the Guided Self Service Requests page instead.

This topic provide overviews of approvals administration and discusses how to administer approvals.

Pages Used to Administer Approvals

Page Name	Definition Name	Usage
Monitor Approvals Page	EOAW_ADM_MON_SRC	Approvals administrators can search on approval processes and perform mass reassignments.
Monitor Approvals - Approval Framework: Monitor Approvals Page	EOAW_ADM_MON_ACT	Approvals administrators can perform actions on a specific approval process. On this page, administrators can view guided self-service transactions in read-only mode, but they cannot take action on the transactions.
Guided Self Service Requests – <Transaction Name> Page	WF_MSS_CT_EE	Approvals administrators can view and act on approval transaction where the request was originally submitted using guided self-service.

Related Topics

- (USF) Reviewing Federal Self-Service Transactions
  This topic provides an overview of federal self-service transactions and discusses how to review federal self service transactions.

Understanding Approvals Administration

The Administer Approvals component gives approvals administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

Actions available for the approvals administrator are:

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Term	Definition
Reassignment	Allows the approvals administrator to reassign pending approvals to a new approver based on search criteria.
Approve	Allows the approvals administrator to act on behalf of the assigned approver. The approval is initiated for a specific user, wherever that user may be pending within a specific transaction. Once the administrator takes action, the approval resumes the approval process.
Denial	Allows the approvals administrator to act on behalf of the assigned approver. The denial is initiated for a specific user, wherever that user may be pending within a specific transaction.
Ad Hoc	Allows the approvals administrator to add a reviewer or approver to a specific transaction in serial or parallel with existing approvers. For serial approvals, each approval in the process is sequential. Users can add approvers and reviewers only after the current pending step or later. For parallel approvals, the sequence does not matter. Users can insert an ad hoc step in an ad hoc path in any currently pending or subsequent stage. The approvals administrator can add or remove ad hoc approvers once the transaction is submitted. The Approval Framework launches the previewed approval process instance if requested by the application developer's code. If you have an ad hoc approver user list defined on the Configure Transactions page, only the users within that list can be added as an ad hoc approver or reviewer.

Source End Actions

When a request is approved, the engine notifies the application, which then takes source end actions:

- End actions.

  An approval of one transaction often leads to the creation of another transaction, or triggers another business process. The Approval Framework supports this trigger by providing a call-back mechanism for event notification. For example, when a promotion is approved, it can be sourced—an action follows final approval, which is the end action.

- Line-level versus header-level end actions.

  Use line-level approvals to make it possible for an action to be taken on different line items upon their approval, without waiting for the approval of other line items in the transaction. You can source line items as soon as they are approved.

  This action is possible only if line-level approval routings are at the end of the process and require no further review. In this case, the application can act on the individual lines as they get approved. The Approval Framework notifies the application of significant approval-related events.

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Header actions allow the transaction lines to be grouped together and processed as one unit.

> **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 Enterprise Components: Understanding Notification Composer.

Approval Reassignment

You can reassign pending tasks to another approver, or an administrator can reassign all tasks that belong to a specific approver to another approver. Use reassignment in the following situations:

- The approver chooses to redirect the task to another approver, thus delegating a specific task (step) to another approver.
- The approvals administrator decides to reassign all pending tasks within a step that belong to an approver to another approver.

  This reassignment usually occurs when an approver is unexpectedly absent and the approvals administrator reassigns all pending tasks to another.

When you redirect a workflow task to another approver, you can modify the approval process map.

> **Note**
>
> The Approval Framework is set up for administrative reassignment and escalations only.

Monitor Approvals Page

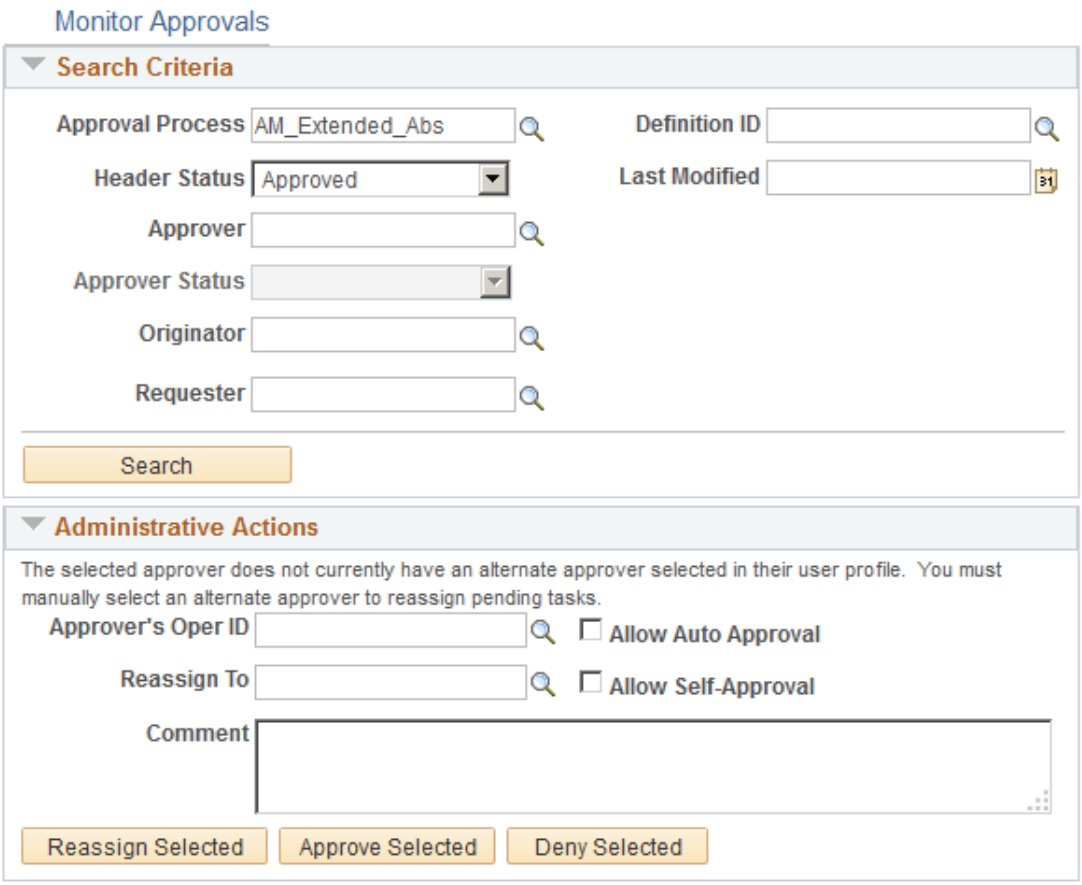
Use the Monitor Approvals page (EOAW_ADM_MON_SRC) to search on approval processes and perform mass reassignments.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Approvals and Delegation**, and then **Monitor Approvals**, and then **Monitor Approvals**

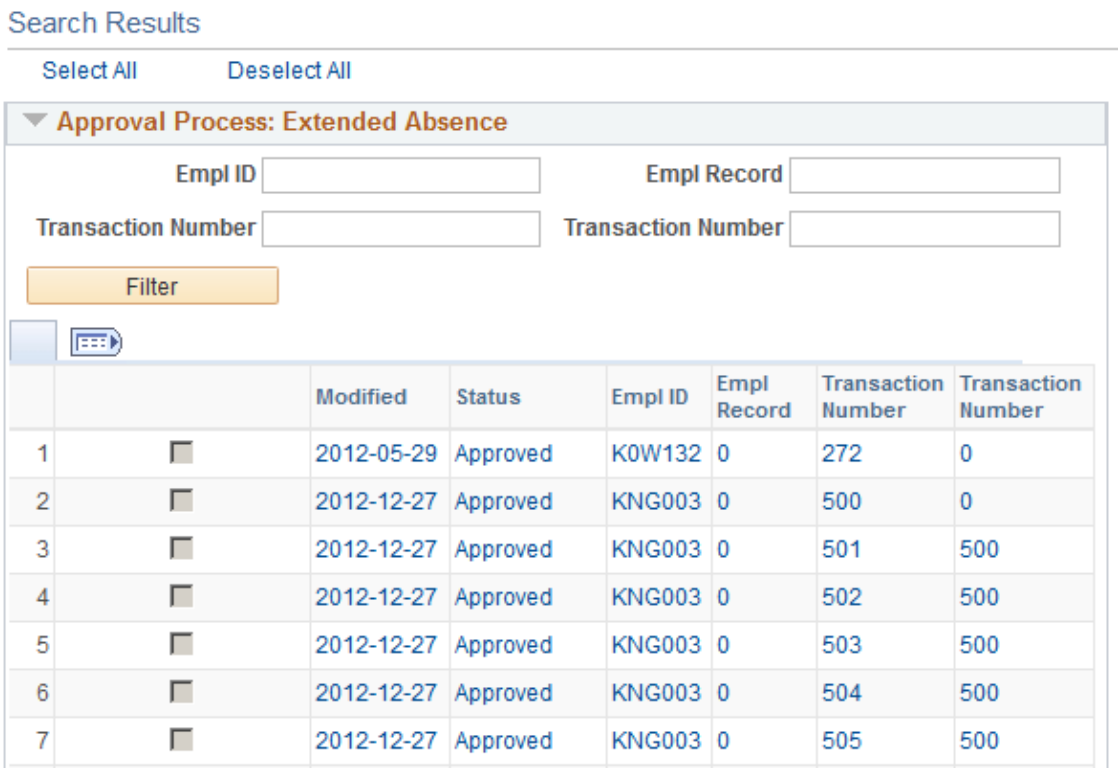
This example illustrates the fields and controls on the Monitor Approvals page (1 of 2). You can find definitions for the fields and controls later on this page.

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

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For a complete description of this page, see *PeopleSoft Approval Framework,* "Using the Approval Monitor."

See Approval Framework: Using the Approval Monitor.

Administrative Actions

Field or Control	Description
Approver's Oper ID (approver's operator ID)	Select the operator ID of the approver to whom the approval transaction is assigned.
Reassign To	Select the operator ID of the person to whom you want to reassign approval transactions for the specified approver in the **Approver's Oper ID** field.
Allow Auto Approval	Select to allow auto approval of approval transactions that are assigned to the specified approver.
Allow Self-Approval	Select to allow the specified approver to approve transactions on their own behalf.
Comment	Enter a comment to describe the mass reassignment. The comment becomes part of the transaction itself.
Reassign Selected	Click to reassign the approval transactions from approver in the **Approver's Oper ID** field to the person specified in the **Reassign To** field. The system reassigns only the approval transactions that you have selected in the search results.

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Search Results

The system displays a unique section for each approval process that has approval transactions meeting your search criteria. Each section contains key fields that are unique to the specific approval process. You can filter your search results within a section by specifying key values and clicking the **Filter** button.

Field or Control	Description
Select All	Click to select all approval transactions that are listed in your search results.
Deselect All	Click to clear the selection of all transactions in your search results.
Filter	Specify key values and then click the **Filter** button to narrow your search results within an approval process section.
Modified	The system displays the date when the approval transaction was last modified. If the approval transaction has never been modified, the system displays *Never*.
Status	The system displays the status of the approval transaction: *Pending, Denied, Terminated,* or *Approved.*
<Key Values>	The system displays key values for each of the approval transactions that meet your search criteria. Key values vary depending on the approval process.

Related Topics

- Approval Framework: Monitor Approvals Page

Guided Self Service Requests – <Transaction Name> Page

Use the Guided Self Service Requests – <Transaction Name> Page (WF_MSS_CT_EE) to perform an administrator action on a transaction that was originally submitted using guided self-service. The page name varies depending on the transaction.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Guided Self Service Requests**

For complete documentation for this page, see PeopleSoft eProfile Manager Desktop: Approving Guided Self-Service Transactions.

Generating an Approvals Audit Report

These topics provide an overview of the Approvals audit report, list the page used to run the Approvals Audit Report, and discuss how to generate an approvals audit report.

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Page Used to Run the Approvals Audit Report

Page Name	Definition Name	Usage
Approvals Audit Report Page	HCSCAWE_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.

Understanding the Approvals Audit Report

The Approval Framework produces an audit trail for each approval transaction as the transaction passes through the approval process. This audit trail includes tracking the distinction between the actions of the original approver and his or her proxy. The Approvals Audit Report Application Engine process (HCSC_AWE_ADT) creates an audit report based on this audit trail and the run criteria that you enter on the Approvals Audit Report page.

The Approvals Audit Report (AWEAUDIT) report includes the following data regarding approval transaction requests as applicable:

- Transaction number, which the Approval Framework automatically assigns to each approval transaction request.
- Approval process ID, which is defined during setup of the approval process.
- Approval definition ID, which is defined during the setup of the approval process.
- Current approver's name, if the request is still pending.
- Current request status.
- Requestor's or originator's name.
- Proxy and delegator's names, if applicable.
- Requestor's or originator's employee ID.
- Each approver's name.
- Transaction submit date.
- Transaction completion date.

Enter data into one or more of the fields to filter your report results. If you leave a field blank, the report process includes results for all possible values pertaining to that criterion. For example, if you specify the range of dates for which requests were submitted as January 1, 2009 to December 31, 2009, and a specific originating requester, then the system generates a report that includes all transactions requested by that person for 2009, regardless of approval process ID and approval definition ID.

You can view the report online in PDF format, print the report, save it, or rerun the report using different filtering criteria. You can also download the report to your local machine as a TXT, XLS, or CSV file. The top of the report displays the date and time stamp of when it was generated and a summary of the filter data selected. The report sorts the data by request submit date.

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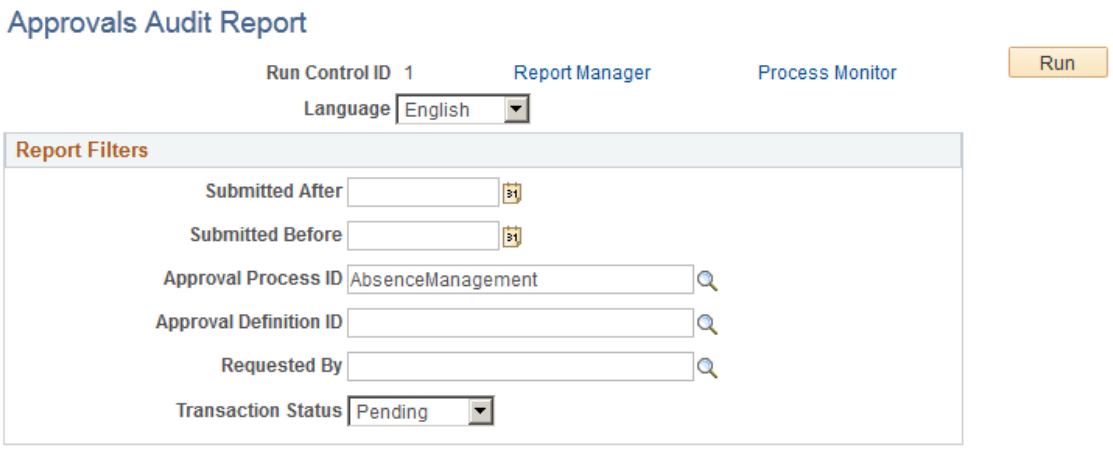
Approvals Audit Report Page

Use the Approvals Audit Report page (HCSCAWE_RUN_CNTL) to 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.

Navigation:

Workforce Administration, and then **Self-Service Transactions**, and then **Approvals and Delegation**, and then **Approvals Audit Report**, and then **Approvals Audit Report**

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



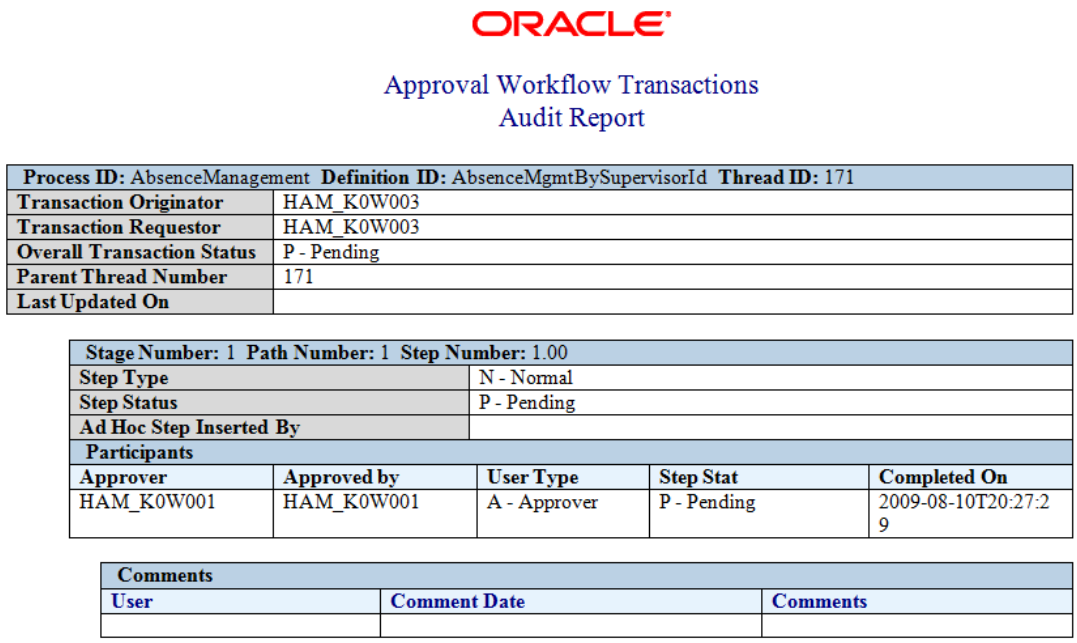
Field or Control	Description
Submitted After and **Submitted Before**	Enter a date range for which you want to include approval transaction requests in the audit report.
Approval Process ID	Select an approval processes ID to filter your report results to a specific type of approval transaction.
Approval Definition ID	Select a specific approval process definition for which you want to filter your report results.
Requested By	Select a requester to filter your report results to approval transaction requests submitted by a specific person.
Transaction Status	Select a status to filter your report results to approval transaction requests that currently have the selected status.

Sample Approvals Audit Report

The following is a sample of the Approvals Audit Report:

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

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Approval Workflow Transactions
Audit Report

Process ID: AbsenceManagement Definition ID: AbsenceMgmtBySupervisorId Thread ID: 171	
Transaction Originator	HAM_K0W003
Transaction Requestor	HAM_K0W003
Overall Transaction Status	P - Pending
Parent Thread Number	171
Last Updated On	

Stage Number: 1 Path Number: 1 Step Number: 1.00				
Step Type	N - Normal			
Step Status	P - Pending			
Ad Hoc Step Inserted By				
Participants				
Approver	Approved by	User Type	Step Stat	Completed On
HAM_K0W001	HAM_K0W001	A - Approver	P - Pending	2009-08-10T20:27:29

Comments		
User	Comment Date	Comments

> **Note**
>
> You can configure this report through the PeopleTools BI Publisher functionality.

Working with Self-Service Approval Transactions

These topics discusses the pages used to work with self-service approval transactions.

> **Important**
>
> This topic lists only the self-services pages for approval transactions that are common across multiple applications within the HCM product line. For details about self-service pages that are specific to business processes within an application, refer to application-specific documentation.

Pages Used to Work with Self-Service Approval Transactions

Page Name	Definition Name	Usage
Review Transactions Page	HCM_APPR_STATUS	View the status and details of approval transactions requests that are associated with the manager or employee viewing the page.

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Page Name	Definition Name	Usage
Select Job Page	HCM_JOB_SELECT	Select which multiple job you want to submit or approve an approval requests.

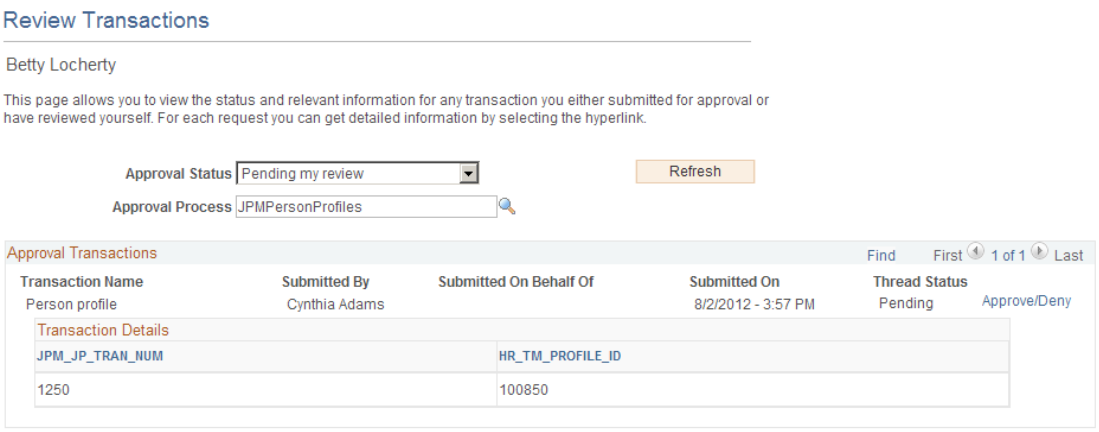
Review Transactions Page

Use the Review Transactions page (HCM_APPR_STATUS) to view the status and details of approval transactions requests that are associated with the manager or employee viewing the page.

Navigation:

- **Manager Self Service**, and then **Review Transactions**, and then **Review Transactions**
- **Self Service**, and then **Review Transactions**, and then **Review Transactions**

This example illustrates the fields and controls on the Review Transactions page.



Users can view the status and details of approval transaction requests that are pending their approval, approved, denied, or terminated. Users can additionally filter transactions by approval process.

The system displays the results in the grid. For each transaction in the grid, users can click the **View Details** link or the **Approve/Deny** link to access pages where they can review details of the transactions and take further action in the approval process.

> **Note**
>
> For archiving transactions that are stored in the Approval Framework, PeopleSoft recommends using the PeopleTools Archive manager component.

Select Job Page

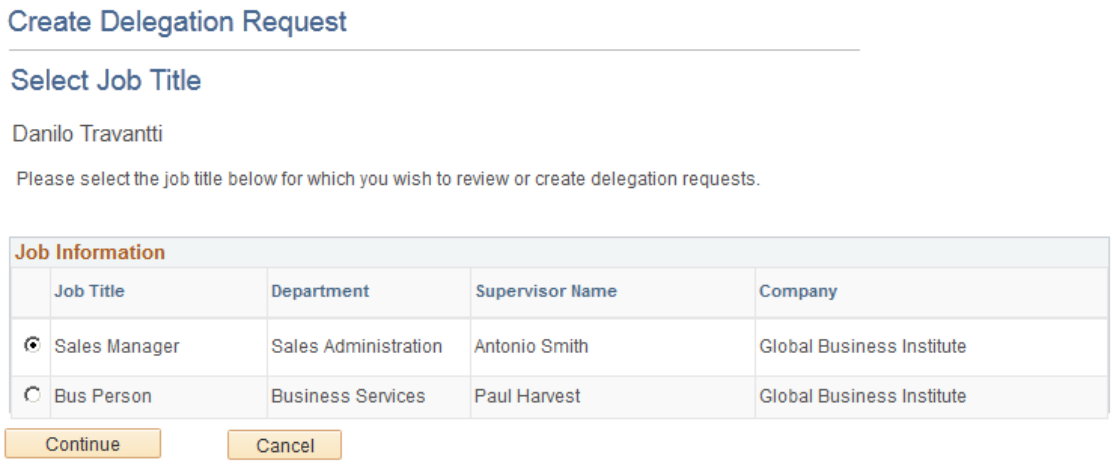
Use the Select Job page (HCM_JOB_SELECT) to select which multiple job you want to submit or approve an approval requests.

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Navigation:

The system displays this page when a user submits or approves an request and the user has multiple jobs.

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



If a user submits or approves a transaction and the user has multiple jobs, the user can select the job for which to submit or approve the transaction so that the system can route the request to the appropriate people.

Using PeopleSoft Fluid User Interface Self-Service Approval Transactions

The PeopleSoft Approvals feature provides a way for approvers to take Application Workflow Engine (AWE) actions on PeopleSoft transactions pending their approval, but can do so using any form factor.

Video: Image Highlights, PeopleSoft HCM Update Image 20: HCM Fluid Approvals

Video: PeopleSoft HCM Fluid Approvals

For more information on PeopleSoft Fluid User Interface, see Understanding PeopleSoft Fluid User Interface Homepages.

These topics provide an overview of fluid versus MAP approvals, how to access the Approvals pages, and discuss how to use PeopleSoft Fluid User Interface manager self-service approval transactions.

Related Topics

- PeopleSoft eProfile Manager Desktop: Understanding the Management of Direct Reports
- Enterprise Components: Setting Up and Using Fluid Approvals

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Pages Used for PeopleSoft Fluid User Interface Manager Self-Service Approval Transactions

Page Name	Usage
Approvals Tile (Fluid Approvals)	Review pending and historical approval requests that are associated with the logged-in manager using Fluid Approvals technology.
Approvals Tile (MAP Approvals)	Review pending and historical approval requests that are associated with the logged-in manager using MAP technology.
Pending Approvals Page	Lists pending approval requests requiring the attention of the logged-in manager.
Filter Page	Apply one or more filters to narrow your pending approvals list.
Pending Approvals - <Transaction Details> Page	Review the approval request details, enter a comment, and approve, deny, or push back the request.
Approvals History Page	Lists approvals you have worked on in the past.
Approvals History - <Transaction Details> Page	View details about an approval request you have already worked on.

Understanding Approvals and Using Fluid Vs. MAP

Mobile Approvals provides a convenient option to review and approve pending transactions.

In order to use the mobile Approvals feature, applications must utilize the Approval Framework, also known as Approval Workflow Engine (AWE). All transactions must be created in the database, and adhere to the Approval Framework logic and configuration within each application.

Currently PeopleSoft HCM uses two technologies to support approval processing through the use of the fluid pages:

- Enterprise Components - Fluid Approval Framework technology

  This technology consists of; Enterprise Objects Approval Workflow (EOAW), Application Workflow Engine (AWE), and Enterprise Objects Page Composer (EOPC). A minimum tools release of 8.54 is required for Fluid Approvals.

  Requires Tools Release: PeopleTools 8.54.27 and higher OR PeopleTools 8.55.10 and higher.

- PeopleTools - Mobile Approval Platform (MAP) technology

  This framework uses a template-layout approach for building mobile applications.

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> **Important**
>
> **When implementing Fluid Approvals, all users within the same pillar must be using Fluid Approvals.** Oracle does not support a mix of MAP Approvals and Fluid Approvals within the same pillar environment.
>
> Approvals using the MAP technology was no longer supported as of June 2017.

For more information on Enterprise Components - Fluid Approval Framework technology, see Enterprise Components: Setting Up and Using Fluid Approvals.

For more information on the Mobile Application Platform, see *PeopleSoft PeopleTools,* “Mobile Application Platform.”

Understanding How to Access the Approvals Pages

When using a mobile device, you can access the approvals pages by tapping the Approvals tile from the Manager Self Service home page. In the PeopleSoft Classic User Interface, access the Approvals tile by selecting the Fluid Home menu option, then access the Manager Self Service home page. You can also select the Notification flag icon at the top of either the fluid or classic PeopleSoft pages to view alerts in a notification window.

> **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 Enterprise Components: Understanding Notification Composer.

PeopleSoft Mobile Approvals

When you access the approvals pages by tapping the Approvals tile, the page defaults to the Pending Approvals page. The application enables you to switch between these approval views (by tapping the Action Menu drop-down icon to access either of these pages):

- Pending Approvals

  An approver can view transactions pending their approval under one interface, thus eliminating the need to go to several different components to look for pending approvals. The Pending Approvals page groups pending approvals by type, date received, from (last sender), and person; filter pending approvals by type, date, and from; display details of each approval request, including the approval chain; and provide AWE actions like Approve and Deny.

  When a transaction type is enabled for mass approvals, the approver can filter requests by that transaction type and take the approval action on multiple requests simultaneously.

- Approvals History

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An approver can also view approval requests that they already worked on. This functionality enables the user to view the status of the approval request in the approval chain and also view any comments by individuals within the chain. The administrator can define how far in the past historical approvals can be retrieved and viewed.

See Enterprise Components: Approvals History Page.

- Administer Approvals

  An Approvals administrator can view all approvals to which they have access, and take necessary actions on one or more approval requests simultaneously.

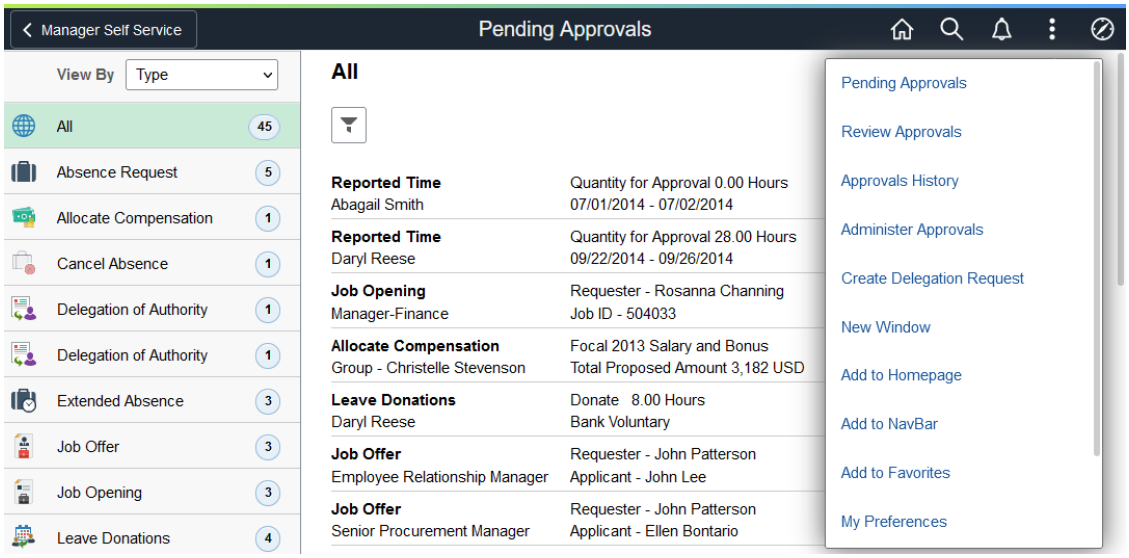
  See Enterprise Components: Administer Approvals Page.

- Create Delegation Request

  Use this link to add new delegation requests using Fluid Delegation.

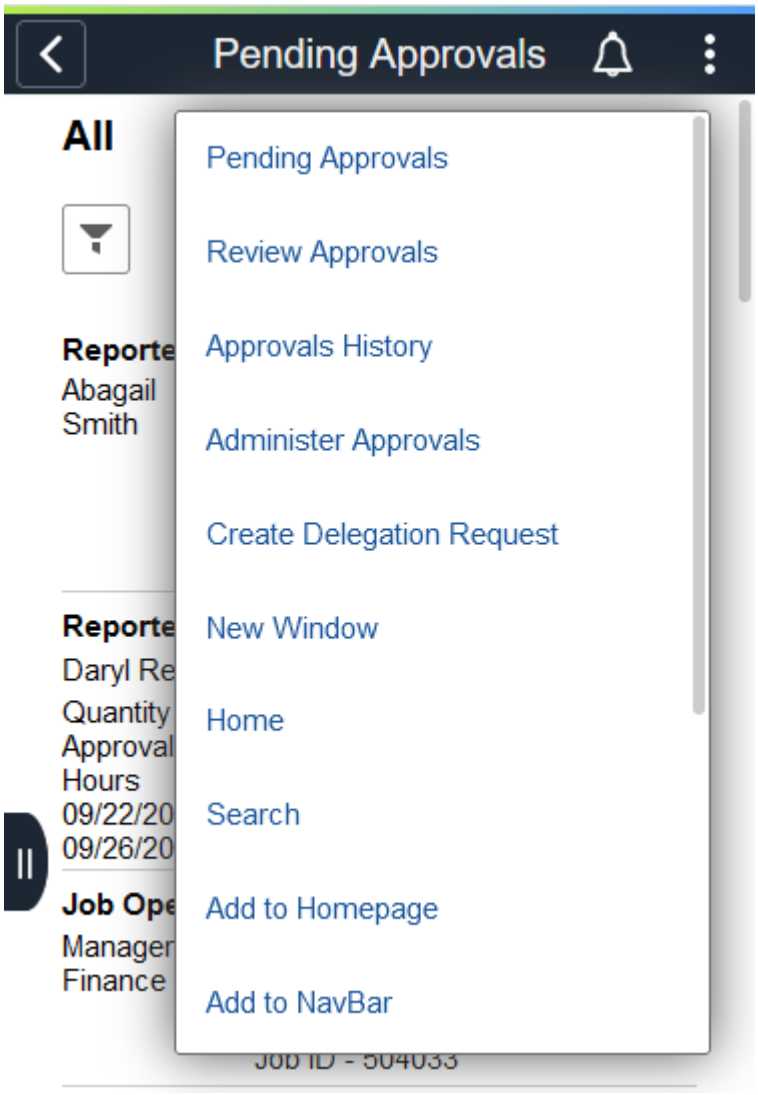
  See Enterprise Components: Create Delegation Request - Delegation Dates Page.

This example illustrates how to select other related approval pages from the Actions menu on the fluid banner for the tablet.



This example illustrates how to select other related approval pages from the Actions menu on the fluid banner for the smartphone.

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> **Note**
>
> The Approval pages may display slightly different depending on if you are using a smartphone, tablet, and if you are holding your device in landscape or portrait mode.

PeopleSoft HCM Transactions That Use Fluid Approvals

This table lists the PeopleSoft HCM self-service transactions that use fluid approvals.

PeopleSoft Application	Transaction Name	Additional Information
Absence Management	Absence Request Cancel Absence Extended Absence Leave Donations	PeopleSoft Absence Management: Approving Absence Transactions Using Fluid Approvals

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PeopleSoft Application	Transaction Name	Additional Information
Compensation Desktop Manager	Ad Hoc Salary Change	PeopleSoft eCompensation Manager Desktop: Approving Ad Hoc Salary Changes Using Fluid Approvals
Compensation Desktop Manager	Allocate Compensation	PeopleSoft eCompensation Manager Desktop: Approving Compensation Allocation Using Fluid Approvals
eBenefits	Life Event	PeopleSoft eBenefits: Approving Life Event Documents Using Fluid Approvals
eBenefits	Benefits Document Filing	PeopleSoft Benefits Administration: Approving Life Event Documents Using Fluid Approvals
eDevelopment	Person Profile Non-Person Profile	PeopleSoft eDevelopment: (Fluid) Approving Profile Items
ePay	W-4 Tax Withholding Form	PeopleSoft ePay: (USA) Using the PeopleSoft Fluid User Interface to Update PDF Tax Forms
ePerformance	Performance	PeopleSoft ePerformance: Approving Documents Using Fluid Approvals
eProfile	Employee Resignation	PeopleSoft eProfile: Approving Resignation Requests
eProfile	Employee Retirement	PeopleSoft eProfile: Approving Retirement Requests
eProfile Desktop Manager	Address Change Full/Part Time Status Location Change MaritalStatusChange Name Change Promote Employee Reporting Change Retire Employee Terminate Employee Transfer Employee	PeopleSoft eProfile Manager Desktop: Using Fluid Approvals to Approve Self Service Transaction Requests
eProfile Desktop Manager	Gender Identity Change	PeopleSoft eProfile Manager Desktop: Using Fluid Approvals to Approve Gender Identity Changes

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PeopleSoft Application	Transaction Name	Additional Information
Human Resources	Ad Hoc Salary Change Clone Position Demote Employee Full/Part Time or Hours Group Update Location Change Promote Employee Reporting Change Request Leave of Absence Retire Employee Terminate Employee Transfer Employee	PeopleSoft eProfile Manager Desktop: Approving Guided Self-Service Transactions
Human Resources (Administer Workforce)	Dotted Line (Add Dotted Line Manager) Dotted Line (Add Dotted Line Report) Dotted Line (Remove Dotted Line Manager) Dotted Line (Remove Dotted Line Report)	PeopleSoft Human Resources Administer Workforce: Using Fluid Approvals to Approve Dotted Line Relationships
Human Resources (Administer Workforce)	Form I9 Request	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Form I9 Request Page
Human Resources (Administer Workforce)	Matrix Team	PeopleSoft Human Resources Administer Workforce: Using Fluid Approvals to Approve Member Participation in Matrix Teams
Human Resources (Base Benefits)	Dependent Updates	PeopleSoft Human Resources Manage Base Benefits: Approving Dependent Documents using Fluid Approval
Human Resources (Federal)	(Personnel Actions USF) Cancel Personnel Action Correct Personnel Action	PeopleSoft Human Resources Administer Workforce: Canceling or Correcting a Personnel Action Request Using Fluid PeopleSoft Human Resources Administer Workforce: Authorizing and Approving Personnel Actions Using Fluid
Human Resources (Federal)	Personnel Action Request	PeopleSoft Human Resources Administer Workforce: Authorizing and Approving Personnel Actions Using Fluid
Human Resources (Health and Safety)	Incident Report	PeopleSoft Human Resources Monitor Health and Safety: Approving Incidents Using Fluid Approvals

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PeopleSoft Application	Transaction Name	Additional Information
Human Resources (Health and Safety)	Test Results	PeopleSoft Human Resources Monitor Health and Safety: Approving Test Results Using Fluid Approvals
Human Resources (Health and Safety)	Vaccinations	PeopleSoft Human Resources Monitor Health and Safety: Approving Vaccinations Using Fluid Approvals
Human Resources (Job Data)	Create Job Correct Job	PeopleSoft Human Resources Administer Workforce: (Fluid) Using Fluid Approvals to Manage Job Data Requests
Human Resources (Person and Job Data)	Add Employee Add Contingent Worker Add Person of Interest	PeopleSoft Human Resources Administer Workforce: (Fluid) Using Fluid Approvals to Approve Organizational Instances
Human Resources (Position Management)	Create Position Manage Position Update Position	PeopleSoft Human Resources Manage Positions: Using Fluid Approvals to Approve Position Data
Human Resources (Tuition Reimbursement)	Pre-Authorize Tuition Reimburse Tuition	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Using Fluid Approvals to Approve Tuition Reimbursement Requests
Human Resources (Remote Worker)	Remote Worker	PeopleSoft Human Resources Administer Workforce: (Fluid) Managing Remote Worker Information
Talent Acquisition Manager	Job Offer Job Opening	PeopleSoft Talent Acquisition Manager: Taking Action on Pending Approvals Related to Recruiting Using Fluid Approvals
Time and Labor	Overtime Request Payable Time Reported Time	PeopleSoft Time and Labor: Approving Time Using Fluid Approvals

Approvals Tile (Fluid Approvals)

Use the Approvals tile to review pending and historical approval requests that are associated with the logged-in manager using Fluid Approvals technology.

Navigation:

Select **Fluid Home** under the main menu. On the page that appears, select **Manager Self Service.** The Approvals tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

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This example illustrates the Approvals tile.



The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Tap the tile to access the Pending Approvals and Approvals History pages without using traditional menu navigation to review and approve different transactions.

The Approvals pages support approvals that use AWE.

Approvals Tile (MAP Approvals)

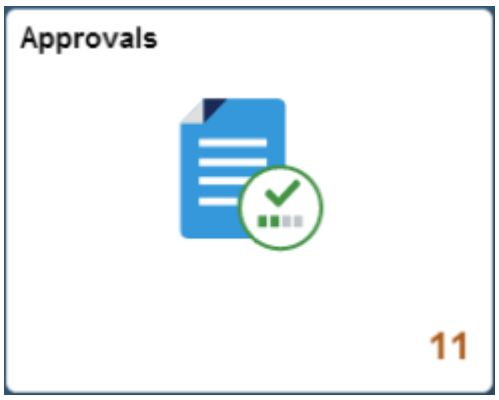
Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager using MAP technology.

Navigation:

Select **Fluid Home** under the main menu. On the page that appears, select **Manager Self Service.** The Approvals tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Approvals tile.



The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

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Tap the tile to access the Pending Approvals and Approvals History pages without using traditional menu navigation to review and approve different transactions.

The Approvals pages support approvals that use AWE.

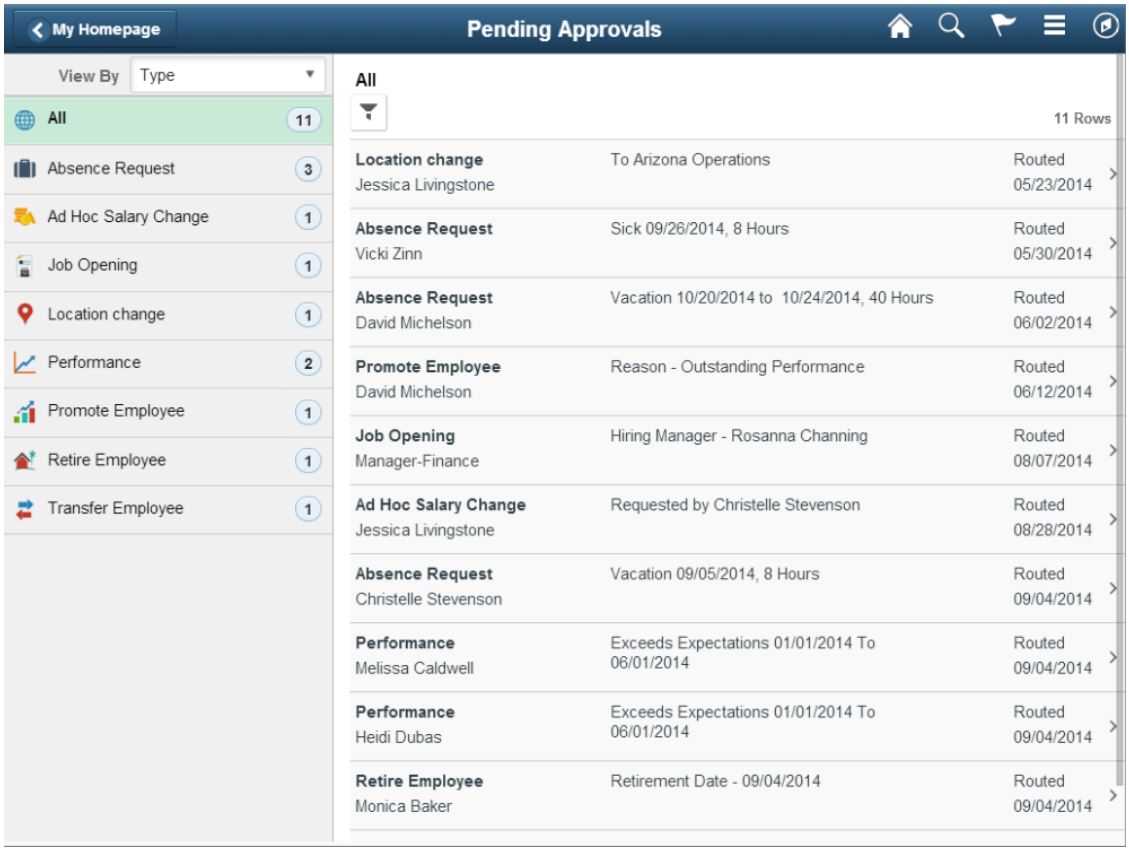
Pending Approvals Page

Use the Pending Approvals page to review and act on pending approval requests requiring the attention of the logged-in manager.

Navigation:

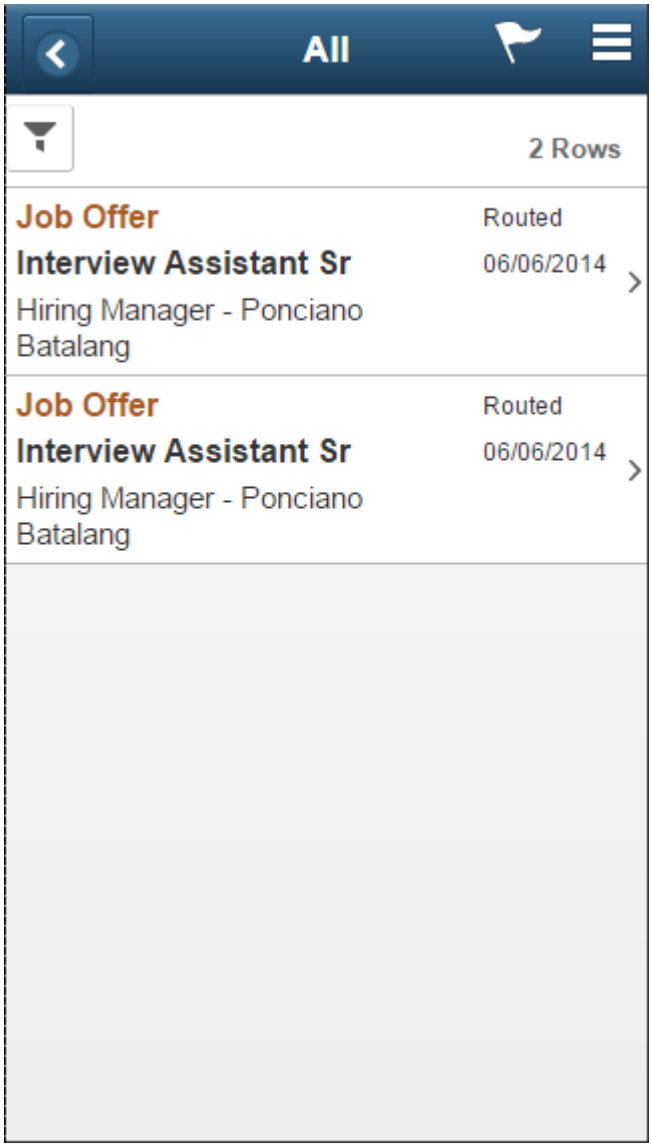
Tap the Approvals tile on the Manager Self Service home page.

This example illustrates the fields and controls on the Pending Approvals page for the tablet.



This example illustrates the relevant approval requests that appear after a view-by category is selected on the Pending Approvals page for the smartphone.

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The approvals pages display vertical tabs that group approval transaction types into categories that are defined by the **View By** type value you select. The *All* category type appears at the top of the list for all view types when there are pending transactions. Transaction categories within a **View By** type display a badge identifying the number of pending approvals for that transaction category. If you do not have any pending approvals for a transaction category the tab will not appear in the list.

> **Note**
>
> If you are using the approvals pages in portrait mode on your mobile device, the page will display an arrow on the left side of the page. Tap this arrow to reveal or hide the transaction category tabs.

Tap a transaction category tab to display the pending approvals that apply to that category. When you tap a transaction category, the page will display pending approvals sorted by the

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date on which the approval request was received, with the oldest pending approval displaying first.

Field or Control	Description
View By	Select how you want the page to display approval requests. You can group pending approvals by these view options: • *Type* (default view when you access the Approvals tile) Groups approval requests by transaction type. For example, you can display all transaction types in one list, or select a specific transaction type, such as a list of absence requests or location changes needing your attention. • *Date Routed* Provides a weekly grouping of pending approvals based on the date the approval was sent to you. Category tabs may include: – **All** (shows all pending approvals) – **Older** (anything before the start of the week before last) – **2 Weeks Ago** (start of the week before last to the end of the week before last) – **Last Week** (start of last week to the end of last week) – **This Week** (start of the current week until the current day) **Note:**Define the first day of the week by using the classic PeopleSoft pages to navigate to **My Personalizations**, and then **Personalize Regional Settings**, and selecting the **First day of week** value. • *From* Groups pending approvals by the last sender. The last sender could be either the requestor of the transaction or the last approver in the approval chain. If the last approver step in the approval chain has multiple approvers, the name of the last person who approved the request is displayed. • *Person* Shows a list of all persons for which there are pending approvals. The transaction category tabs will also list a *No Person Associated* category when there are pending approvals that are not related to a person.
 **Filter** or  **Filters applied** icons	Tap this icon to access the Filter Page and select from one or more criteria to narrow the pending approval list. The Filter icon appears green when filters have been applied to your search.

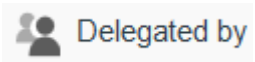
The transaction list displays the:

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1. Transaction name and the person or job posting with which it is associated.
2. A short description about the approval request.
3. The date upon which the request was routed to you.

Transaction Icons

These icons may be associated with a transaction:

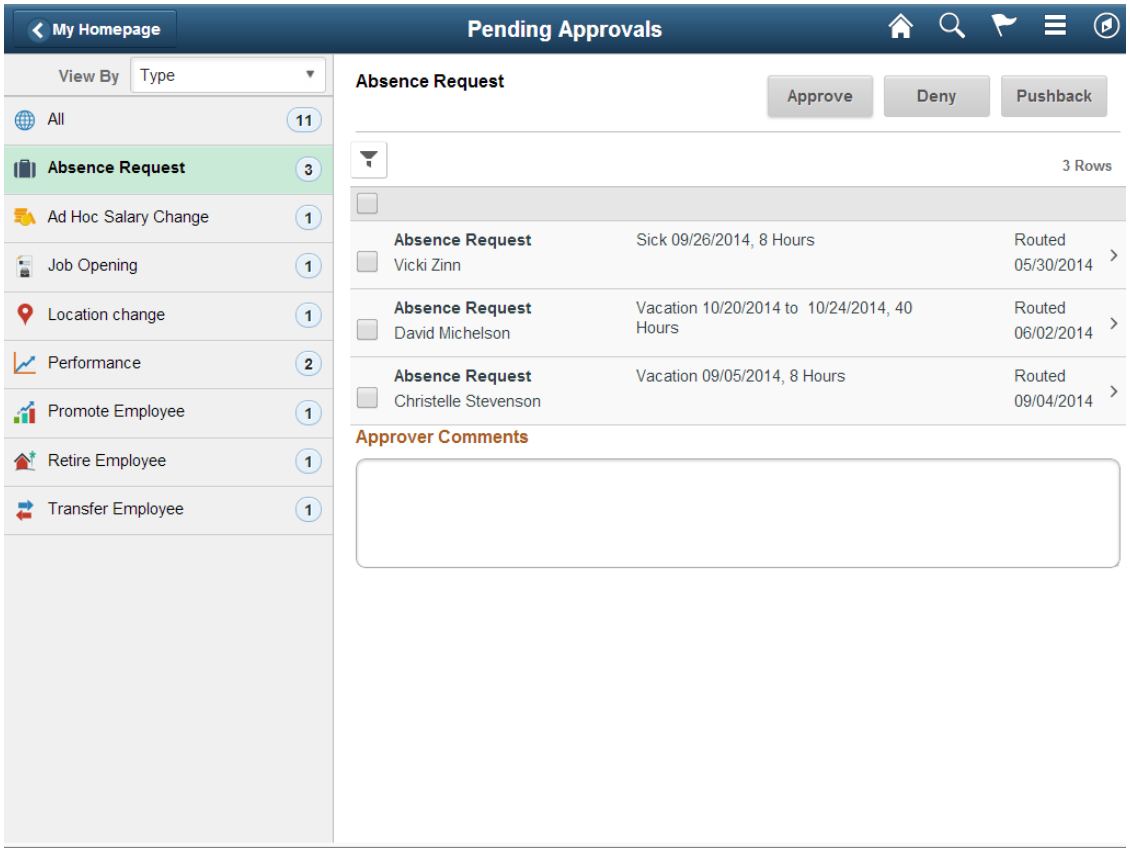
Field or Control	Description
 **Pushed back by** icon	Displays if you have approved a request and the person next in the approval chain pushes back the approval. The name of the person who pushed back the request appears after this icon. **Note:** Requests that have been pushed back are not forwarded to the next person in the approval chain. Rather, the request is sent back to the previous person in the approval chain, or to the requestor if the push back occurred with the first approver, and will be pending that person's action.
 **Delegated by** icon	Displays if you have been delegated to work on approval requests on behalf of another person. The name of the person who delegated the request appears after this icon.

Selecting a Transaction Type Category that Permits Mass Approvals

When you tap a transaction type category, the application will display the pending approval items associated with that category. The page will appear differently when a transaction type has been set up to allow mass approvals. When the transaction type category is not set up to allow mass approvals, the page lists the approval request transactions and no action can be take from the page. For these types of transactions, you must tap the desired approval request row to access the Pending Approvals - <Transaction Details> Page, where you can review and complete the approval request.

This example illustrates the Pending Approvals page (for the tablet) when a transaction category has been set up to have mass approvals enable on the Enterprise Components: Fluid Approval Setup - Transactions Page.

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This example illustrates mass approvals for the selected transaction on the Pending Approvals page for the smartphone.

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When the administrator has configured the transaction to allow mass approvals, you can take action (e.g.-approve, deny, or push back) on several approval requests within the same category at the same time. Perform mass approvals by selecting the check box before each item then tapping the appropriate action button on the page. Select or deselect all check boxes at once by tapping the top check box in the gray header.

If you do not wish to apply the same response to all transaction requests, or want to view individual details for each request, tap a row to access the Pending Approvals - <Transaction Details> Page.

Filter Page

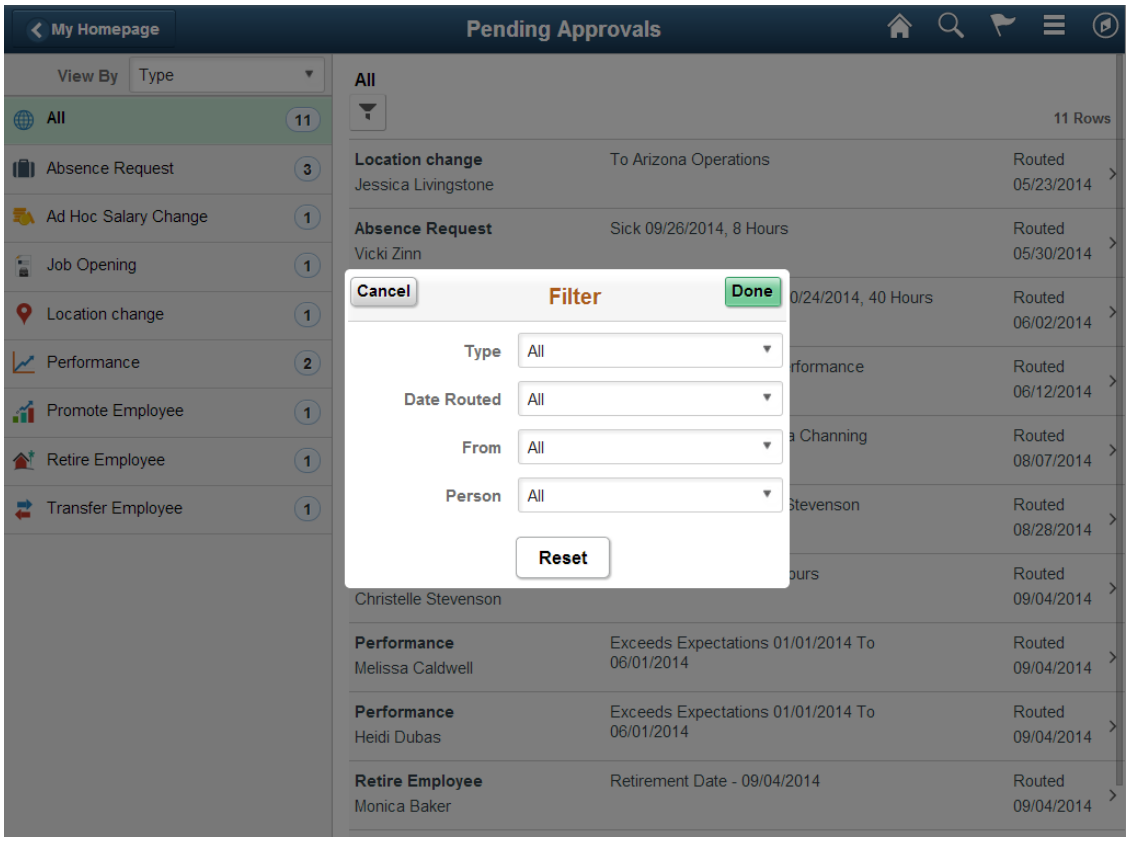
Use the Filter page to apply one or more filters to narrow your pending approvals list to those requests that meet your criteria.

Navigation:

Tap the **Filter** funnel icon at the top of the Pending Approvals or Approvals History pages.

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This example illustrates the fields and controls on the Filter page.



Use this page to identify specific categories from one or more view by items. The page displays only those fields and categories that apply to your existing pending approvals.

Field or Control	Description
Cancel	Tap this button to return to the Pending Approvals or Approvals History page.
Done	Tap this button to apply the filters and refine the approval request results on the Pending Approvals or Approvals History page. The Filter icon on the Pending Approvals or Approvals History page will change to green, indicating that there are filters in place.
Reset	Tap this button to reset the filter fields to the default value.

Pending Approvals - <Transaction Details> Page

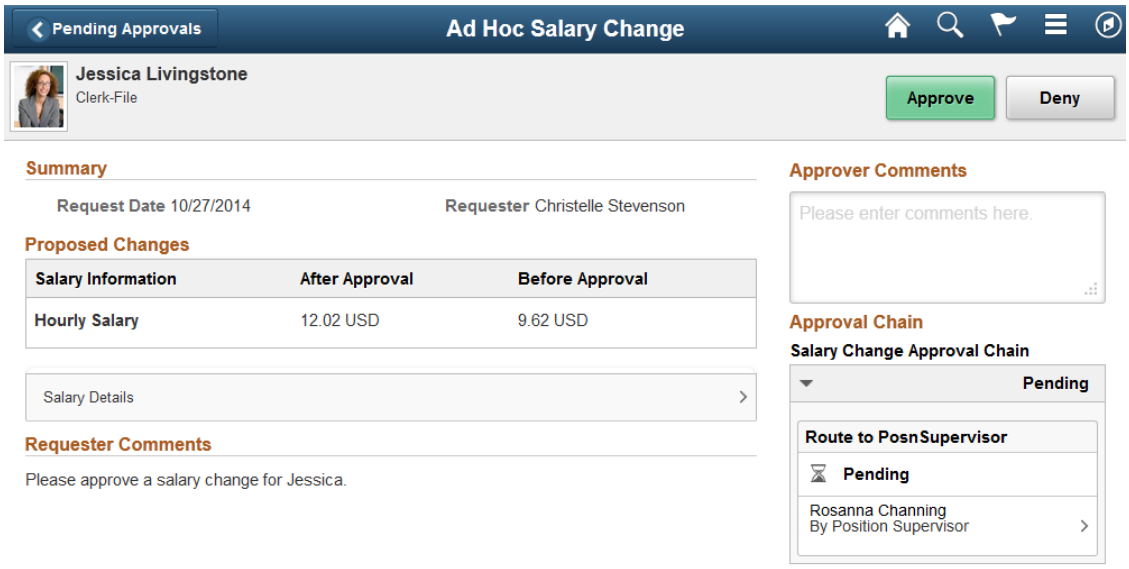
Use the Pending Approval - <Transaction Details> page to review the approval request details, make a comment, and approve, deny, or push back the request.

Navigation:

Tap an individual approval request transaction from the Pending Approvals page.

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This example illustrates the fields and controls on the Pending Approvals - <Transaction Details> page for the tablet.



This example illustrates the fields and controls on the Pending Approvals - <Transaction Details> page for the smartphone.

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> **Note**
>
> The title in the banner of this page changes based on the approval request you selected. Fields and elements on this page also vary depending on the type of approval transaction you are reviewing.

Tap the arrows on the page to expand a section and view additional details about the person, request, or approval chain. If more than one person is in the approval chain, the page will list all approvers, with the first approver on the top.

When a transaction contains an attachment, tap to open the attachment in a modal window.

The buttons that are available on the page are determined by the Enterprise Components: Fluid Approval Setup - Transactions Page. Buttons may include:

- **Approve**

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- **Deny**
- **Pushback**
- **Hold**
- **Request Information**
- **More** (the page displays this button when the other buttons do not all fit on the page)

When you approve, deny, or push back a transaction, the system will present you with a summary page, asking for a confirmation on the action you want to take. You can then submit or cancel your transaction request. If you submit the request, the transaction will be removed from you Pending Approvals queue and moved to your Approvals History Page.

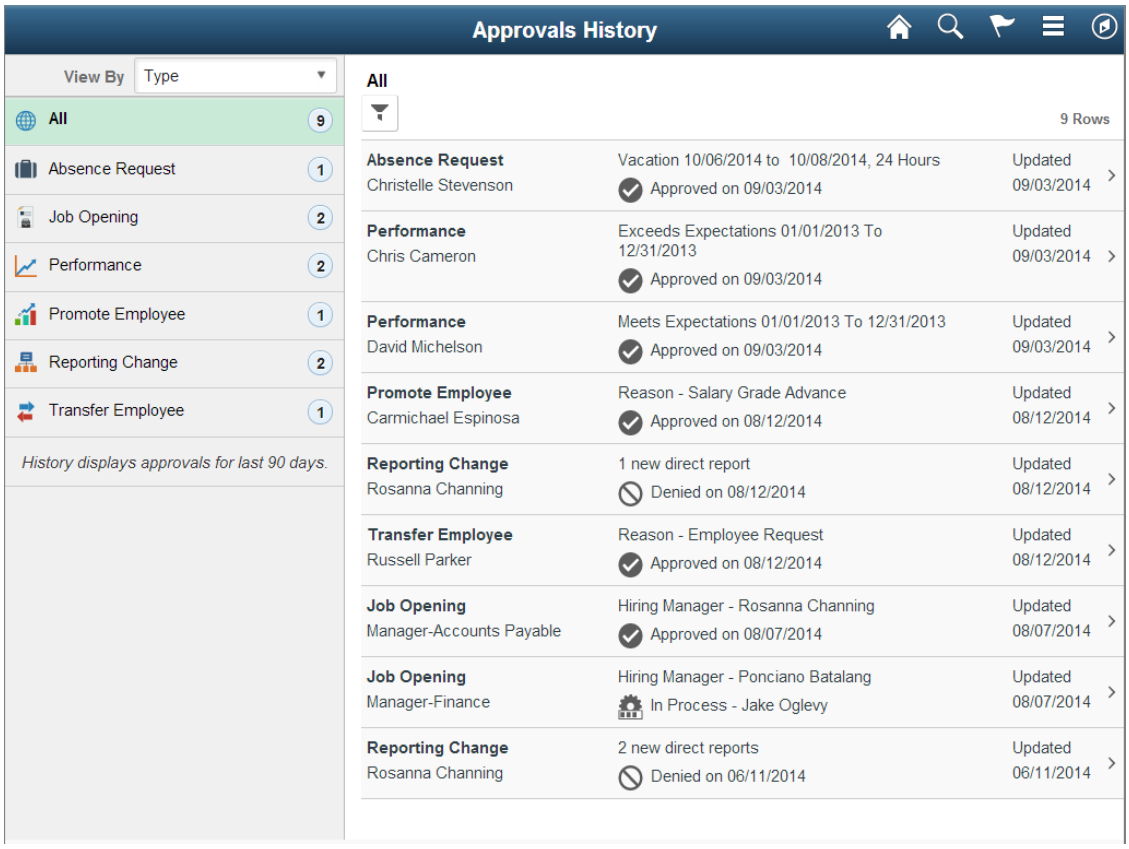
Approvals History Page

Use the Approvals History page to view approvals you have worked on in the past.

Navigation:

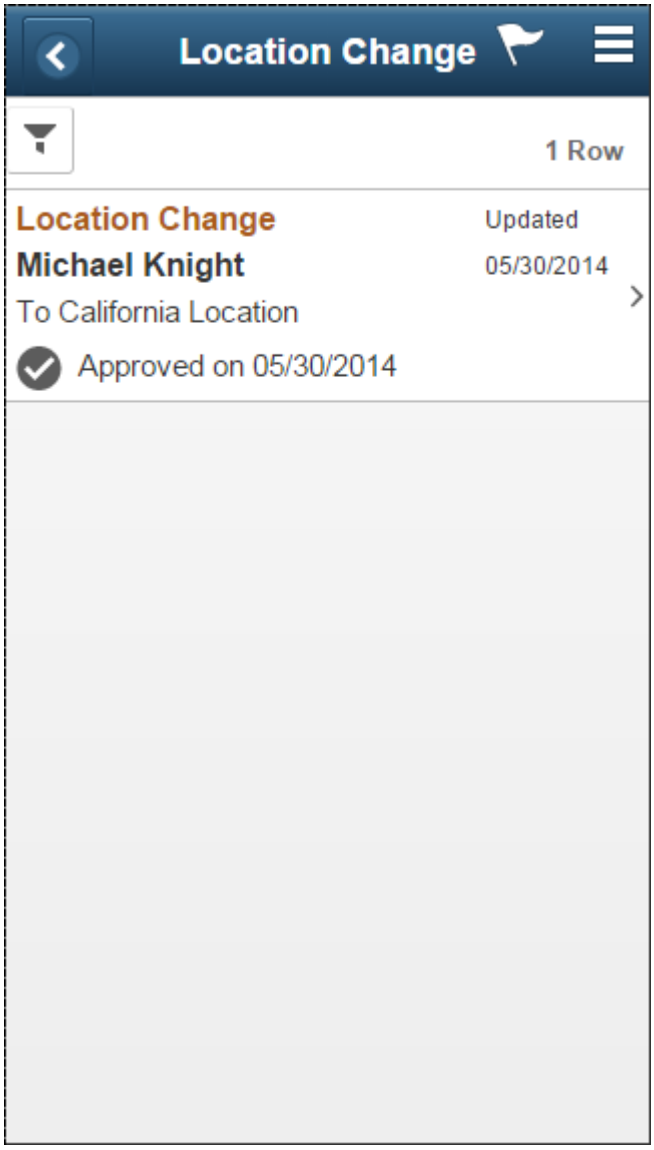
Tap the Approvals tile on the Manager Self Service home page, then select the Approvals History item from the Action Menu drop-down list (located in the banner) from the Pending Approvals page.

This example illustrates the fields and controls on the Approvals History page for the tablet.



This example illustrates the relevant approval requests that appear after a view-by category is selected on the Approvals History page for the smartphone.

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The Approvals History page shows approval transactions you have addressed in the past. How far back you can view historical approval transactions is defined by the administrator on the Enterprise Components: Fluid Approval Setup - General Settings Page. This page then displays a message below the category tabs indicating the time period for which history is displayed.

This page displays vertical tabs that group approval transactions into categories defined by the **View By** type you select. The *All* category will appear at the top of the list for all view types when there are historical approval transactions. Categories within a **View By** type will display a badge identifying the number of historical approvals for that category. If you do not have any historical approvals for a category within the designated time period, the tab will not appear in the list.

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> **Note**
>
> If you are using the approvals pages in portrait mode on your mobile device, the page will display an arrow on the left side of the page. Tap this arrow to reveal or hide the category tabs.

Tap a category tab to display the historical approvals that apply to that category. When you tap a category, the page will display historical approvals sorted by the date on which that last person updated or took action on the request, with the most recently updated approvals displaying first.

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Field or Control	Description
View By	Select how you want the page to display historical approval requests. You can group historical approvals by these view options: • *Type* (default view when you access the page) Groups approval requests by transaction type. For example, you can display all transactions types in one list, or select a specific transaction type, such as a list of absence requests or location changes you have addressed. • *Status* Displays a list that may show the following status categories: – **All** (contains all approvals that have been worked on within the historical display days) – **In Process** (contains the approvals that are being worked on but have not gone through the approval chain to completion) **Note:**If a higher level approver pushes a transaction back, the transaction will show up on the Pending Approvals page for the user that sent him or her the request. However, for the person that pushed back the request, it will show up in his or her Approvals History page with a status of *In Process.* – **Approved** – **Denied** – **Terminated** – **Other** • *From* Groups historical approvals by the last sender. The last sender could be either the requestor of the transaction or the last approver in the approval chain. • *Person* Shows a list of all persons for which you have worked on an approval within the define historical time frame. The category tabs will also list a *No Person Associated* category when there are historical approvals that are not related to a person.
 **Filter** or  **Filters applied** icons	Tap this icon to access the Filter Page and select from one or more criteria to narrow the historical approval list. The Filter icon appears green when filters have been applied to your search.

The transaction list displays the:

1. Transaction name and the person or job posting with which it is associated.

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2. A short description about the approval request and its status.
3. The date upon which the request was updated.

Tap a specific transaction to access the history transaction details page.

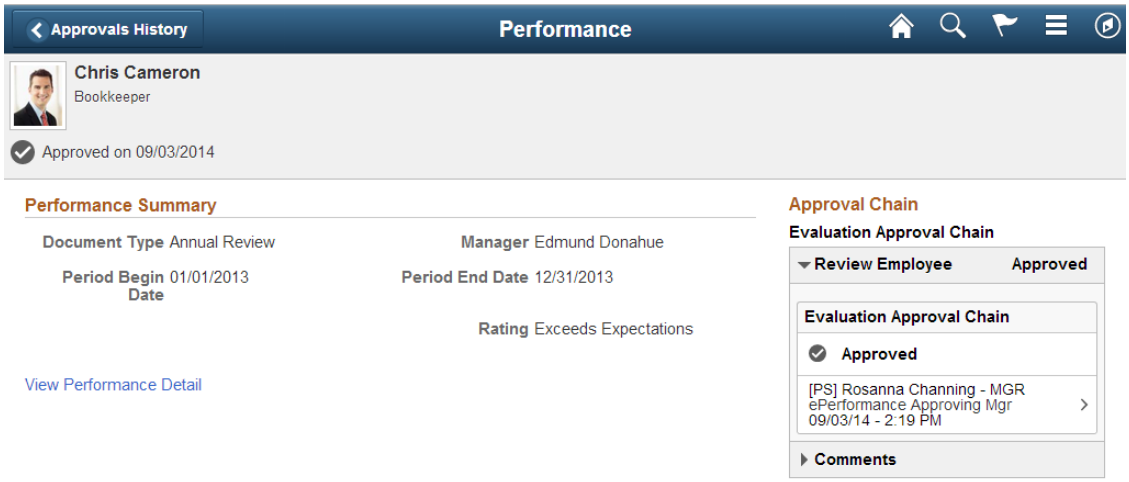
Approvals History - <Transaction Details> Page

Use the Approvals History - <Transaction Details> page to view details about an approval request you have already worked on.

Navigation:

Tap an individual approval request transaction from the Approvals History page.

This example illustrates the fields and controls on the Approvals History - <Transaction Details> page for the tablet.



This example illustrates the fields and controls on the Approvals History - <Transaction Details> page for the smartphone.

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Use the arrows and links on a page to expand sections or access additional pages to view further details about the request.

Viewing Approval Status

Requester and approvers can view the status of submitted transactions as the transactions move through the approval process.

Using the View Approval Status page allows:

- Requesters to have easy access to track submitted transactions and approval details without returning to the original submission component.
- Approvers to have quick access to the transactions that have been approved or denied by them.

Video: Image Highlights, PeopleSoft HCM Update Image 52: Requester Dashboard and Approval Statuses

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Setting Up the View Approval Status Feature

Follow these steps to set up the View Approval Status feature.

To set up the View Approval Status feature:

1. Use the Enterprise Components: Fluid Approval Setup - General Settings Page to configure general settings.
2. Use the Enterprise Components: Fluid Approval Setup - Transactions Page, **Visible to Requester** check box to enable or disable a transaction from being displayed to the requester.

   PeopleSoft delivers all transactions enabled for this feature. If you want to remove any transactions from the View Approval Status Page, you can do so using this step.
3. Use the User Profiles page (PeopleTools > Security > User Profiles > User Profiles) to add the *Requester Fluid* role to the user profile to provide access to the View Approval Status Page.

   PeopleSoft added the *EOAW1100* permission list to the *Requester Fluid* role. The existing *Approvals Fluid* role includes the *EOAW1100* permission list for approvers to access the View Approval Status Page. Any user with the existing *Approvals Fluid* role, by default, has access to the new tile and functionality.

   Users are configured to be an AWE (approval workflow engine) user as a requester, submitter, reviewer, or approver.
4. Use the Add Tile page (PTNUI_GPLT_SRCH) to add the View Approval Status Tile to any homepage.

Pages Used to View Approval Status

Page Name	Definition Name	Usage
View Approval Status Tile	EOAW_RQSTR_TILE_FL	Access the View Approval Status page.
View Approval Status Page	EOAWMA_MAIN_FL	View approval transactions that are submitted by requesters and transactions where you are an approver.

View Approval Status Tile

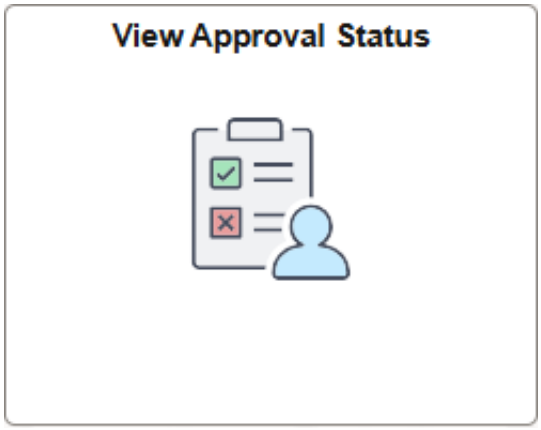
Use the View Approval Status tile (EOAW_RQSTR_TILE_FL) to access the View Approval Status page.

Navigation:

This tile is delivered on the Employee Self Service Homepage, and can be placed on any PeopleSoft Fluid Home page.

This example illustrates the fields and controls on the View Approval Status tile.

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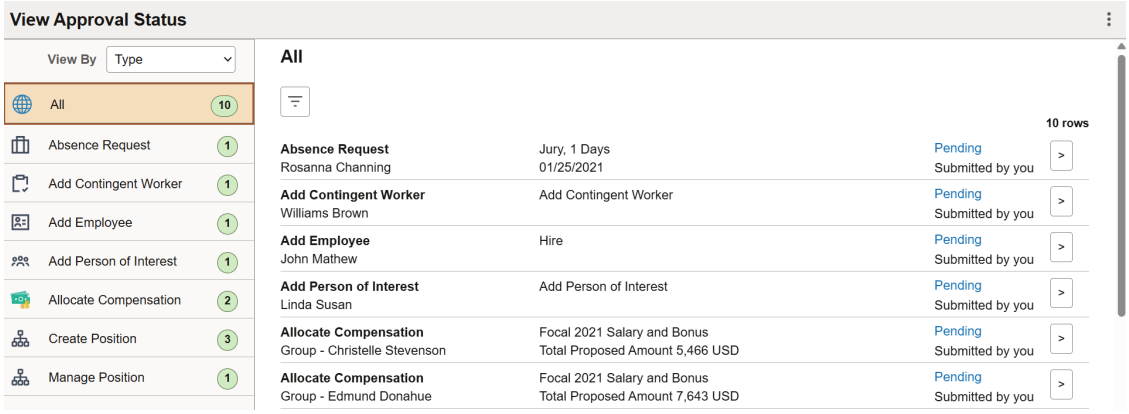
View Approval Status Page

Use the View Approval Status page (EOAWMA_MAIN_FL) to view approval transactions that are submitted by requesters and transactions where you are an approver.

Navigation:

Select the **View Approval Status** tile.

This example illustrates the fields and controls on the View Approval Status page.



> **Note**
>
> This page does not replace the Pending Approvals Page, which is used by managers and approvers to approve or deny transactions. In addition, requesters must use application-specific transaction pages to resubmit or withdraw transactions.

When a requester is logged in:

- The list only displays transactions where the person who is logged in is the requester.
- Transactions are in read-only mode, and you cannot act on them.
- The list includes transactions that have a status of Pending: In-Process, On-Hold, or Pushed Back; or Completed: Approved, Denied, or Withdrawn.

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- Transactions that are submitted by the person logged-in are indicated with *Submitted by you.*
- Transactions that are submitted by a proxy user for you are indicated with *Submitted for you.*
- Transactions that have an Approved or Denied status are displayed for x number of days.

  The number of days is determined on the Enterprise Components: Fluid Approval Setup - General Settings Page page, **Age for Approvals History in Days** field, and is calculated by the last updated date on the transaction.

When a submitter is logged in:

- The behavior is the same as the requester view.
- Transactions are in read-only mode, and you cannot act on them.
- Transactions that you submitted on behalf of someone else are indicated with *Submitted by you.*

  For example, if Sam submitted a leave of absence request on behalf of Karl for approval, then both Sam and Karl see the transaction in their respective Requester's view of the View Approval Status Page.

When an approver is logged in:

- Transactions are in read-only mode, and you cannot act on them.
- The list displays transactions where you are an approver and you have already acted on the transaction such as approving or denying the transaction.

  Transactions that are waiting for the logged-in user's approval are not listed. Use the Pending Approvals Page to act on transactions.
- Transactions where you are included in the approval chain are indicated with *Approved by you* or *Denied by you.*
- Transactions are displayed for x number of days.

  The number of days is determined on the Enterprise Components: Fluid Approval Setup - General Settings Page page, **Age for Approvals History in Days** field. and calculated by the last updated date on the transaction.
- If you are a requester and an approver who acted on a transaction, the Requester role takes precedence, and is indicated with *Submitted by you.*

  For example: You submit a leave of absence request, and you are listed as one of the approvers. You approve the request. The transaction is listed on the View Approval Status page and identified as *Submitted by you.* In addition, it displays the approver action taken by you.

Field or Control	Description
 (more actions)	Select to access a menu where you can select Pending Approvals. This option allows you to jump to the Pending Approvals Page. You can jump back to this page using the same icon and selecting View Approval Status.

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Field or Control	Description
View By	Select to group and filter approval requests in the left-hand navigation pane. Options include: • Date Routed - displays a weekly list based on the transaction date of the routing. • From - displays transactions based on the last sender. The last sender could be the requestor of the transaction or the last approver in the approval chain. • Requester - displays transactions by requester, which is helpful you are a requester and an approver. • Status - displays transactions based on the status. • Type - displays approval requests by transaction type and appears by default when you access the page.
Load More (button)	Select to display additional transactions in chunks according to the value entered on the Enterprise Components: Fluid Approval Setup - General Settings Page, Maximum Lines Displayed field.
 (filter)	Select to access the Filters window where you can filter transactions by Type, Requester, From, and Status.
(center column)	The center column displays transaction information.
(status link)	Select the linked status to access the Approval Chain window. This window is read-only and displays the approval path for the transaction and approval comments. Comments that are entered by approvers are displayed for requesters and approvers.
 (view detail)	Select to access the transaction detail page. The detail page opens in read-only mode. No actions are allowed from this page.

Setting Up Approval Insights Tables

To set up Approval Insights tables to be used for the Approval Insights dashboards, use the Define Functional Category (HCSC_FUNC_CATG), Map Functional Category (HCSC_PRCS_CATG), Insights Approval Status (HCSC_APRV_STTS), Insights Approval Transactions (HCSC_APRV_PRCS), and Approval Insights Security (HCSC_APR_INS_SEC) components.

This topic discusses the setup pages used to support Approval Insights for the manager and administrator.

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Related Topics

- Understanding How to Set Up the Approval Insights Dashboards
  Before managers and administrators can access the visualizations for approval analytics, the following steps need to be performed:
- Viewing Approval Insights
  PeopleSoft Approval Insights provides managers and administrators the ability to view and analyze approval data using PeopleSoft Insights visualizations.

Pages Used to Set Up Approval Insights Tables

Page Name	Definition Name	Usage
Define Functional Category Page	HCSC_FUNC_CATG	Review and manage functional categories for grouping approval transactions on the Approval Insights dashboards.
Map Functional Category Page	HCSC_PRCS_CATG	Associate approval transactions to a functional category.
Insights Approval Statuses - Admin Insights St Page	HCSC_AP_AD_STTS	Identify approval request statuses to be indexed and used by administrators on the Admin Approval Insights dashboard.
Insights Approval Statuses - Manager Insights Page	HCSC_APINS_STTS	Identify approval request statuses to be indexed and used by managers on the Approval Insights dashboard.
Insights Approval Transactions - Admin Insights Page	HCSC_AP_ADM_PRCS	Define the approval transactions you want administrators to view and the period of time for them to analyze approval data on the Admin Approval Insights dashboard.
Insights Approval Transactions - Manager Insights Page	HCSC_APINS_PRCS	Define the approval transactions you want managers to view and the period of time for them to analyze approval data on the Approval Insights dashboard.
Approval Insights Security Page	HCSC_APR_INS_SEC	Specify which roles can access the different approval processes for Insights transaction data.

Understanding How to Set Up the Approval Insights Dashboards

Before managers and administrators can access the visualizations for approval analytics, the following steps need to be performed:

1. Set up Insights Approval tables.
   a. Define functional categories for grouping approval transactions on the Define Functional Category Page.

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b. Map approval transactions to functional categories on the Map Functional Category Page.

c. Define Insights approval statuses for indexing on the Insights Approval Statuses - Manager Insights Page and Insights Approval Statuses - Admin Insights St Page.

d. Specify approval processes for indexing and the look back review period for analysis on Insights Approval Transactions - Manager Insights Page and Insights Approval Transactions - Admin Insights Page.

> **Note**
>
> This needs to be performed prior to running the full index. The look back period set here will become the duration filter on the open search dashboard.

e. Specify which roles can access the different approval processes for Insights transaction data on the Approval Insights Security Page.

2. Run Search Indexes.

a. Deploy the index for the following users:

(**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**)

- (Manager) *HCSC_APRV_INSIGHTS* - Approval Insights Feed.
- (Administrator) *HCSC_APR_ADM_INSIGHTS* - Approval Insights for Admins

b. Build the search index for the following users:

(**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**)

- (Manager) *HCSC_APRV_INSIGHTS*.
- (Administrator) *HCSC_APR_ADM_INSIGHTS*

If the full indexing takes too long, you can use the following options:

–- Use the Index Data Partitioning feature provided by PeopleTools on the Schedule Search Index page (see *PeopleTools: Search Technology*, “Administering PeopleSoft Search Framework," Working with Search Indexes).

–- Select only the specific transactions required in the Insights Approval Transactions component.

–- Select only the specific statuses required in the Insights Approval Statuses component.

3. Deploy the tile and dashboard for the following users:

(**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Deploy Insights Dashboards**)

- (Manager) *Approval Insights Tile* and *Approval Insights* dashboard
- (Administrator) *Admin Approval Insights Tile* and *Admin Approval Insights* dashboard

> **Note**
>
> The full index must be run before the dashboard can be deployed.

4. Assign roles to the following users:

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- (Administrator)

  AWE Administrator role includes access to the manager Insights approval setup pages.

  Ins Cat Admin Approval Insight role is required to access the dashboard through Insights Catalog.

  HR Administrator role is required to access the dashboard through the tile. The user can use personalizations to add the tile to a homepage.

- (Manager) *Manager* role includes access to the Approval Insights tile and dashboard. It also give access to the View Approval Chain page.

Real Time Indexes for Approval Insights Visualizations

The *HCSC_APRV_INSIGHTS* (Approval Insights) search index that allows managers to view team approval statistics supports real time indexing (RTI) with a minimum PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

The *HCSC_APR_ADM_INSIGHTS* (Admin Approval Insights) search index that allows administrators to view the organization's approval statistics supports real time indexing (RTI) with a minimum PeopleTools version 8.62.06 or higher. When enabled, RTI allows real-time updates to the indexed data to provide a search using the latest information.

For more information about Real Time Indexing, refer to *PeopleTools: Search Technology*, “Administering Real Time Indexing."

Related Topics

- Understanding PeopleSoft Insights Using PeopleSoft Search Framework
  This topic provides an overview about PeopleSoft Insights and discusses:
- Understanding Real Time Indexing in HCM
  Real Time Indexing (RTI) uses DirectTransfer methods to transmit search indexing data directly from PeopleSoft batch servers to the search engine. It is performed in near real-time by indexing the data as soon as it is saved.

Define Functional Category Page

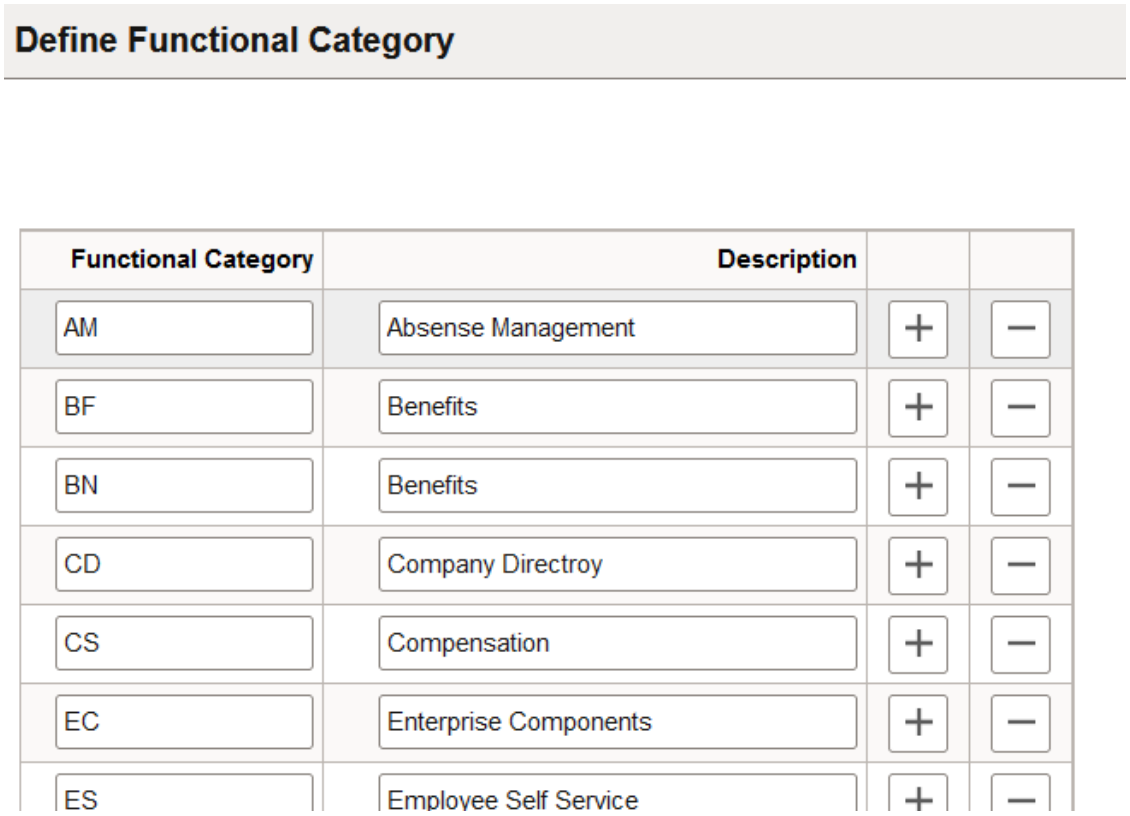
Use the Define Functional Category page (HCSC_FUNC_CATG) to review and manage functional categories for grouping approval transactions on the Approval Insights dashboards.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Define Functional Category**

This example illustrates the fields and controls on the Define Functional Category page.

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Field or Control	Description
Functional Category and **Description**	Enter a two character code and description to identify a functional category that will be available on the Approval Insights dashboards. When you add a new functional category row, the system automatically adds the row to the Map Functional Category Page, where you identify approval transactions that should be part of that category. This information is used when building the Approval Insights index. Users can then use these categories as a filter on the Approval Insights Dashboard (for Managers) and Admin Approval Insights Dashboard.

Related Topics

- Viewing Approval Insights
  PeopleSoft Approval Insights provides managers and administrators the ability to view and analyze approval data using PeopleSoft Insights visualizations.

Map Functional Category Page

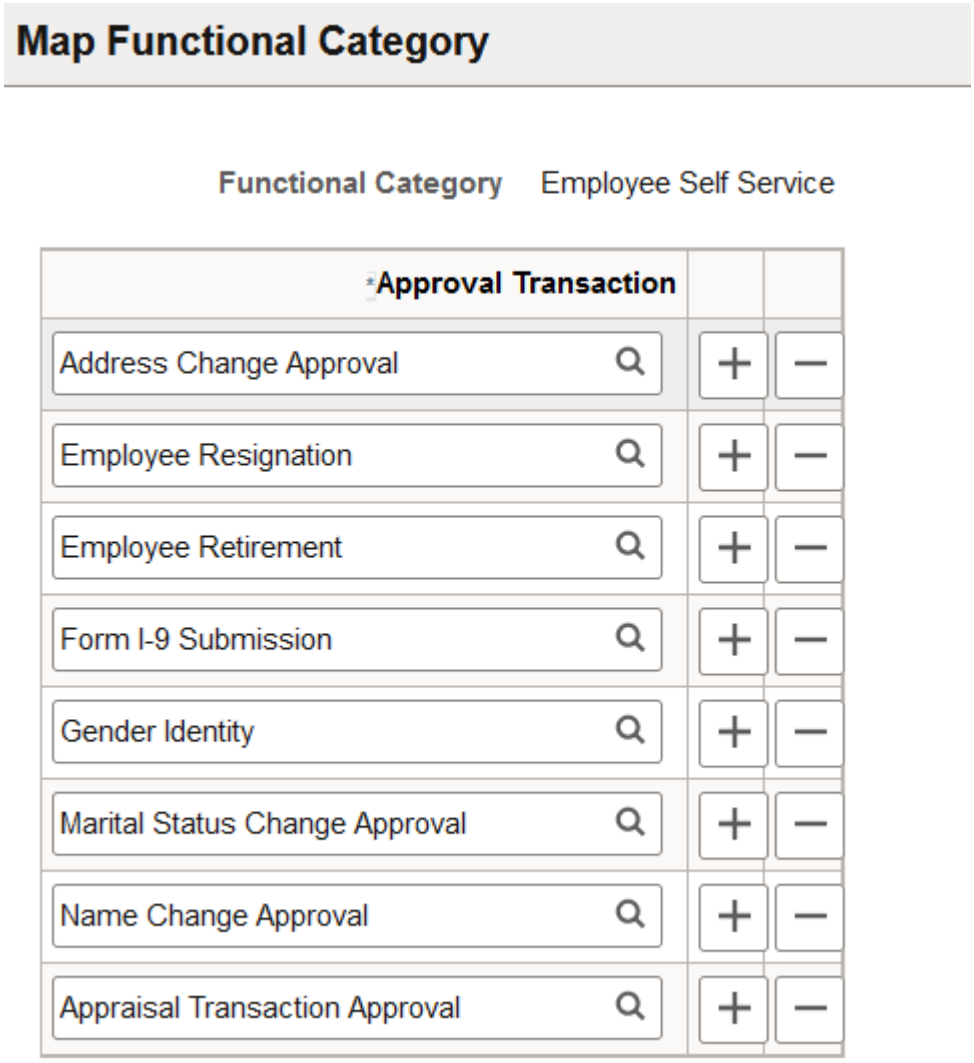
Use the Map Functional Category page (HCSC_PRCS_CATG) to associate approval transactions to a functional category.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Map Functional Category**

This example illustrates the fields and controls on the Map Functional Category page.



For each functional category, add or removed approval transactions.

Insights Approval Statuses - Admin Insights St Page

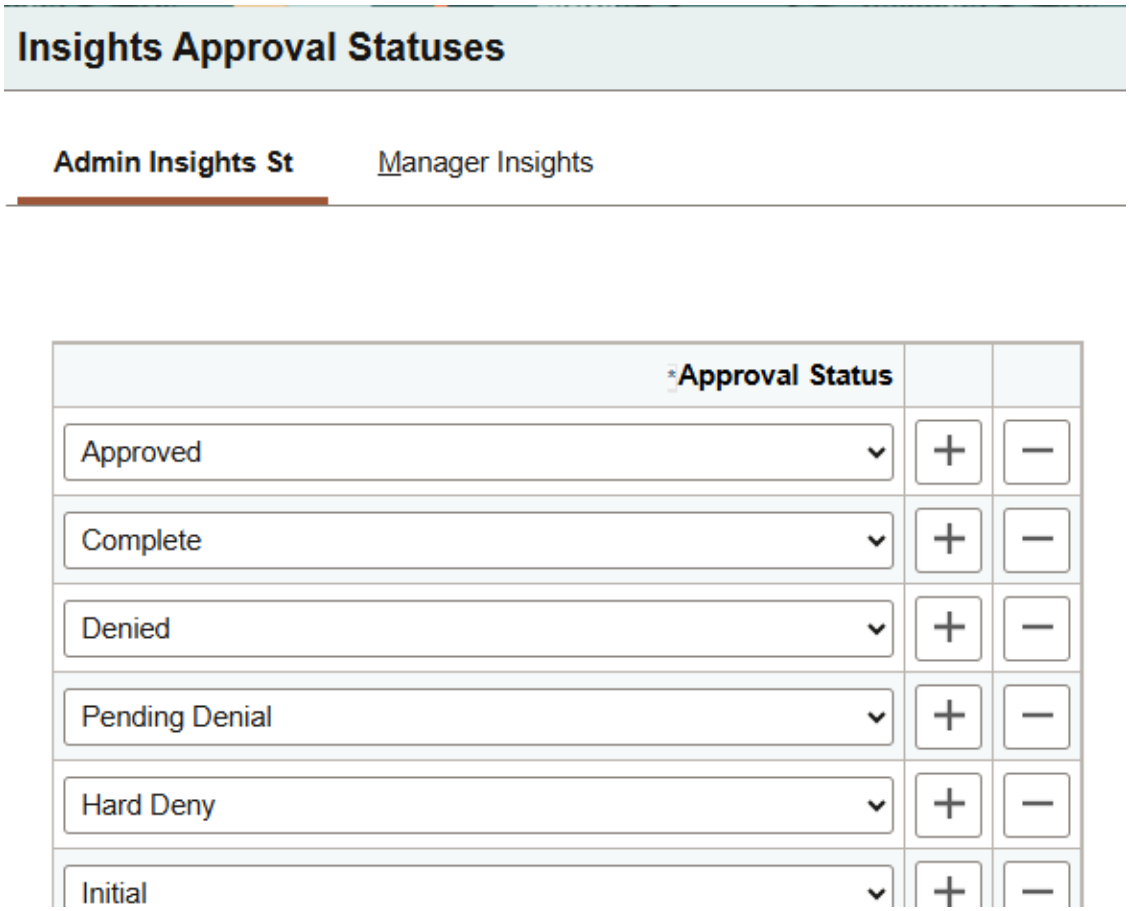
Use the Insights Approval Statuses - Admin Insights St page (HCSC_AP_AD_STTS) to identify approval request statuses to be indexed and used by administrators on the Admin Approval Insights dashboard.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Insights Approval Statuses**, and then **Admin Insights St**

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This example illustrates the fields and controls on the Insights Approval Statuses - Admin Insights St page.



Add or removed statuses you want to capture for the Admin Approval Insights dashboard.

Insights Approval Statuses - Manager Insights Page

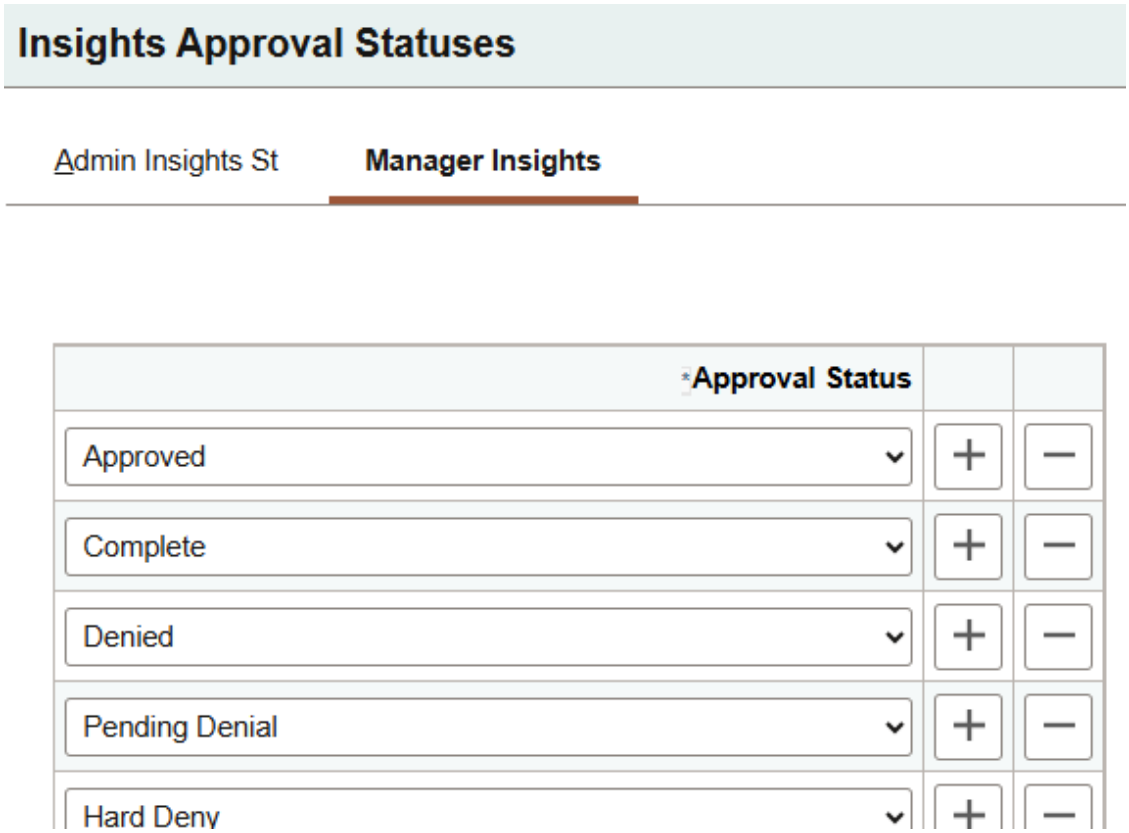
Use the Insights Approval Statuses - Manager Insights page (HCSC_APINS_STTS) to identify approval request statuses to be indexed and used by managers on the Approval Insights dashboard.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Insights Approval Statuses**, and then **Manager Insights**

This example illustrates the fields and controls on the Insights Approval Statuses - Manager Insights page.

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Add or removed statuses you want to capture for the Approval Insights dashboard.

Insights Approval Transactions - Admin Insights Page

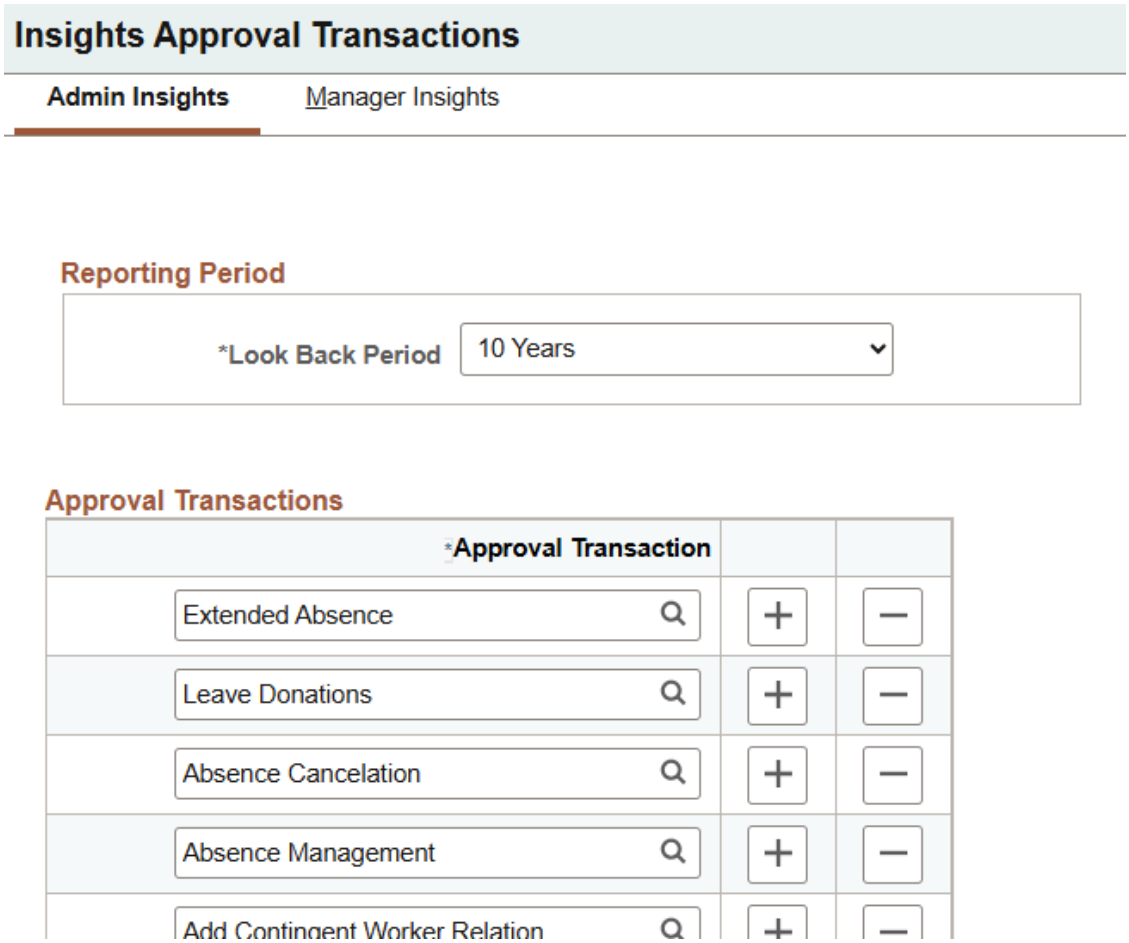
Use the Insights Approval Transactions - Admin Insights St page (HCSC_AP_ADM_PRCS) to define the approval transactions you want administrators to view and the period of time for them to analyze approval data on the Admin Approval Insights dashboard.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Insights Approval Transactions**, and then **Admin Insights St**

This example illustrates the fields and controls on the Insights Approval Transactions - Admin Insights St page.

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Field or Control	Description
Look Back Period	Select the desired period of time you want administrators to view and analyze approval data. Initial indexing of the data is based on the look back period. Time period options are from one to five years in annual increments from today's date. **Note.** This needs to be performed prior to running the full index. The look back period set here will become the duration filter on the open search dashboard.
Approval Process	Select the approval transactions that need to be indexed.

Insights Approval Transactions - Manager Insights Page

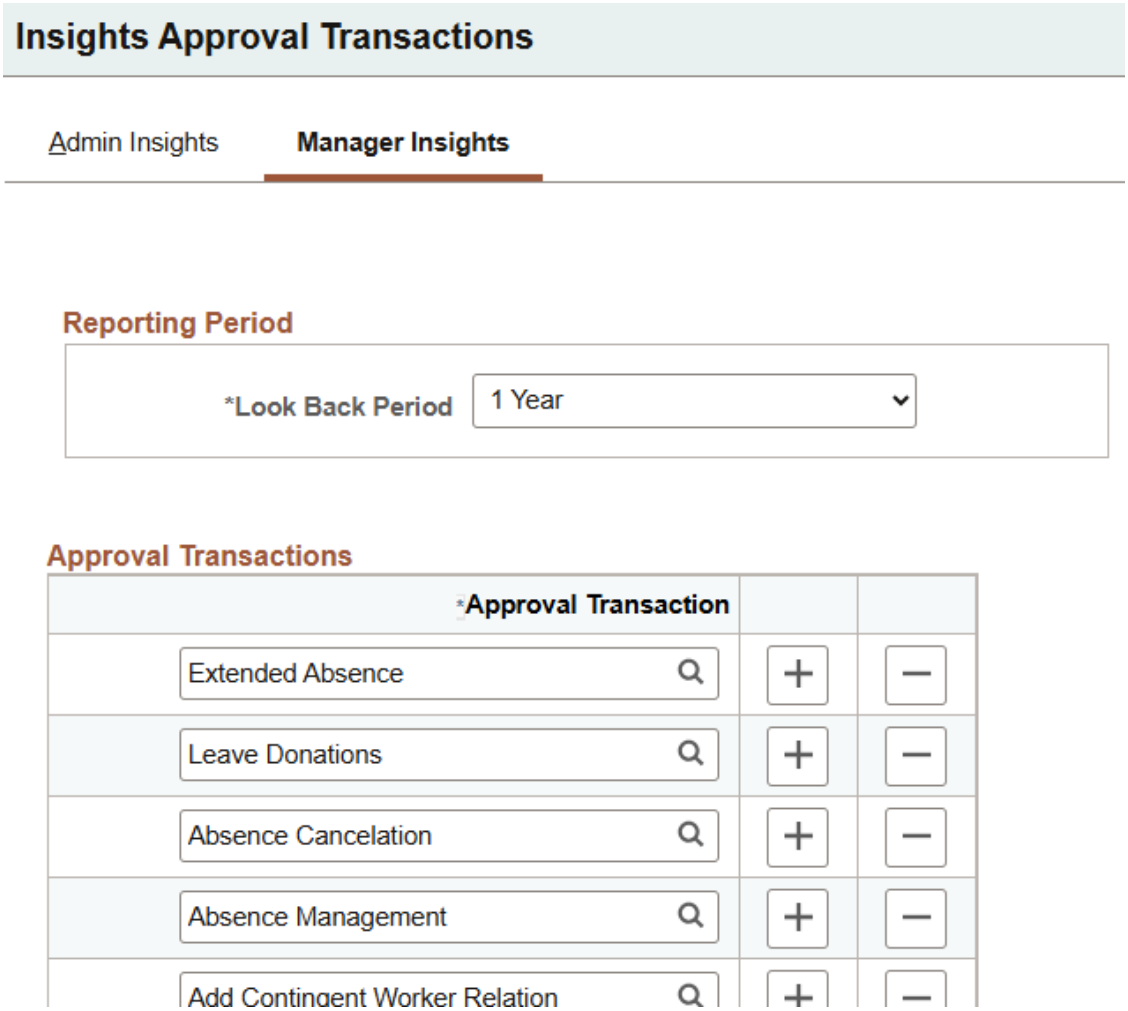
Use the Insights Approval Transactions - Manager Insights page (HCSC_APINS_PRCS) to define the approval transactions you want managers to view and the period of time for them to analyze approval data on the Approval Insights dashboard.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Insights Approval Transactions**, and then **Manager Insights**

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This example illustrates the fields and controls on the Insights Approval Transactions - Manager Insights page.



Field or Control	Description
Look Back Period	Select the desired period of time you want managers to view and analyze approval data. Initial indexing of the data is based on the look back period. Time period options are from one to five years in annual increments from today's date. **Note.** This needs to be performed prior to running the full index. The look back period set here will become the duration filter on the open search dashboard.
Approval Process	Select the approval transactions that need to be indexed.

Approval Insights Security Page

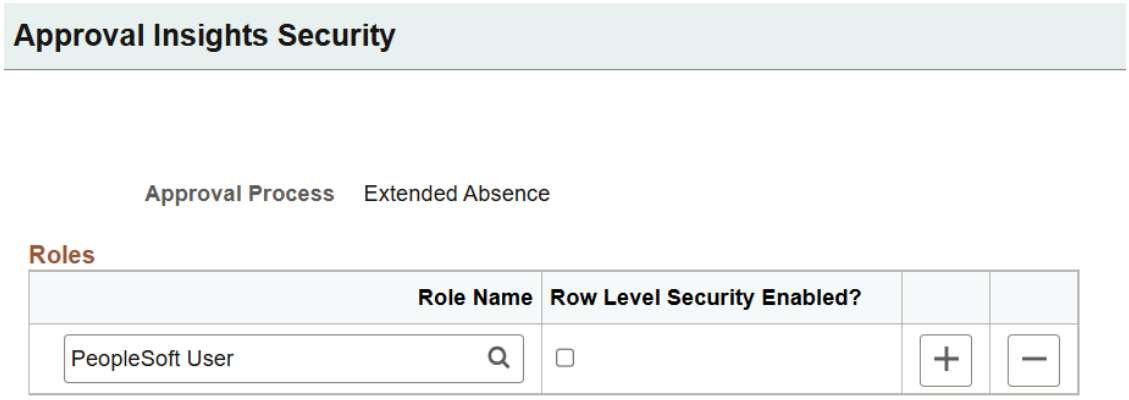
Use the Approval Insights Security page (HCSC_APR_INS_SEC) to specify which roles can access the different approval processes for Insights transaction data.

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Navigation:

Set Up HCM, and then **Common Definitions**, and then **Approvals**, and then **Approval Insights Security**

This example illustrates the fields and controls on the Approval Insights Security page.



Field or Control	Description
Approval Process	Displays the approval process to which you will add security roles. You will select from a list of all approval transactions on the search page before accessing this page.
Roles	Identify the roles that should have access to the selected approval process.
Role Level Security Enabled?	Select to grant access only to those transactions where approvers fall within the administrator's row level access. Deselect to grant access to all the approval transactions within this approval process.

Viewing Approval Insights

PeopleSoft Approval Insights provides managers and administrators the ability to view and analyze approval data using PeopleSoft Insights visualizations.

Based on user privileges, a user can access the visualizations delivered on the following dashboards to monitor approval data:

- (Managers) Approval Insights dashboard
- (Administrators) Admin Approval Insights dashboard

> **Note**
>
> The dashboards use the security defined on the Approval Insights Security Page display permitted data to the user.

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The Approval Insights dashboards are built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine.

- The **Manager Approval Insights** dashboard is built on approval data for a manager's direct and indirect reports and uses search index *HCSC_APRV_INSIGHTS*.
- The **Admin Approval Insights** dashboard is built on approval data for the organization and uses search index *HCSC_APR_ADM_INSIGHTS*.

Prior to using the Approval Insights dashboards, you must first complete the setup configurations. For information on how to set up the Approval Insights tables, see Understanding How to Set Up the Approval Insights Dashboards

This topic lists common elements and controls and discusses the PeopleSoft Approval Insights 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 PeopleSoft Insights feature:

Video: Insights with PeopleSoft

Video: PeopleSoft HCM Insights

Video: Image Highlights, PeopleSoft HCM Update Image 51; Approval Insights for Managers

For information on Insights dashboards, see:

- Understanding PeopleSoft Insights Using PeopleSoft Search Framework
- *PeopleTools Search Technology:* “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Pages Used to View Approval Insights

Page Name	Definition Name	Usage
Approval Insights Tile (for Managers)	HC_APRV_INSIGHTS_FL (this is the cref for the tile)	As a manager, access and view analytics related to approval requests that fall under your hierarchy.
Approval Insights Dashboard (for Managers)	HC_APRV_INSIGHTS_FL	As a manager, review and analyze approval data that falls under your management using visualizations.
Admin Approval Insights Tile	HC_ADM_APPROVAL_INSIGHTS_LP_FL (this is the cref for the tile)	As an administrator, access and view analytics related to approval requests for the organization.
Admin Approval Insights Dashboard	HC_ADMIN_APRV_INSIGHTS_FL	As an administrator, review and analyze approval data for the organization using visualizations.

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Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

> **Note**
>
> 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.

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.

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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 within the grids 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 bar item for requests by manager, the system will prompt you to add the supervisor's name and the approval status. since this item consists of more than one filter. Click this icon (**Change all filters**) 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). Select 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 that falls within the look back period defined during setup. You can enter dates 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.

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.

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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.

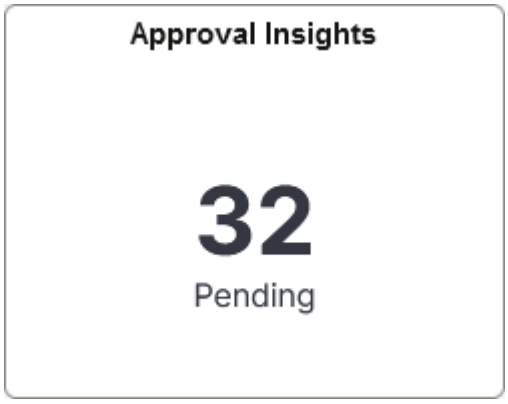
Approval Insights Tile (for Managers)

Managers use the Approval Insights tile to access and view analytics related to approval requests that fall under their hierarchy.

Navigation:

The Approval Insights tile is located on the Manager Self Service Homepage.

This example illustrates the Approval Insights tile.



This tile displays the number of pending approval requests for all approvers under the logged in manager's hierarchy.

Select this tile to access the Approval Insights Dashboard (for Managers) and analyze visualizations related to approval information.

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Approval Insights Dashboard (for Managers)

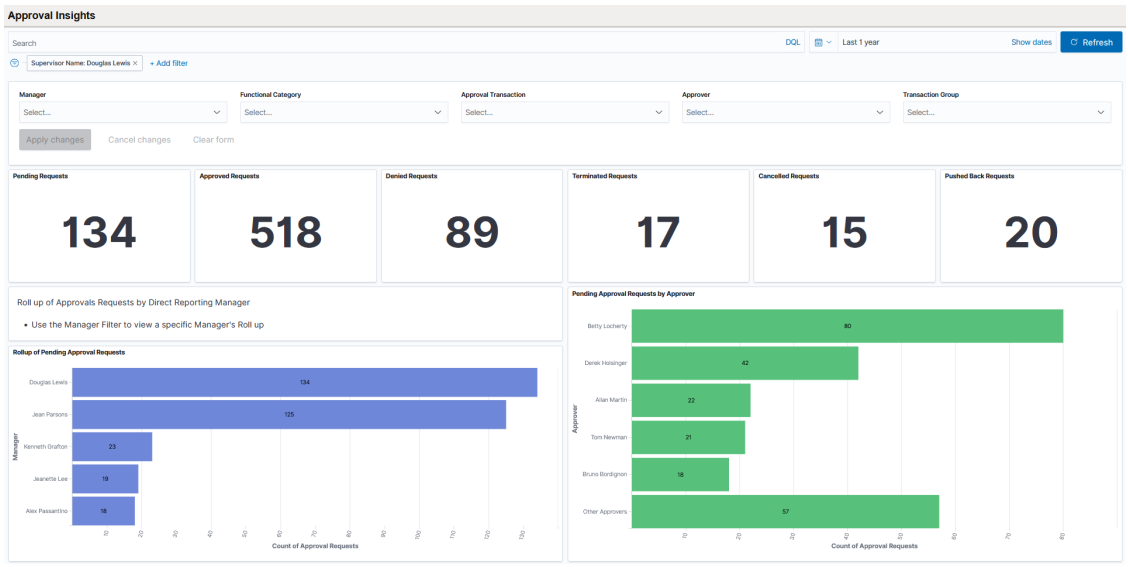
Managers use the Approval Insights dashboard to review and analyze approval data that falls under your management using visualizations.

Navigation:

- **Manager Self Service homepage**, and then **Approval Insights tile**
- Select the Manager Approval Insights option from the Insights Catalog Navigation Collection.

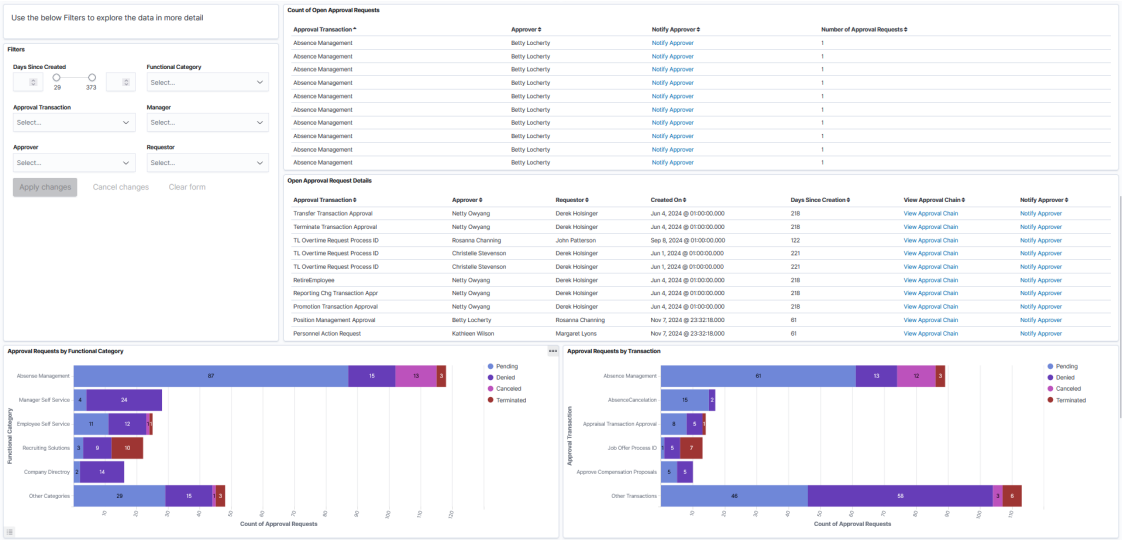
> **Note**
>
> You must be assigned the *Manager* role to view this dashboard.

This example illustrates the Approval Insights dashboard (1 of 3).

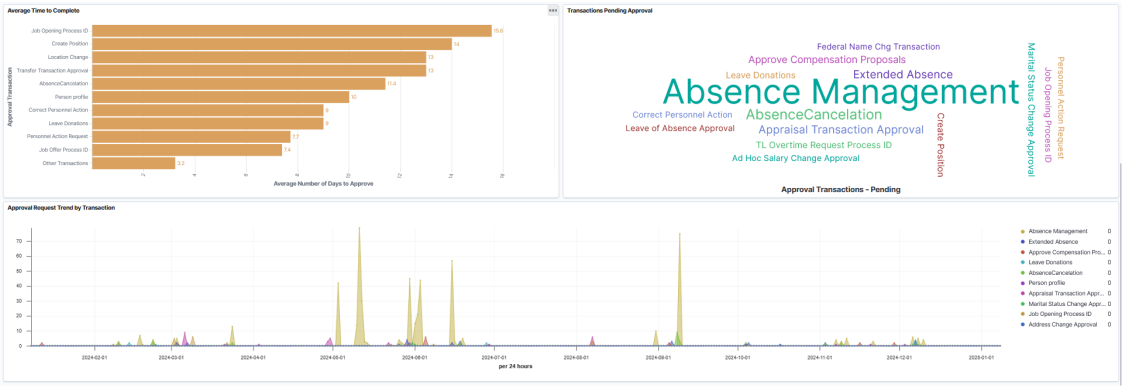


This example illustrates the Approval Insights dashboard (2 of 3).

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This example illustrates the Approval Insights dashboard (3 of 3).



> **Warning**
>
> PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

Approval Insights - Filters

This section contains the following filters to sort data.

Field or Control	Description
Filters: • **Manager** • **Functional Category** • **Approval Transaction** • **Approver** • **Transaction Group**	Filters are applied by the order of filter fields. For example, by manager, followed by functional category, then by approval transaction, then so on.

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For a list of common filter controls available for the Admin Approval Insights dashboard, see the Common Elements and Controls section in this documentation.

Approval Insights - Visualizations

The Approval Insights dashboard provides you with the following collection of interactive visualizations to view and analyze approval data based on permissions, the criteria specified and Approval Insights setup (see Setting Up Approval Insights Tables).

Visualization	Description
Metrics: • **Pending Requests** • **Approved Requests** • **Denied Requests** • **Terminated Requests** • **Cancelled Requests** • **Pushed Back Requests**	These panels display a count of the specified approval statuses that fall within in the specified filter criteria.
Rollup of Pending Approval Request by Manager horizontal bar chart	This visualization displays the count of pending requests with the approvers in the logged manager's hierarchy.
Pending Approval Requests by Approver horizontal bar chart	This visualization displays the number of pending approval requests by approver. It shows the top five (5) approvers with the highest number of requests first. Select the **Other Approvers** bar to view the next set of five approvers. Selecting this will update the entire dashboard, excluding approvers that appear with the higher number count.
Filters • **Days Since Created** • **Functional Category** • **Approval Transaction** • **Manager** • **Approver** • **Requestor**	This panel displays filters similar to those at the top of the page. Select filters and select the **Apply changes** button to update the visuals. See also Common Elements and Controls.
Count of Open Approval Requests grid	This grid displays the number of requests for an approval transaction and an approver. Select the **Notify Approver** link to send the approver a reminder to review the request.
Open Approval Request Details grid	This grid displays details on open approval requests, including the transaction type, approver, requestor, date of submission, and the number of days that have passed since the request was made. You can review the approval chain for a request as well as notify the approver to review the individual request.

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Visualization	Description
Approval Request by Functional Category horizontal bar chart	This visualization displays the number of pending cancelled, denied, and terminated approval requests by categories. The functional categories are defined on the Define Functional Category Page and Map Functional Category Page. It shows the top five (5) categories with the highest number of requests first. Select the **Other Categories** bar to view the next set of five categories. Selecting this will update the entire dashboard, excluding categories that appear with the higher number count.
Pending Approval Requests by Transaction horizontal bar chart	This visualization displays the number of pending cancelled, denied, and terminated approval requests by transaction. It shows the top five (5) transactions with the highest number of requests first. Select the **Other Categories** bar to view the next set of five categories. Selecting this will update the entire dashboard, excluding categories that appear with the higher number count.
Average Time to Complete horizontal bar chart	This visualization displays the average number of days it takes to approve requests, sorted by approval transaction type. The list shows the top ten highest durations.
Transaction Pending Approvals tag cloud	This tag cloud visualization displays the pending approval transactions. The bigger the font size, the larger the number of pending requests are associated with the transaction type. This tag cloud helps easily filter the entire dashboard by a specific pending approval type.
Approvals Requests Trend by Transaction graph	This visualization shows approval request trends by month and year (as of January 1), comparing how many approval requests have been submitted for a specific approval transaction. By default, the dashboard shows the last year of data.

Admin Approval Insights Tile

Administrators use the Admin Approval Insights tile to access and view analytics related to approval requests for the organization.

Navigation:

You can use personalizations to add the Admin Approval Insights tile to a homepage.

> **Note**
>
> You must be assigned the *HR Administrator* role to access the tile.

This example illustrates the Admin Approval Insights tile.

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This tile displays the number of pending approval requests for all approvers viewable to the logged in administrator.

Select this tile to access the Admin Approval Insights Dashboard.

Admin Approval Insights Dashboard

Administrators use the Admin Approval Insights dashboard to review and analyze approval data for the organization using visualizations.

Navigation

- Select the **Admin Approval Insights** option from the Insights Catalog Navigation Collection.

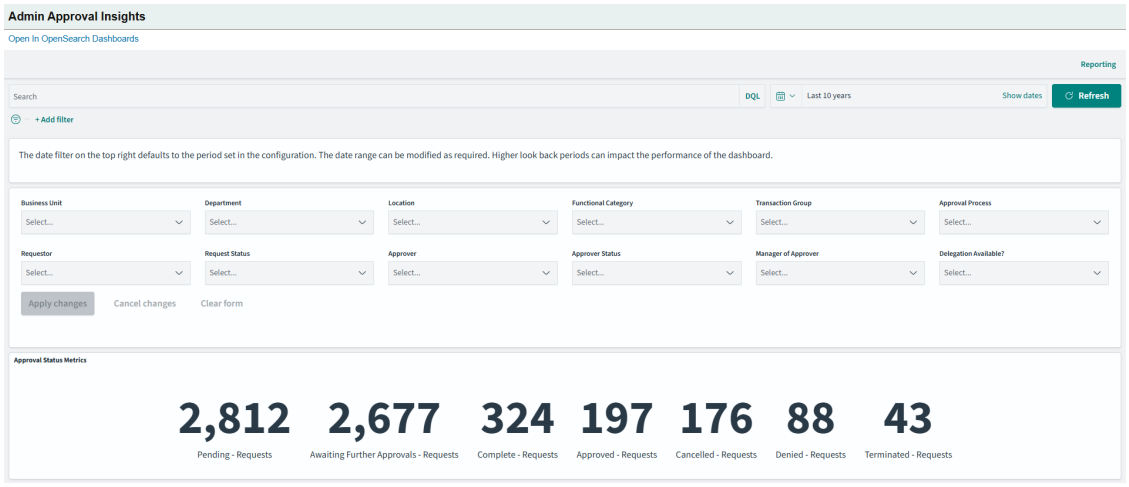
> **Note**
>
> You must be assigned the *Ins Cat Admin Approval Insight* role to access the dashboard through Insights Catalog.

- Select the **Admin Approval Insights tile** from the homepage you have added the tile

> **Note**
>
> You must be assigned the *HR Administrator* role to access the dashboard through the tile. Use personalizations to add the tile to a homepage.

This example illustrates the Admin Approval Insights dashboard (1 of 7).

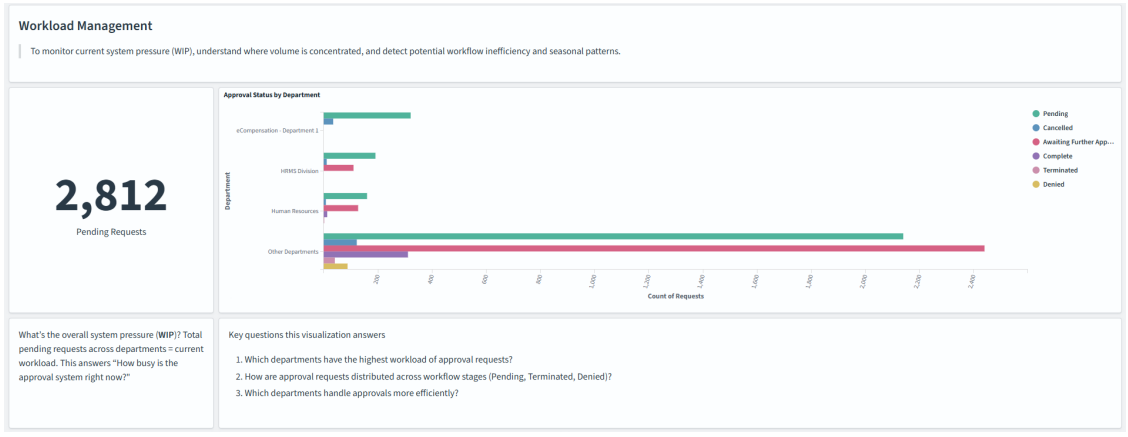
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This example illustrates the Admin Approval Insights dashboard (2 of 7).

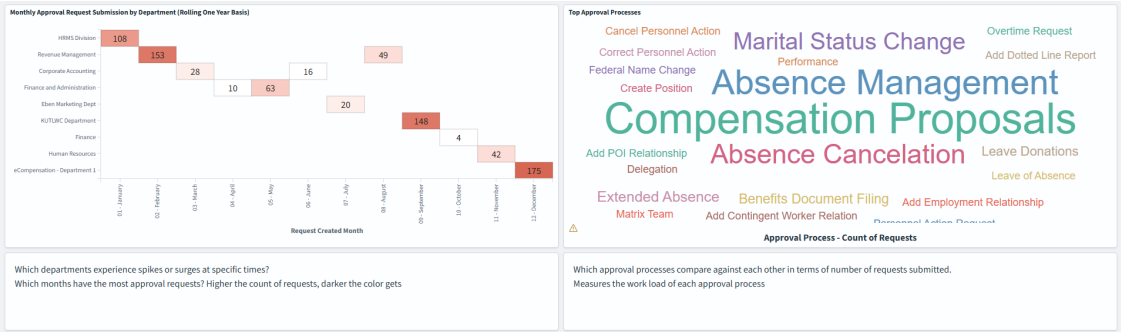


This example illustrates the Admin Approval Insights dashboard (3 of 7).

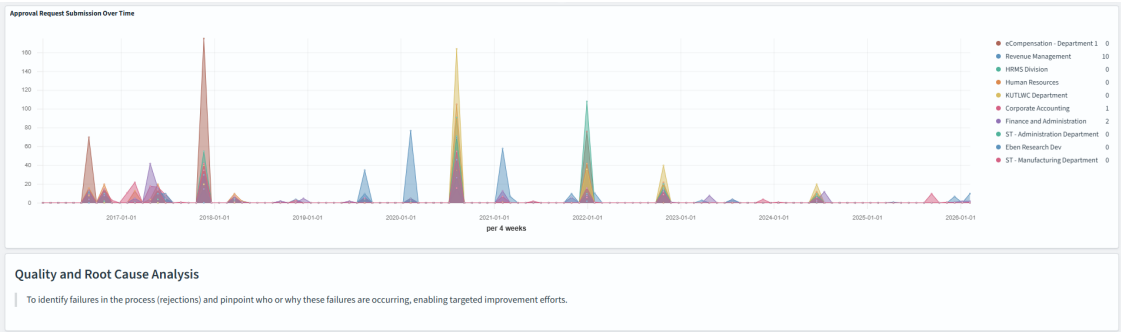


This example illustrates the Admin Approval Insights dashboard (4 of 7).

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This example illustrates the Admin Approval Insights dashboard (5 of 7).

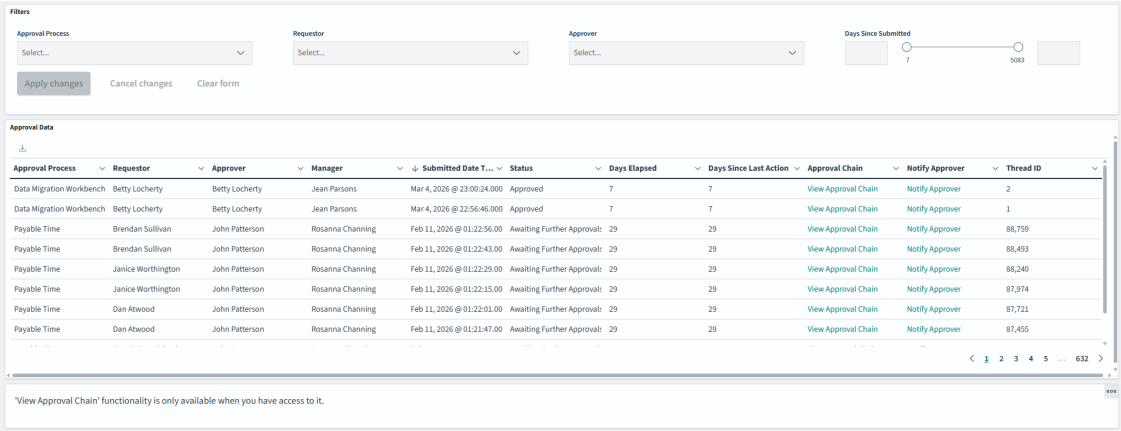


This example illustrates the Admin Approval Insights dashboard (6 of 7).



This example illustrates the Admin Approval Insights dashboard (7 of 7).

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> **Warning**
>
> PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

Admin Approval Insights - Filters

This section contains the following filters to sort data.

Field or Control	Description
Filters: • **Business Unit** • **Department** • **Location** • **Functional Category** • **Transaction Group** • **Approval Process** • **Requestor** • **Request Status** • **Approver** • **Approver Status** • **Manager of Approver** • **Delegation Available?**	Filters are applied by the order of filter fields. For example, by business unit, followed by department, then by location, then so on.

For a list of common filter controls available for the Admin Approval Insights dashboard, see the Common Elements and Controls section in this documentation.

Admin Approval Insights - Approval StatusMetrics

The metrics panel provides you with the following metric counts by approval statuses based on the filter criteria.

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Visualization	Description
Approval Status Metric: • **Pending Requests** • **Awaiting Further Approvals - Requests** • **Complete - Requests** • **Approved - Requests** • **Cancelled - Requests** • **Denied - Requests** • **Terminated - Requests**	This panel displays a count of the different approval statuses that fall within the specified filter criteria.

Performance and Efficiency Visualizations

The Performance and Efficiency section provides you with the following collection of interactive visualizations to gauge the overall speed of the approval process, measuring how effectively requests are moving through the system.

Visualization	Description
Average Days to Complete (By Department) horizontal bar graph	This visualization displays how long, on average, each department takes to complete the approval process.
Average Days to Complete by Approver horizontal bar graph	This visualization displays how long, on average, each approver takes to complete the approval process.

Workload Management Visualizations

The Workload Management section provides you with the following collection of interactive visualizations to monitor current workload, understand where volume is concentrated, and detect potential workflow inefficiency and seasonal patterns n the approval process.

Visualization	Description
Pending Requests metric	Displays a count of all pending request.
Approval Status by Department horizontal bar graph	This visualization displays a count of approvals by status for each department. The list displays departments by the largest number of approvals to smallest. Select a bar from the **Other Departments** item to view more departments.
Monthly Approval Request Submission by Department (Rolling One Year Basis) chart	This visualization displays which department had the highest number of approvals submitted for the month over the last 12 months. The count boxes appear dark when more requests re submitted.
Top Approval Processes tag cloud	This tag cloud visualization displays the pending approval transactions. The bigger the font size, the larger the number of pending requests are associated with the transaction type. This tag cloud helps easily filter the entire dashboard by a specific pending approval type.

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Visualization	Description
Approval Request Submission Over Time graph	This visualization shows approval request trends by month and year (as of January 1), comparing how many approval requests have been submitted for a specific approval transaction. By default, the dashboard shows the last 10 years of data.
Pending Approval Requests by Manager horizontal bar chart	This visualization displays the number of pending approval requests by manager. It shows the top five (5) managers with the highest number of requests first. Select the **Other Managers** bar to view the next set of five managers. Selecting this will update the entire dashboard, excluding managers that appear with the higher number count.
Denied Requests by Department horizontal bar chart	This visualization displays the number of denied approval requests by department to help identify which departments are rejecting requests most often. It shows the top departments with the highest number of denied requests first.
Filters	This panel displays filters similar to those at the top of the page. Select filters and select the **Apply changes** button to update the visuals.

Approval Data Grid

This section displays a detailed grid of employee's that meet the visualization specifications.

Field or Control	Description
 (export) icon • **Raw** • **Formatted**	Select to export data from the grid into a .csv file format.
Sort column heading	Select a column heading to sort grid rows by the column value in ascending or descending order.

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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. Select the Filter for value (+) icon to add the shown field value as a filter to all visualizations. For example, if you select to filter for a Department value, all visualizations will refresh to show employees for that department. Select the Filter out value (-) icon to remove the shown field value from the filter process for all visualizations. For example, if you select 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.
View Approval Chain link	View the approvers and status of a request.

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Setting Up and Working with Delegation

Understanding Delegation

Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

> **Note**
>
> A fluid version of the Delegation Framework is now available in Enterprise Components. For more information, see Enterprise Components: Understanding Delegation in the Enterprise Components product documentation.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority of managerial transactions to another person while away from the office.
- A senior executive does not have the time to process transactions and wants to delegate this authority to another person, such as an assistant.

Delegation Terminology

The following terms are important to the understanding of Delegation feature and are used throughout these topics:

Term	Definition
Delegation	The act of delegating one's authority to another user.
Delegator	A person that delegates authority to another user.
Proxy	A person granted authority to act on behalf of another user.
Delegate Initiation	The Delegation Framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.

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Term	Definition
Delegate Approvals	The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.
Delegated Authority	The rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	A request from the delegator to the proxy to take on delegated authority.
Delegation Period	The time range in which the delegated authority is in effect.
Delegation Administrator	The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
Revoke	When a delegator or delegation administrator withdraws delegated authority.

Delegation Framework (Classic)

The core of the Delegation feature is the Delegation framework. The Delegation framework manages a proxy's authority over a delegated transaction. When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy

> **Note**
>
> For Fluid Delegation Framework, please refer the Enterprise Components: Understanding Delegation section in the Setting Up and Working with Fluid Delegation chapter in the PeopleSoft Enterprise Components Online Help.

Integration with the Approval Framework

The Delegation framework integrates with the Approval Framework. This integration provides several benefits. First, the integration between the Delegation framework and Approval Framework makes the Approval Framework aware of delegated authorities in the system. Second, the Delegation framework uses the Approval Framework to manage the acceptance and rejection of delegation requests.

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Delegation Request Creation Through Self-Service

The Delegation framework is a component of the PeopleSoft HCM self-service solution. Users can create delegation requests for selected transactions through HCM self-services pages.

When creating a delegation request, the delegator can:

- Delegate only the transactions to which they have access.

  For example, an employee who is not a manager does not have access to manager self-service transactions and, therefore, cannot delegate manager-specific transactions.
- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transactions to different proxies.

Delegation Administration

Delegation administrators can use the administrative components for delegation to perform several useful tasks. They can:

- Create delegation requests on behalf of delegators through the Add Delegation Request component (HCDL_ADMIN_ADD_DLG).
- Review delegation requests and, if necessary, revoke them on behalf of delegators through the Administer Delegation component (HCDL_ADMIN_DLG).
- Process all delegation transactions in batch daily through the Maintain Delegated Authorities component (HCDL_BATCH).

Notifications

The system uses email and worklist notifications to notify managers and proxies of new delegation requests and transactions pending approval. The system creates a worklist item only on the proxy's worklist, not on the delegator's worklist (provided that you have set up worklist items as a preference for receiving notifications). The system sends email notifications for approval to the proxy and, if approval framework is configured correctly, the system also sends the delegator a courtesy email notification. Delegation administrators can use the Generic Templates component to configure different email templates for the proxy and delegator.

See Reviewing Delivered Notification Templates for Delegation.

> **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 Enterprise Components: Understanding Notification Composer.

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Requests Statuses and Delegation Statuses

The Delegation framework manages delegation requests through request statuses and delegation statuses. A request status defines the status of the delegation request. A delegation status defines whether a proxy's delegation authority is active or inactive. The combination of these two statuses determines how the Delegation framework handles delegations.

This table lists request statuses for delegation and describes how the Delegation framework handles a delegation depending on the delegation status associated with each request status:

Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to *Submitted* and delegation status to *Inactive.*
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to *Accepted.* The delegation status becomes *Active* only when the following two conditions occur: • The proxy accepts the delegation request. • The system date is greater than or equal to the **From Date** and less than or equal to the **To Date** of the delegation period. Once the delegation status becomes *Active,* the system reassigns all pending transactions from the delegator to the proxy. The system also assigns the proxy a temporary permission list and role for the transaction, which grants the proxy navigation access to the online transaction. If the **To Date** of the delegation request is blank, the request status remains *Active* until revoked by delegator or administrator.
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future-dated, the delegation status remains *Inactive* until the system date is greater than or equal to the **From Date.**
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to *Rejected.* The delegation status remains *Inactive.*

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Request Status	Delegation Status	Description
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to *Ended* and changes the delegation status to *Inactive.* This change occurs when the system date is greater than the **To Date** of the delegation authority period. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to *Revoked* and changes the delegation status to *Inactive.* The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.

Implementation Considerations for Delegation

When implementing Delegation functionality, you should consider the following:

The important considerations are:

- Should you enable delegation functionality?
- What transactions should you enable for delegation?
- What hierarchy should you enable for delegation?

You should also analyze the following security needs and create a plan that covers these needs:

- Analyze delivered permission lists and roles for delegation components to decide if the implementation will use the delivered objects or create new objects.
- Decide how to define a standard user profile for the delegation administrator that contains the relevant roles.
- Decide how to define a standard user profile for the delegator that contains the relevant roles.
- Decide how to define a standard user profile for the proxy that contains the relevant roles.

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- Decide if the delegator and proxy should have the same or different profiles.

Steps to Set Up Delegation

To implement transactions in the delegation framework:

1. Register delegation transactions for workflow on the Register Workflow Transactions page.
2. Set up delegation permission lists and roles through PeopleTools Security components.
3. Define installation settings for delegation on the Delegation Installation Settings page.
4. Configure transactions for delegation on the Configure Delegation Transactions page.

Navigating Delegation Components

The PeopleSoft HCM application provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

> **Note**
>
> In addition to the PeopleSoft HCM custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

This topic lists the pages used to navigate delegation components.

See *PeopleTools: Application Designer Developer's Guide*.

Pages Used to Navigate Delegation Components

This table lists the custom navigation pages that are used to navigate in the setup and administrative components for delegation functionality:

Page Name	Navigation	Usage
Delegation Setup Center	**Set up HCM**, and then **Common Definitions**, and then **Delegation**, and then **Delegation Setup Center**	Administrators can use the component links on this page to access the pages necessary to set up the Delegation framework for PeopleSoft HCM.
Approvals and Delegation	**Workforce Administration**, and then **Self Service Transactions**, and then **Approvals and Delegation**	Administrators can use the component links on this page to access the pages necessary to maintain delegation and to monitor approval transactions for PeopleSoft HCM.

Registering Workflow Transactions

This topic discusses how to register workflow transactions.

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Page Used to Register Workflow Transactions

Page Name	Definition Name	Usage
Workflow Transactions Page	HCM_EO_TXN	Register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Workflow Transactions Page

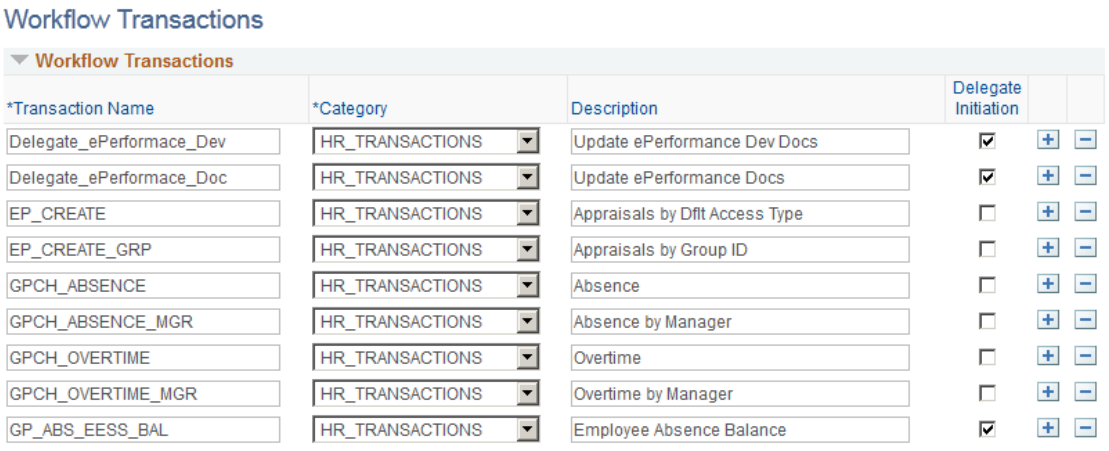
Use the Workflow Transactions page (HCM_EO_TXN) to register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category.

For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Navigation:

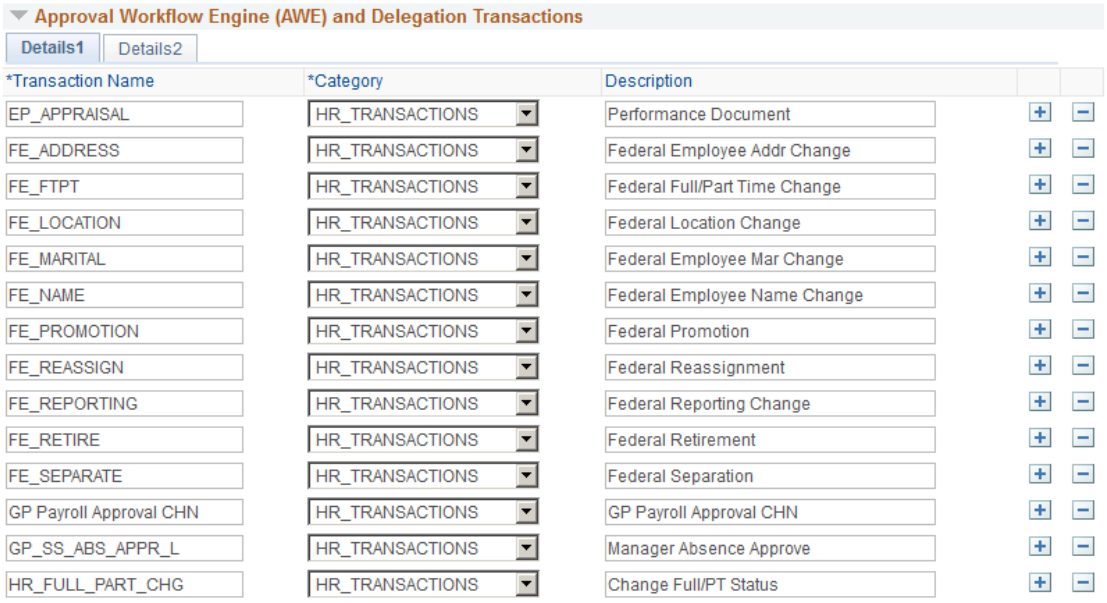
- **Set Up HCM**, and then **Common Definitions**, and then **Approvals**, and then **Approvals Setup Center**, and then **Workflow Transactions**, and then **Workflow Transactions**
- **Set Up HCM**, and then **Common Definitions**, and then **Approvals**, and then **Workflow Transactions**, and then **Workflow Transactions**

This example illustrates the fields and controls on the Workflow Transactions page (1 of 3). You can find definitions for the fields and controls later on this page.

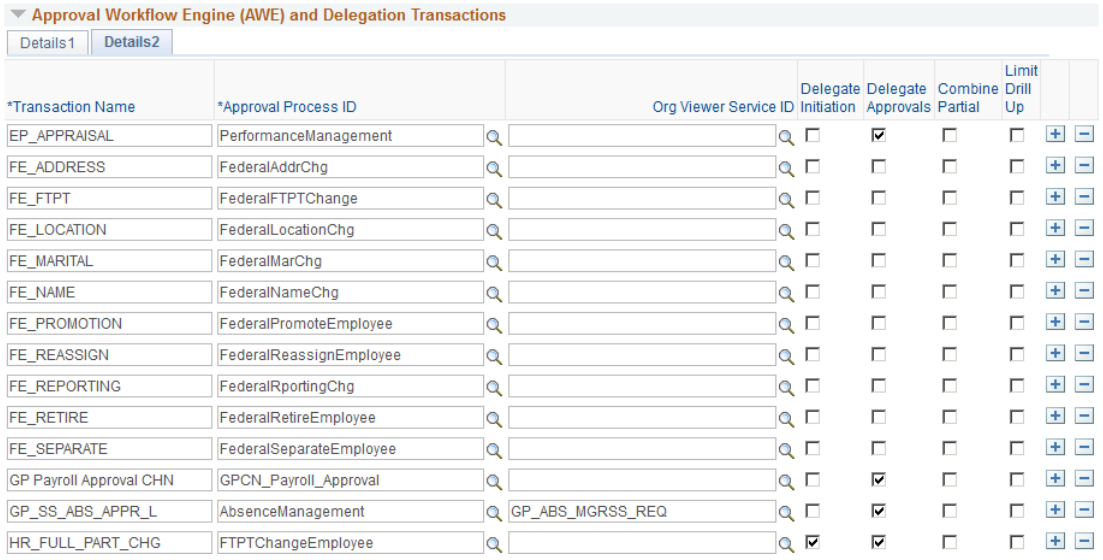


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This example illustrates the fields and controls on the Workflow Transactions page: Details1 tab (2 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Workflow Transactions page: Details2 tab (3 of 3). You can find definitions for the fields and controls later on this page.



> **Note**
>
> When implementing the Delegation framework, you must register all self-service transactions. Only the registered workflow transactions that you enable for delegation initiation or approval are available for subsequent delegation transaction setup.

See Linking Workflow Transactions.

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Setting Up Permission Lists and Roles for Delegation

These topics provide an overview of permission lists and roles for delegation and discuss how to set up permission lists and roles.

Understanding Permission Lists and Roles for Delegation

Before configuring delegation transactions, you must set up permission list and role security for your delegation transactions. The PeopleSoft HCM application delivers as system data several permission lists that are required for use of the Delegation framework. You can attach these permission lists to roles where needed to enable users access to delegation functionality.

This table describes the delivered permission lists for the Delegation framework:

Permission List Name	Description	Roles Assigned to Permission List
HCCPDL1000	Enables users to access the delegation setup components that are part of the Delegation Setup Center page and the delegation administrative components that are part of the Approvals and Delegation page.	HCM Delegation Admin (administrator)
HCCPDL1100	Enables users to access the Manage Delegation page, which is the home page for self-service transactions.	Manager Employee

In addition to permission lists, you need to define the delegation administrator role and assign the HCCPDL1000 permission list to it. Once assigned to a user, this role enables that designated delegation administrator access to the delegation setup and administrative components. The PeopleSoft HCM system delivers the HCM Delegation Admin role as system data for this purpose. This role already has the HCCPDL1000 permission list assigned to it.

PeopleSoft HCM applications that use delegation functionality deliver many transactions that are preconfigured for the Delegation framework. These transactions are preconfigured with a unique permission list and role for each component where the proxy can perform the delivered delegated transaction. When a proxy status becomes active, the system inserts the unique role for that delegation transaction into the proxy's user profile. The role contains the permission list that enables the proxy access to the component for performing the delegated transaction. When the proxy status becomes inactive, the system removes that role from the proxy's user profile. To configure delegation transactions, use the Configure Delegation Transaction page to associate to the transaction the unique role and the component where the transaction is performed. The unique permission list is associated with the role in PeopleTools security.

See Configuring Delegation Transactions.

When configuring transactions for delegation you must use a unique role and permission list for each component that you associate with a delegated transaction. You must attach the permission list to portal security for the component and associate the unique role with the unique permission list. You might also need to run the Portal Security Sync process **(PeopleTools**, and then **Portal**, and then **Portal Security Sync)** to ensure that the permission list is associated with the portal navigation.

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> **Warning**
>
> Do not use an existing role to configure a delegation transaction because the delegation framework grants and revokes the role from the proxy's security profile according to the proxy's delegated authority over a transaction. This will cause a proxy who already has access to the specified component to lose access to that component entirely when the delegation framework revokes the delegated authority.

Related Topics

- Configuring Delegation Transactions
  These topics provide an overview of delivered delegation transactions and discuss how to configure delegation transactions.

Setting Up Permission Lists and Roles

Set up permission list and role security for your delegation transactions.

See *PeopleTools: Security Administration*.

Defining Delegation Installation Settings

This topic discusses how to define delegation installation settings.

Page Used to Define Delegation Installation Settings

Page Name	Definition Name	Usage
Delegation Installation Settings Page	HCDL_SYS_SETUP	Define delegation installation settings. This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.

Delegation Installation Settings Page

Use the Delegation Installation Settings page (HCDL_SYS_SETUP) to define delegation installation settings.

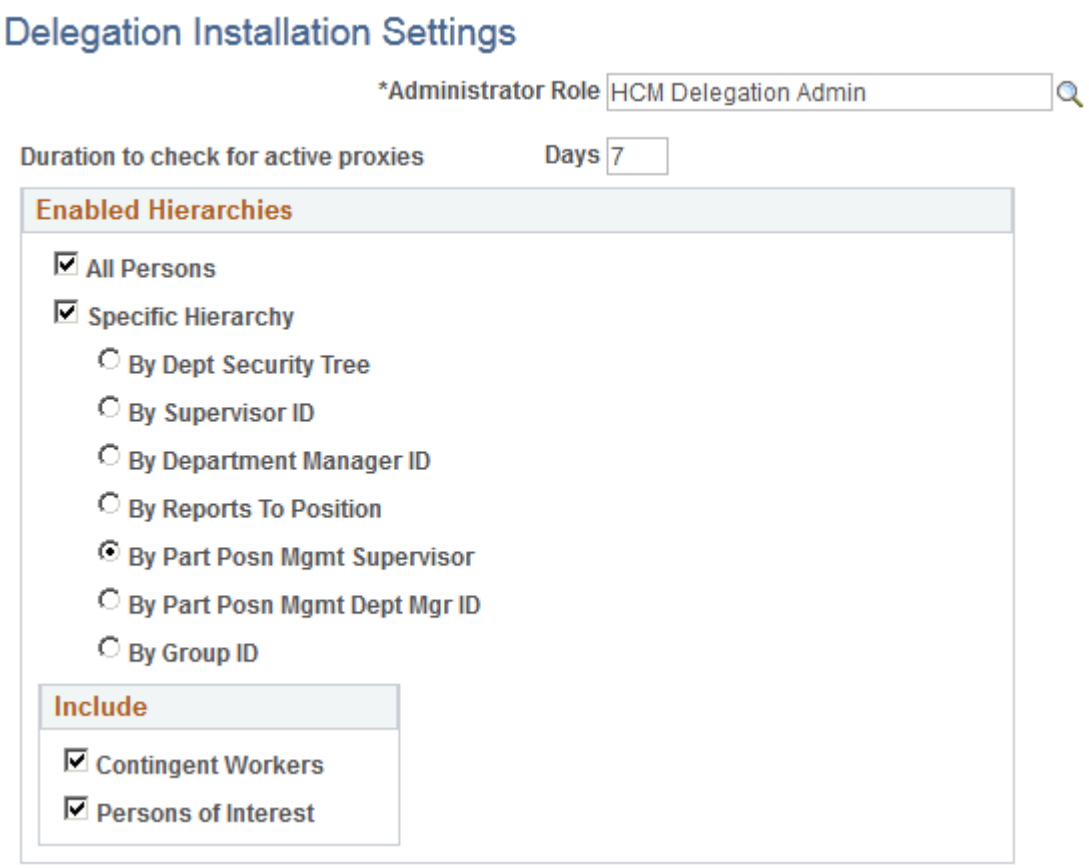
This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Delegation**, and then **Delegation Setup Center**, and then **Installation Settings**, and then **Delegation Installation Settings**
- **Set Up HCM**, and then **Common Definitions**, and then **Delegation**, and then **Installation Settings**, and then **Delegation Installation Settings**

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

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Field or Control	Description
Administrator Role	Select the role that you want to designate as the delegation administrator. The delegation framework routes errors to this role. The PeopleSoft system delivers the HCM Delegation Admin role as system data for this purpose. You can select that role or any other role.

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Field or Control	Description
Duration to check for active proxies and **Days**	Enter the number of days that you want the Maintain Delegated Authority Application Engine process to add to the system date when checking whether a proxy is active in the job data record or equivalent record for persons of interest. Delegation administrators can run this process from the Maintain Delegated Authority page. Checking for proxy availability is particularly important when using open-ended delegations. An open-ended delegation is when the delegator leaves the **To Date** field blank on the Enter Dates page when creating a delegation request through self-service. By default, the system uses *7* days. If you leave the field blank or enter *0*, then upon saving the component the system automatically sets the value to *7*. In this example, when delegation administrators run the batch job, the process adds seven days to the system data and checks for proxy availability on that date.

Enable Hierarchies

Use this group box to define options for how self-service users can select a proxy when delegating a transaction. Your selections here determine the available proxies that the system displays on the Select Proxy By Hierarchy page when users create delegation requests. These settings apply to all transactions that are using the Delegation framework. For example, you cannot specify that the system display available proxies for time-off requests by supervisor ID and available proxies for promotions by **Reports To Position.**

Field or Control	Description
All Persons	Select this check box to enable open selection of the proxy when users are creating a delegation request. The system displays the **Search by Name** link on the Select Proxy By Hierarchy page. When users click this link, the system displays the Select Proxy By Name page, where users can search for and select as proxy any active person in the system with a Job Data record. By default, the system selects this check box.

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Field or Control	Description
Specific Hierarchies	Click this check box to require delegators to select a proxy based on a specific hierarchy. You can only select one hierarchy. The hierarchy that you select applies to all delegation requests across the system regardless of the transaction type. When self-service users search for a proxy by hierarchy, they can search up the hierarchy as well as down the hierarchy. Your choices are: • *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree. • *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user. • *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department. • *By Reports To Position:* Defines the reporting relationship based on information in the **Reports To** field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position. This option is available only if you have enabled the Manage Positions business process on the Installation Table - HCM Options page. • *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** values first, and then for **Supervisor ID** values. This option is available only if you have enabled the Manage Positions business process on the Installation Table - HCM Options page. • *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

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Field or Control	Description
	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** values first, and then for **Department Manager ID** values. • *By Group ID:* Determines data access using the group ID set up in the Group Build feature. If you select this option, you must select a valid group ID in the field that the system displays to the right. You define group IDs using the Group Build Definition component. These hierarchies relate to direct reports functionality and are the same as those found in the **Access Type** field on the Target Information page of the Direct Reports Setup component. If you select the **Specific Hierarchies** check box and the **All Persons** check box, then this hierarchical selection of proxy becomes a preference rather than a requirement because the delegator has the option to either select from the list or search for any active proxy in the system.

Include

Select the organizational relationships that should be included in the list of current people when performing a delegation. Persons with the relationship of *Employee* are automatically included in the list, however you can also choose to include the following people when they are active with a Job Data record.

- **Contingent Workers**
- **Persons of Interest**

Configuring Delegation Transactions

These topics provide an overview of delivered delegation transactions and discuss how to configure delegation transactions.

> **Note**
>
> A fluid version of the Delegation Framework is now available in Enterprise Components. For more information, see Enterprise Components: Configuring Delegation Transactions in the Enterprise Components product documentation.

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Page Used To Configure Delegation Transactions

Page Name	Definition Name	Usage
Configure Delegation Transaction Page	HCDL_TXN_SETUP	Configure transactions for delegation. This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Understanding Delivered Delegation Transactions

The PeopleSoft application delivers many transactions that are preconfigured for the Delegation framework and accessible through the Configure Transaction component. This table lists the delivered delegation transactions and their configuration:

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
Delegate_ePerformance_Dev	delegate_ePerformaceDevDoc_Upd	EP_CURRENT_MY_DVL	Delegate the ability to update development documents.
Delegate_ePerformance_Doc	delegate_ePerformaceDoc_Update	EP_CURRENT_MY_PRF	Delegate the ability to update performance documents.
EP_APPRAISAL	Delegate_PerformancDoc_Approve	EP_APPRAISAL_APPR	Delegate the approval of performance documents.
GP_ABS_EESS_BAL	Delegate Employee Absence Bal	GP_ABS_EESS_BAL	Delegate the initiation of employee absence balance inquiries.
GP_ABS_EESS_HIST	Delegate Employee Absence Hist	GP_ABS_EESS_HIST	Delegate the initiation of employee absence history inquiries.
GP_ABS_EESS_REQ	Delegate Employee Absence Rqst	GP_ABS_EESS_REQ	Delegate the initiation of employee absence requests.
GP_ABS_MGRSS_BAL	Delegate Manager Absence Bal	GP_ABS_MGRSS_BAL	Delegate the initiation of manager absence balance inquiries.
GP_ABS_MGRSS_HIST	Delegate Manager Absence Hist	GP_ABS_MGRSS_HIST	Delegate the initiation of manager absence history inquiries.
GP_ABS_MGRSS_REQ	Delegate Manager Absence Rqst	GP_ABS_MGRSS_REQ	Delegate the initiation of manager absence requests.
GP_SS_ABS_APPR_L	Delegate Manager Absence Appr	GP_SS_ABS_APPR_L	Delegate the approval of manager absence requests.

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Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HGA_ESS_ABS_BALANCE_FLU	Delegate Empl Abs Bal Fluid	HGA_SS_BAL_FLU	Delegate the initiation of employee absence balance inquiries in fluid.
HGA_ESS_ABS_CANCEL_FLU	Delegate Empl Abs Cancel Fluid	HGA_SS_REQCAN_FLU	Delegate the initiation of employee absence cancellations in fluid.
HGA_ESS_ABS_HISTORY_FLU	Delegate Empl Abs Hist Fluid	HGA_SS_REQHIST_FLU	Delegate the initiation of employee absence history inquiries in fluid.
HGA_ESS_ABS_REQUEST_FLU	Delegate Empl Abs Req Fluid	HGA_SS_REQ_FLU	Delegate the initiation of employee absence requests in fluid.
HGA_SS_MBAL_FLU	Delegate Manager Abs Bal Fluid	HGA_SS_BAL_FLU	Delegate the initiation of manager absence balance inquires in fluid.
HGA_SS_MREQCAN_FLU	Delegate Mrg Cancel Abs Fluid	HGA_SS_REQCAN_FLU	Delegate the initiation of manager absence cancellations in fluid.
HGA_SS_MREQHIST_FLU	Delegate Mrg Abs Hist Fluid	HGA_SS_REQHIST_FLU	Delegate the initiation of manager absence history inquiries in fluid.
HGA_SS_MREQ_FLU	Delegate Manager Abs Req Fluid	HGA_SS_REQ_FLU	Delegate the approval of manager absence requests in fluid.
HR_CP_CAREERPLAN	Delegate Manage Career Plan	HR_CP_REDIRECT	Delegate the initiation of manager career plans.
HR_CP_MGR_PRO_CHART	Delegate Career Prog Chart	HR_CP_REDIRECT_CHA	Delegate the initiation of employee career progression charts.
HR_EE_INF_MGR	Delegate_View_Employee_Info	HR_EE_INF_MGR	Delegate the initiation of employee information inquiries.
HR_FULL_PART_CHG (Approve)	Delegate_FullPart_Approve	HR_FULLPART_APPR	Delegate the approval of changes in full-time and part-time status.
HR_FULL_PART_CHG (Initiate)	Delegate_FullPartStat_Initiate	HR_MGR_FULL_PART	Delegate the initiation of changes in full-time and part-time status.
HR_LOCATION_CHANGE (Approve)	Delegate_GSS_Approve	HR_MSS_CT_APPR	Delegate the approval of location changes in Guided Self Service.
HR_LOCATION_CHANGE (Initiate)	Delegeate_GSS_Initiate	HR_MSS_CT_FL	Delegate the initiation of location changes in Guided Self Service.
HR_LOCATION_CHG (Approve)	Delegate_Location_Approval	HR_MGR_LOC_APPR	Delegate the approval of location changes.

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Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HR_LOCATION_CHG (Initiate)	Delegate_LocChange_Initiate	HR_MGR_LOCATION	Delegate the initiation of location changes.
HR_PROMOTION (Approve)	Delegate_Promotion_Approve	HR_PROMOTE_APPR	Delegate the approval of promotions.
HR_PROMOTION (Initiate)	Delegate_Promotion_Initiate	HR_PROMOTE_MGR	Delegate the initiation of promotions.
HR_REPORT_CHG (Approve)	Delegate_ReportingChg_Approve	HR_MGR_REPORT_APPR	Delegate the approval of reporting changes.
HR_REPORT_CHG (Initiate)	Delegate_ReportingChg_Initiate	HR_MGR_REPORT_CHNG	Delegate the initiation of reporting changes.
HR_RETIRE (Approve)	Delegate_Retire_Approve	HR_RETIRE_APPR	Delegate the approval of employee retirements.
HR_RETIRE (Initiate)	Delegate_Retire_Initiate	HR_RETIRE_EE	Delegate the initiation of employee retirements.
HR_TBH_JOB	Delegate Add TBH	HR_TBH_JOB	Delegate the initiation of a template-based hire for an end-user.
HR_TBH_STATUS	Delegate TBH Status	HR_TBH_STATUS	Delegate the initiation of template-based hire statuses.
HR_TERM (Approve)	Delegate_Terminate_Approve	HR_EE_TERM_APPR	Delegate the approval of employee terminations.
HR_TERM (Initiate)	Delegate_Terminate_Initiate	HR_EE_TERMINATE	Delegate the initiation of employee terminations.
HR_TRANSFER (Approve)	Delegate_Transfer_Approve	HR_TRANSFER_APPR	Delegate the approval of transfers.
HR_TRANSFER (Initiate)	Delegate_Transfer_Initiate	HR_TRANSFER_MGR	Delegate the initiation of transfers.
JobOffer	Delegate_JobOffer_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job offers.
JobOpening	Delegate_JobOpening_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job openings.
TL_MSS_EE_SECH_PRD (Approve)	Delegate Manage AppRpt Time	TL_MSS_EE_SRCH_PRD	Delegate the approval of managing reported time.
TL_MSS_EE_SECH_PRD (Initiate)	Delegate Manage Report Time	TL_MSS_EE_SRCH_PRD	Delegate the initiation of managing reported time.
TL_OT_MNGR_LIST (Approve)	Delegate Approve Overtime	TL_OT_HISTORY_LIST	Delegate the approval of overtime.
TL_OT_MNGR_LIST (Initiate)	Delegate Manage Overtime Req	TL_OT_MNGR_LIST	Delegate the initiation of overtime requests.
TL_SRCH_APPRV_GRP	Delegate Manage App Pay Time	TL_SRCH_APPRV_GRP	Delegate the approval of payable time.

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Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
WCSCompConfirmer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of confirming compensation proposals.
WCSCompReviewer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of reviewing compensation proposals.
WCSCompSubmitter	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of submitting compensation proposals.
WCS_ECM_AWE_HOME	Delegate Approve Compensation	WCS_ECM_AWE_HOME	Delegate the approval of compensation.
W3EB_APPR_SUMMARY	Delegate Manage Appr Document	W3EB_APPR_SUMMARY	Delegate the approval of life event documents.

Note

For more information about application-specific delegation transactions, refer to the application-specific documentation.

Configure Delegation Transaction Page

Use the Configure Delegation Transaction page (HCDL_TXN_SETUP) to configure transactions for delegation.

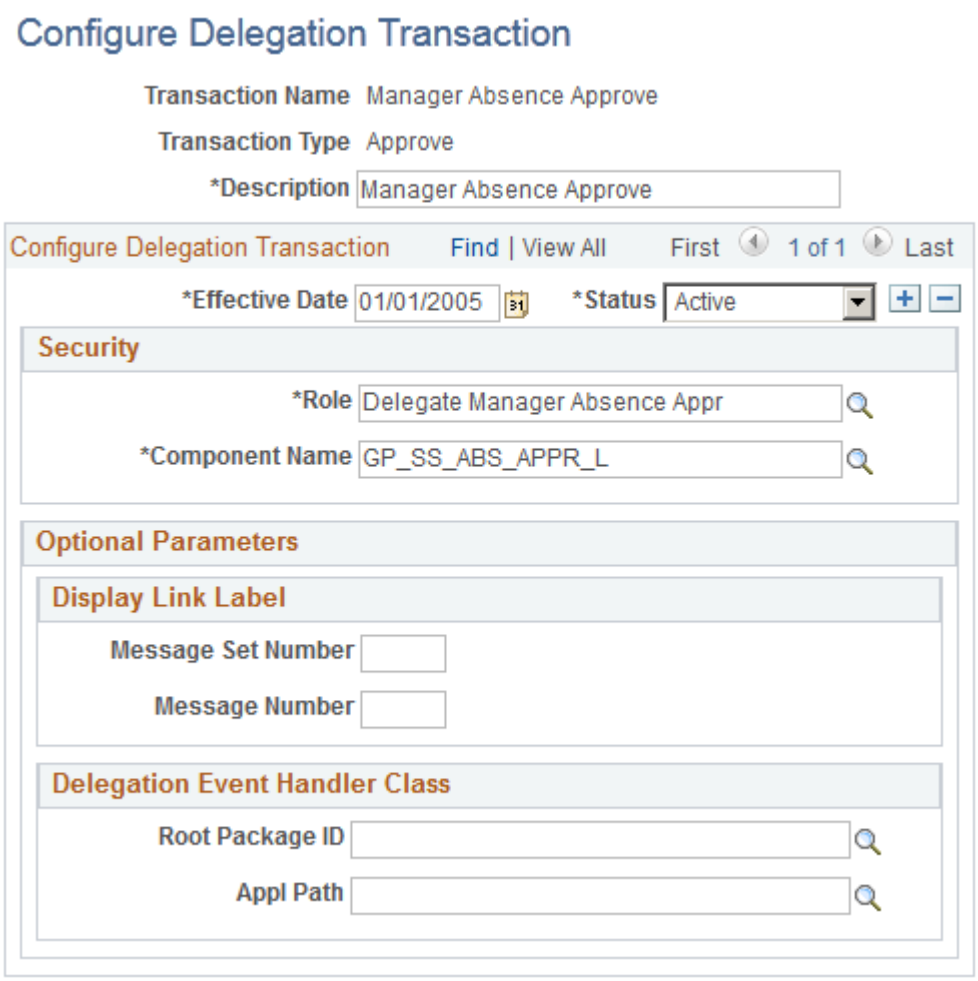
This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Delegation**, and then **Delegation Setup Center**, and then **Configure Transactions**, and then **Configure Delegation Transaction**
- **Set Up HCM**, and then **Common Definitions**, and then **Delegation**, and then **Configure Transactions**, and then **Configure Delegation Transaction**

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

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Field or Control	Description
Transaction Name	Displays the name of the transaction. If you are adding a new value, the system prompts you to select a value from the list of transactions that have been configured for workflow *and* selected for delegation initiation or approval on the Workflow Transactions page. Transactions that do not meet these criteria are not available for delegation configuration.

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Field or Control	Description
Transaction Type	Displays whether the configuration of the transaction is for delegation initiation or approval. The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. If you are adding a new value, the system prompts you to select either: • *Initiate:* Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf. • *Approve:* Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf. Although both options are available for the selected transaction, the value that you select is valid only if you have selected the corresponding **Delegate Initiation** or **Delegate Approvals** check box on the Workflow Transactions page.
Description	Enter the description of the delegation transaction configuration. The system uses this description throughout the delegation pages when displaying related transactions. As a default, the system uses the concatenation of the transaction type and transaction name. We strongly recommend that you always assign a meaningful description.
Effective Date and **Status**	Enter the effective date of the transaction and whether it is active or inactive within the Delegation framework. By entering new effective-dated rows, you can enable or disable the transaction, as necessary. When entering a new row, the system uses the system date for the effective date by default.

Security

Use this group box to establish security access for proxies that are delegated authority to the given transaction. While a delegation transaction is active, the Delegation framework temporarily assigns the specified role to the proxy and grants the proxy access to the specified component.

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Field or Control	Description
Role	Select the role that contains the permission list for the relevant component where one processes the given transaction. Each transaction that you enable for delegation must have a unique role and associated permission list that are solely for delegation purposes. When a proxy's delegated authority becomes active, the system temporarily assigns this role to the proxy's user profile so that the proxy can access the transaction component while having delegation authority. When the proxy's delegation authority ends, the system deletes this role from the proxy's user profile. Thus, the proxy no longer has access to the transaction component. If an approval transaction requires that the approver be in a particular role, then the proxy who is delegated authority over that transaction must have the same role to approve the transaction. For example, if promotion approval requires that the approver be a manager, then the proxy who is delegated authority to approve promotions must also be a manager to successfully approve a promotion request. This field prompts from roles set up in the Roles component. **Note:** You must use a unique role for each component that you associate with a delegated transaction. See Understanding Permission Lists and Roles for Delegation.
Component Name	Select the object name of the component where users can process requests for the given transaction. When a user creates a delegation request, the system checks the delegator's user profile to determine if the delegator has the authority to access this component. The system permits the creation of a delegation request for the transaction only if the delegator has security access.

Optional Parameters

Use this group box when you need to create a link on the Delegation pages that will take the user to a product specific page to complete the delegation process.

Use the **Display Link Label** fields for retrieving the link labels from the message catalog.

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Field or Control	Description
Message Set Number and **Message Number**	Enter the number that will identify the label that should be used for the link that will appear on the Delegation Detail page. This label is maintained at the product specific **Note:** For more information about application-specific message numbers, refer to the application-specific documentation.

Use **Delegation Event Handler Class** fields to identify the product specific application classes.

Field or Control	Description
Root Package ID	Select the application package that owns the component to which the person will be directed when he or she clicks the link in the Delegation pages.
Path	Enter the class that will take the user to the product specific component to finished the delegation process.

Adding Delegation Requests by Administrator

This topic discusses how to add delegation requests by administrator.

Page Used to Add Delegation Requests by Administrator

Page Name	Definition Name	Usage
Add Delegation Request Page	HCDL_ADMIN_ADD_DLG	Add delegation requests that administrators create on behalf of delegators.

Add Delegation Request Page

Use the Add Delegation Request page (HCDL_ADMIN_ADD_DLG) to add delegation requests that administrators create on behalf of delegators.

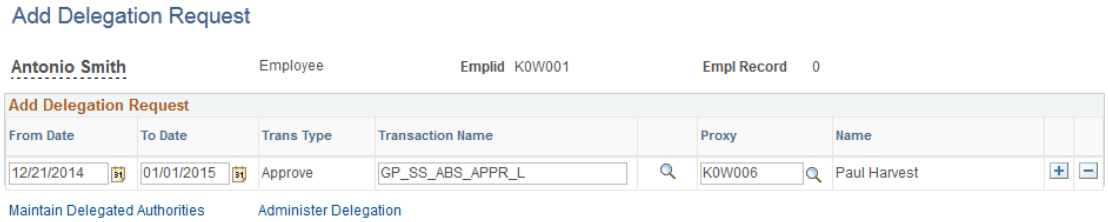
> **Note**
>
> This page has been replaced by the Delegation feature in Fluid. For more information, see Enterprise Components: Working with Self-Service Delegation.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Approvals and Delegation**, and then **Add Delegation Request**, and then **Add Delegation Request**

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



> **Note**
>
> To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

> **Note**
>
> When a user adds a delegation request, the system checks for an **Alternate User ID** field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

Field or Control	Description
From Date and **To Date**	Enter the date range for which you want the delegation to be active. The **From Date** value must be greater than today's date. The **To Date** value must be greater than the **From Date** value. If you want to make the delegation open-ended, leave the **To Date** field blank.
Trans Type (transaction type) and **Transaction Name**	Select the transaction that is being delegated. The system prompts you to select from only the transactions for which the delegator has access. The transactions must be active for the specified date range of the delegation, as defined on the Configure Delegation Transaction page. The system displays whether the selected transaction is for delegation initiation or approval.
Proxy and **Name**	Select the proxy to whom the delegator wants to delegate the transaction.
Maintain Delegated Authorities	Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.

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Field or Control	Description
Administer Delegation	Click this link to access the Administer Delegation page, where you can search for and manage individual delegation requests in the system.
Product specific link	Select the product specific link for a transaction to have the system open the product specific component to complete the delegation request. The product specific component will have a check box to indicate that it is OK to submit the delegation request or not. If it is OK, then the delegation request will be submitted. If it is not OK, then the delegation request will not be submitted. This link is available when the **Optional Parameters** section of the Configure Delegation Transaction page for the transaction is configured to have further product specific delegation requirements. The label of the link comes from message catalog as specified on Configure Delegation Transaction page. When no information is entered in the **Optional Parameters** section of the Configure Delegation Transaction page, the link is not available.

Administering Delegations

This topic discusses how to administer delegations.

Pages Used to Administer Delegations

Page Name	Definition Name	Usage
Administer Delegation Page	HCDL_ADMIN_DLG	Administer delegation requests. Administrators can review delegation requests and, if necessary, revoke them on behalf of delegators.
Administer Delegation - Request Details Page	HCDL_ADMIN_RQT_DTL	Delegation administrators can review details of a selected delegation request.

Administer Delegation Page

Use the Administer Delegation page (HCDL_ADMIN_DLG) to administer delegation requests.

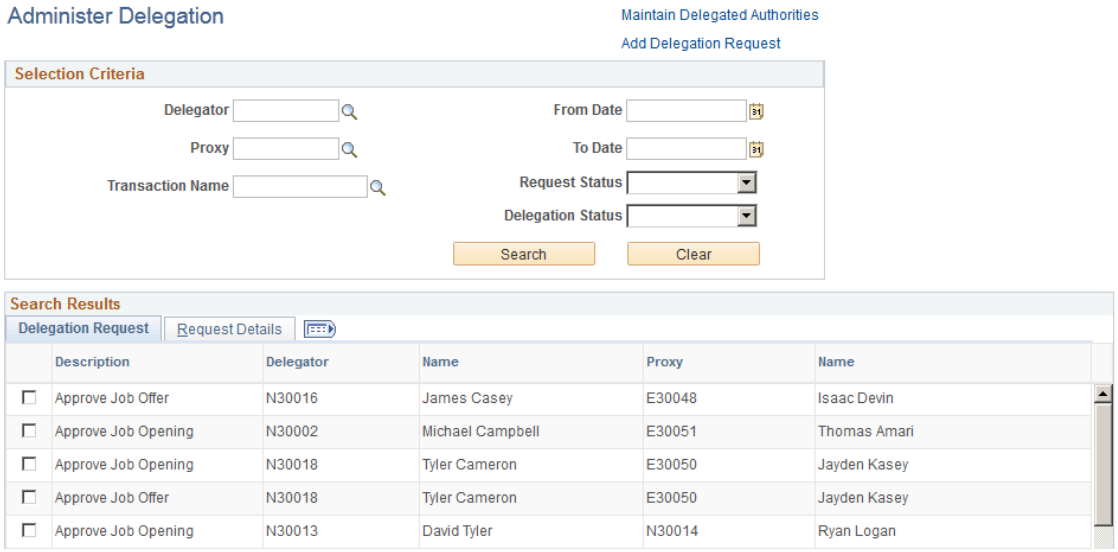
Administrators can review delegation requests and, if necessary, revoke them on behalf of delegators.

Navigation:

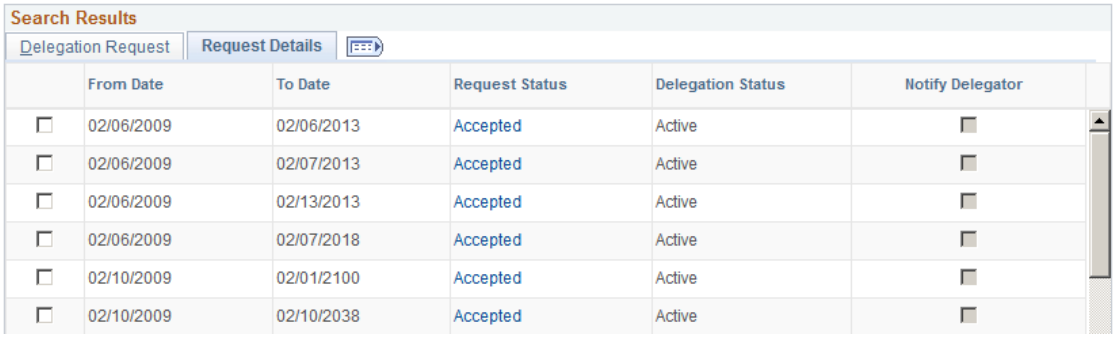
Workforce Administration, and then **Self Service Transactions**, and then **Approvals and Delegation**, and then **Administer Delegation**, and then **Administer Delegation**

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This example illustrates the fields and controls on the Administer Delegation page: Delegation Request tab. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Administer Delegation page: Request Details tab. You can find definitions for the fields and controls later on this page.



> **Note**
>
> If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Field or Control	Description
Maintain Delegated Authorities	Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.
Add Delegation Request	Click this link to access the Add Delegation Request page, where you can create delegation requests on behalf on delegators.

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Selection Criteria

Use this group box to specify criteria for the delegation requests that you want to retrieve. To retrieve all delegation requests, click the **Search** button without specifying criteria. To narrow your search results, enter one or more criteria.

Field or Control	Description
Delegator	Enter the delegator for whom you want to retrieve delegation requests. The system prompts you to select from delegators with existing requests.
Proxy	Enter the proxy for whom you want to retrieve delegation requests. The system prompts you to select from proxies with existing requests.
Transaction Name	Enter the transaction for which you want to retrieve delegation requests. The system prompts you to select from transactions that are part of existing requests.
From Date and **To Date**	Specify the specific from or to date for which you want to review delegation requests.
Request Status	Select the status of the requests that you want to retrieve. Request statuses are *Accepted, Ended, Rejected, Revoked,* and *Submitted.* See Understanding Delegation.
Delegation Status	Select the delegation status of the requests that you want to retrieve, either *Active* or *Inactive.* See Understanding Delegation.
Search	Click this button to retrieve delegation requests based on your selection criteria.
Clear	Click this button to deselect all selection criteria fields.

Search Results

The system displays delegation requests and details based on your search criteria.

Field or Control	Description
Request Status	The system displays the status of the request on the Request Details tab: *Accepted,Ended, Rejected, Revoked,* and *Submitted.* Click this link to review further details of a delegation request. The system displays the Administer Delegation - Request Details page.
Select All	Click this button to select the check boxes for all delegation requests in the search results.
Deselect All	Click this button to deselect all check boxes for the selected delegation requests in the search results.

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Field or Control	Description
Revoke	Click this button to revoke a delegation request on behalf of the delegator. The system revokes delegations for all requests that are selected in the search results. The system sends a notification to the proxy who is affected by the change and automatically reassigns all pending transactions back to the delegator.

Processing Batch Delegation Requests

This topic discusses how to process batch delegation requests.

Page Used to Process Batch Delegation Requests

Page Name	Definition Name	Usage
Maintain Delegated Authority Page	HCDL_BATCH	Process batch delegation requests in a daily batch.

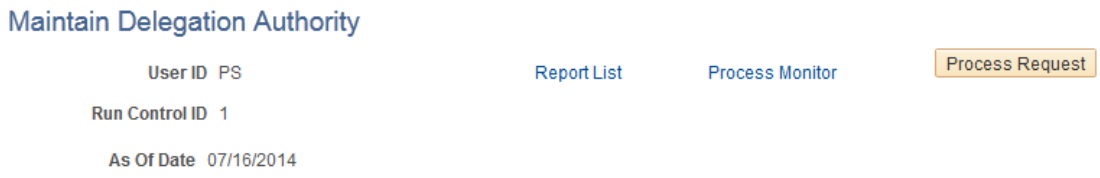
Maintain Delegated Authority Page

Use the Maintain Delegated Authority page (HCDL_BATCH) to process batch delegation requests in a daily batch.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Approvals and Delegation**, and then **Maintain Delegated Authorities**, and then **Maintain Delegated Authority**

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



Click the **Process Request** button to run the Maintain Delegated Authority (HCDL_BATCH) Application Engine process. This batch program processes all delegation transactions as of the system date that appears on the run control page. The process activates all delegation transactions that were future-dated to become active on today's date, revokes all delegation requests that have expired as of today's date, and searches for inactive proxies. For all affected delegation transactions, the process updates the request status and delegation status as appropriate. The process also updates proxy navigation security, as needed.

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Important

Run this process daily to maintain delegations and update invalid rows.

Working with Self-Service Delegation

These topics discuss working with self-service delegation.

Important

The Delegation functionality is now available in Fluid to allow users to create and manage delegation transactions. For more information, refer to Enterprise Components: Working with Self-Service Delegation.

Pages Used to Work With Self-Service Delegation

Page Name	Definition Name	Usage
#unique_891	HCDL_MGR_DLG_HOME	View delegation activity associated with a user.
Manage Delegation - Learn More about Delegation Page	HCDL_DLG_INSTR	View help for delegation. Users can view an instructive description of delegation functionality.
Create Delegation Request - Select Job Title Page	HCDL_JOB_SELECTION	Select the job for a delegation request. Users with multiple jobs can select the job for which they want to create the delegation request or review their proxies.
Create Delegation Request - Enter Dates Page	HCDL_ADD_DLG_DATES	Enter delegation dates by specifying the **From Date** and **To Date**, which defines the delegation authority period for a transaction. By not specifying a **To Date**, users specify an open-ended delegation.
Create Delegation Request - Select Transactions Page	HCDL_ADD_DLG_TXNS	Select transactions for delegation. Users can select one or more transactions to delegate.
Create Delegation Request - Select Proxy by Hierarchy Page	HCDL_ADD_DLG_SRCH	Select a proxy by reporting hierarchy. Users can select a proxy for the transactions being delegated based on their reporting hierarchy.

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Page Name	Definition Name	Usage
Create Delegation Request - Select Proxy By Name Page	HCDL_ADD_DLG_SRCH	Select a proxy by name. Users can search for and select a proxy for the transactions being delegated based on name.
Create Delegation Request - Delegation Detail Page	HCDL_ADD_DLG_DTL	Submit a delegation request. Users can review the details of a delegation request and then submit the delegation request.
Create Delegation Request - Confirmation Page Reject Delegation Request Page Accept Delegation Request Page	HCDL_DLG_CONFIRM	View the confirmation of the delegation request submission, the acceptance of a delegation request, or the rejection of a delegation request.
My Proxies Page	HCDL_MGR_DLGT	Manage proxies for delegation. Users can manage their proxies by search for and updating the status of their delegation requests.
Delegation Request Details Page	HCDL_REQUEST_DTL	View delegation request details. Users can review the details of a submitted delegation request.
My Delegated Authorities Page	HCDL_MGR_DLGT	Manage delegated authorities. Users can accept or reject the delegation requests for which they have been selected to serve as proxy. **Note:** In some cases, there may be manager self-service pages that you do not typically have permission to access. In these cases, after accepting a delegation request, log off the system and back in to access the manager self-service pages.
Multiple Transactions Page	HCDL_MULTI_TXNS	View details of the multiple transactions for which they have delegated authority

Snapshot - Licenses and Certifications (Summary) Tile

Use the Licenses and Certifications (Summary) tile (HC_HCTS_LICENSE1_FL) to view the number of current, expiring, or missing licenses and certifications held by the employee.

Navigation:

- (Manager and Administrator) Select the #unique_907 category item from the Snapshot pages.
- (Employee) Select the PeopleSoft eProfile: Career Snapshot - Summary Dashboard from the Career Snapshot pages.

This example illustrates the Licenses and Certifications (Summary) tile.

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The Licenses and Certifications (Summary) tile displays a quick view of the number of licenses and certifications held by the employee that are current, expiring soon, or have expired. The tile also displays a **Total** number. This is an accumulation of the employee's licenses and certification, regardless if they are required by the job profile or not.

To configure when the system should begin showing a licenses or certification as expiring soon, use the #unique_908. When the administrator has configured the system to compare an employee's licenses and certifications with his or her job, the tile will display the **Expired/ Missing** total count. When the compare with job option is turned off, the tile will display the **Expired** total count only and not identify missing items.

If the user does not have access to the employee's person profile, a message will display indicating that.

Select the tile to access the #unique_909 to see a list of licenses and certifications held by the employee.

Manage Delegation - Learn More about Delegation Page

Use the Manage Delegation - Learn More about Delegation page (HCDL_DLG_INSTR) to view help for delegation.

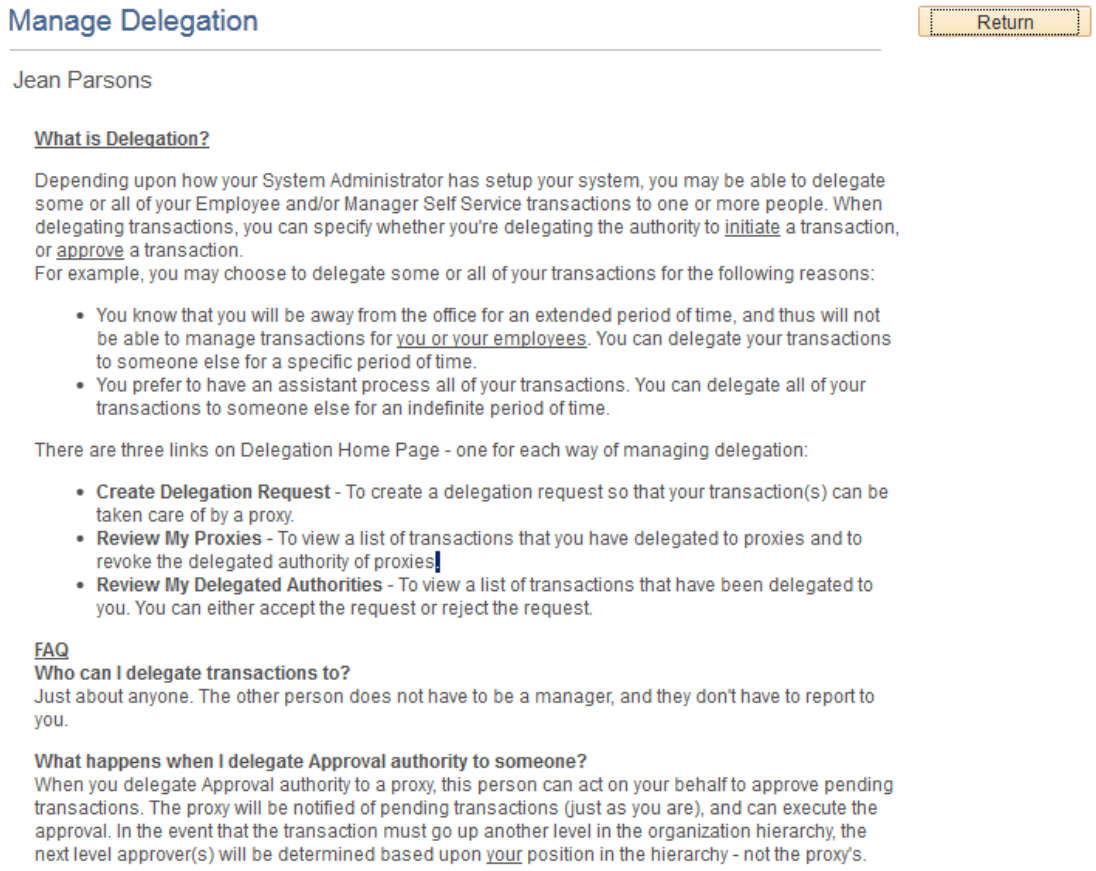
Users can view an instructive description of delegation functionality.

Navigation:

Click the **Learn More about Delegation** link on the Manage Delegation page.

This example illustrates the fields and controls on the Manage Delegation - Learn More about Delegation page. You can find definitions for the fields and controls later on this page.

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You can configure this page by accessing it through PeopleTools Application Designer.

Create Delegation Request - Select Job Title Page

Use the Create Delegation Request - Select Job Title page (HCDL_JOB_SELECTION) to select the job for a delegation request.

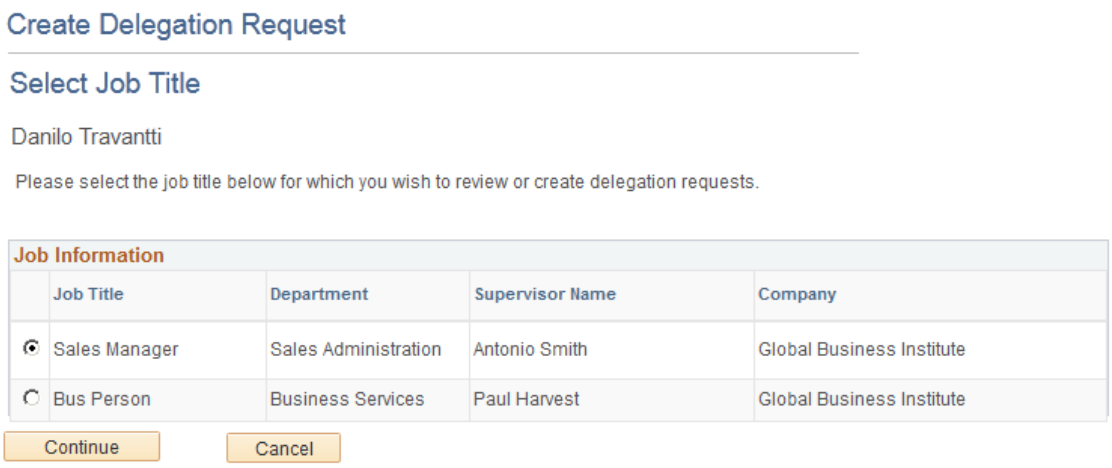
Users with multiple jobs can select the job for which they want to create the delegation request or review their proxies.

Navigation:

Click the **Create Delegation Request** link or the **Review My Proxies** link on the Manage Delegation page when you hold multiple jobs.

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

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If users creating the delegation request or reviewing their proxies have multiple jobs, the system prompts the user to select the job for which they want to create the delegation request or review proxies. This page displays only when the employee has multiple jobs.

Create Delegation Request - Enter Dates Page

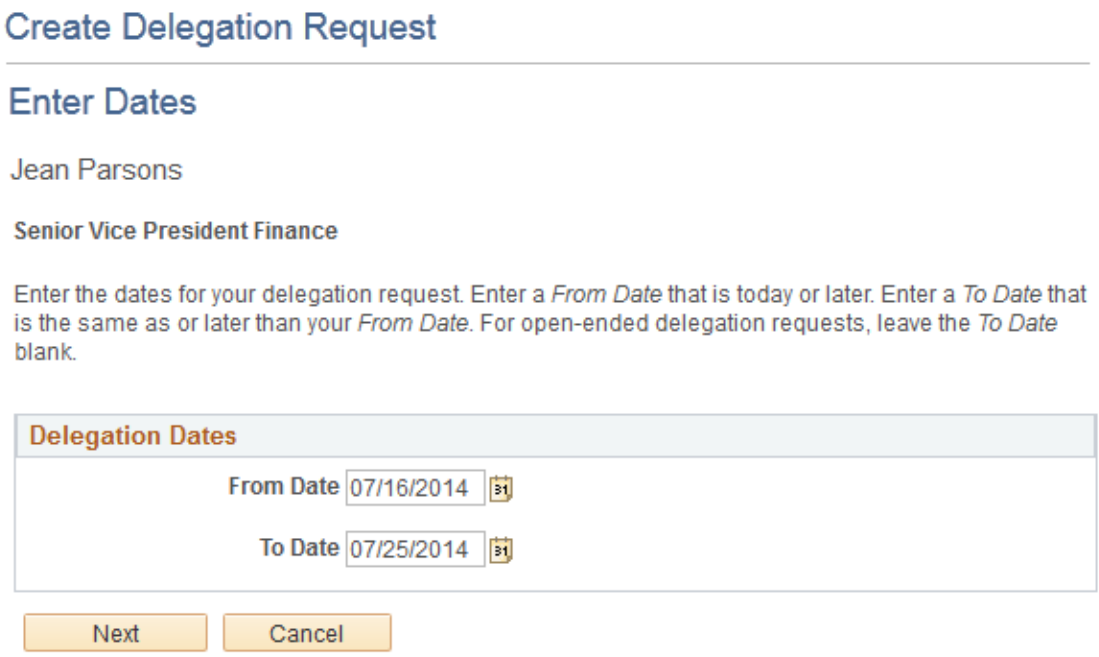
Use the Create Delegation Request - Enter Dates page (HCDL_ADD_DLG_DATES) to enter delegation dates by specifying the **From Date** and **To Date**, which defines the delegation authority period for a transaction.

By not specifying a **To Date**, users specify an open-ended delegation.

Navigation:

Click the **Create Delegation Request** link on the Manage Delegation page.

This example illustrates the fields and controls on the Create Delegation Request - Enter Dates page. You can find definitions for the fields and controls later on this page.



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Create Delegation Request - Select Transactions Page

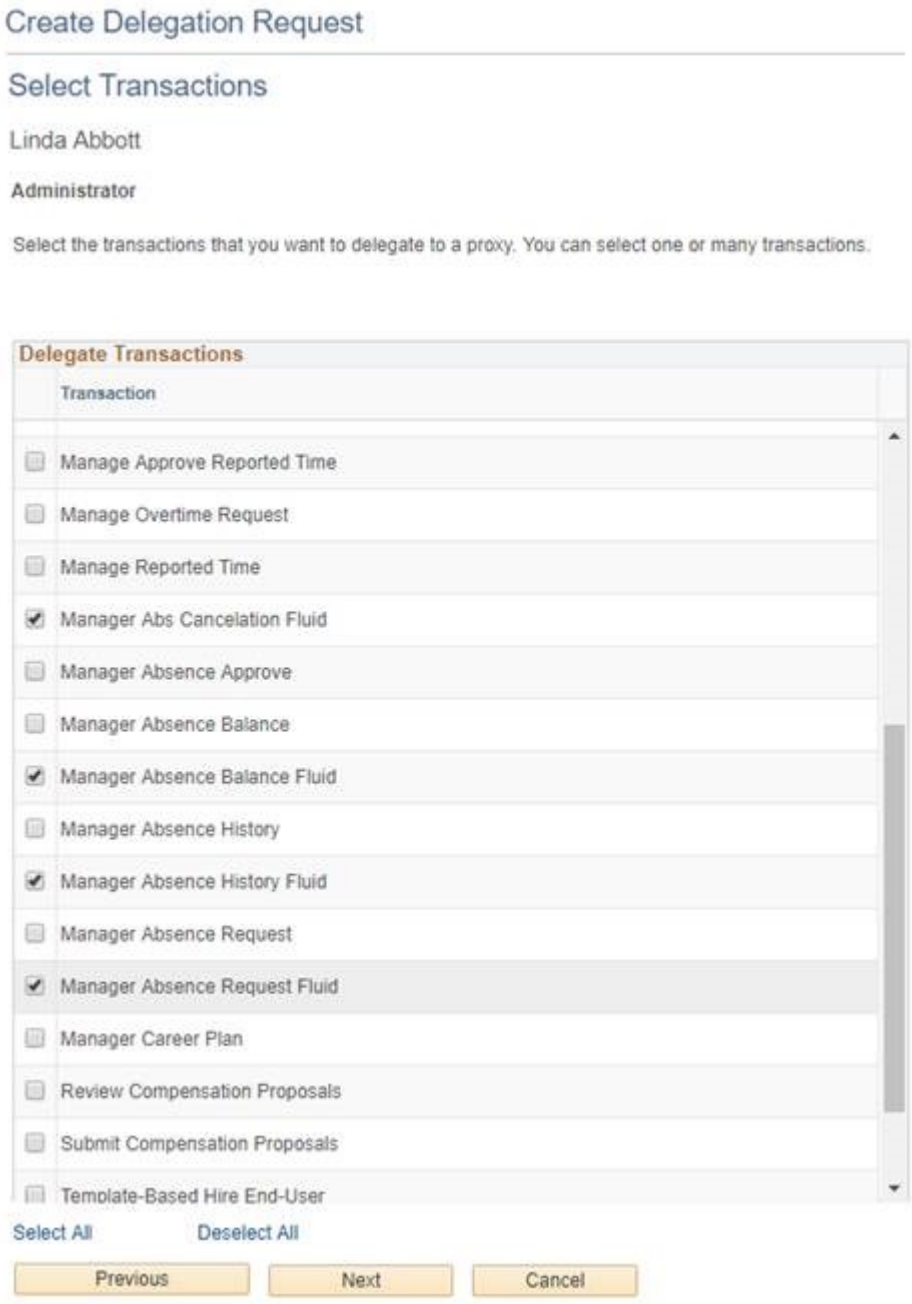
Use the Create Delegation Request - Select Transactions page (HCDL_ADD_DLG_TXNS) to select transactions for delegation.

Users can select one or more transactions to delegate.

Navigation:

Click the **Next** button on the Enter Dates page.

This example illustrates the fields and controls on the Create Delegation Request - Select Transactions page. You can find definitions for the fields and controls later on this page.



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The system displays only the transactions that are configured for delegation initiation or approval on the Configure Delegation Transactions page and for which the delegator has component access.

Users can delegate one or multiple transactions to another person in a single delegation request. When a proxy receives a delegation request for multiple transactions, he or she must accept or reject the entire request. The delegator, however, can revoke single transactions from a multiple transaction request. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Framework. The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays an individual rather than multiple delegation request. This functionality preserves the accuracy of the multiple transaction status.

Create Delegation Request - Select Proxy by Hierarchy Page

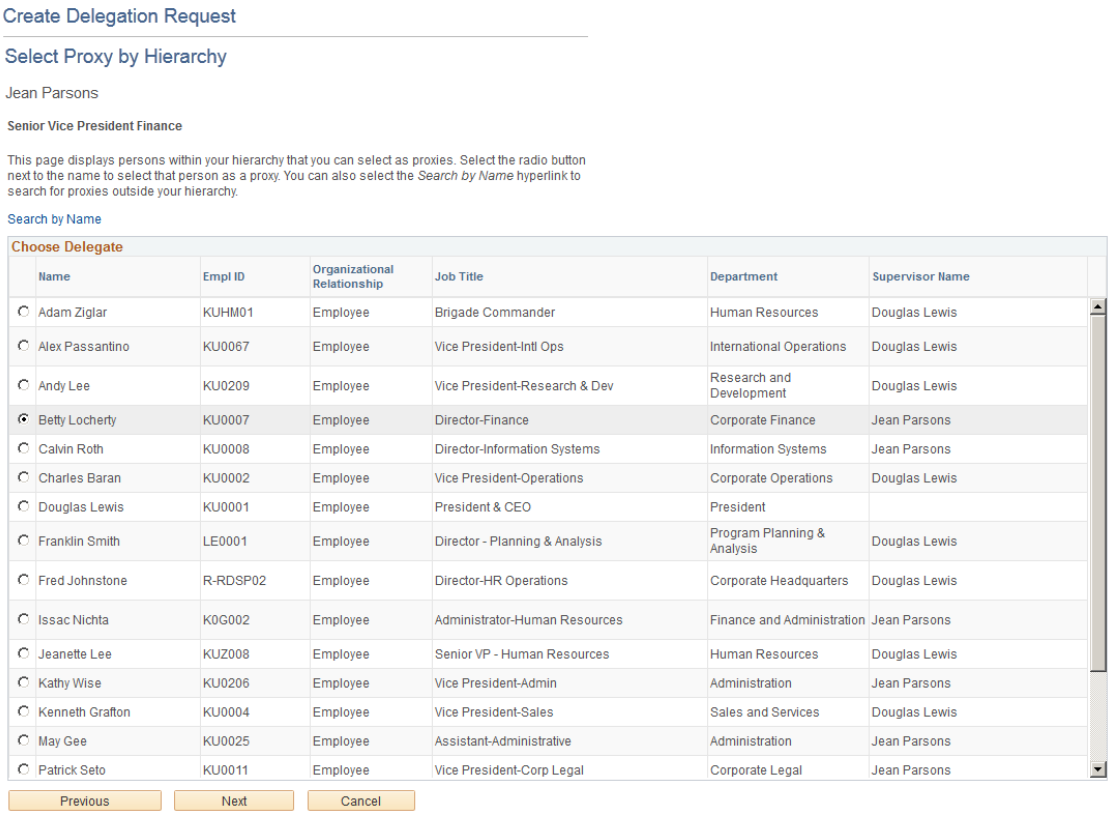
Use the Create Delegation Request - Select Proxy by Hierarchy page (HCDL_ADD_DLG_SRCH) to select a proxy by reporting hierarchy.

Users can select a proxy for the transactions being delegated based on their reporting hierarchy.

Navigation:

Click the **Next** button on the Select Transactions page.

This example illustrates the fields and controls on the Create Delegation Request - Select Proxy by Hierarchy page. You can find definitions for the fields and controls later on this page.



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Users can select a proxy for transactions they are delegating. If the delegation administrator selects a specific hierarchy for the transaction on the Delegation Installation Settings page, the system displays valid proxies based on that selection, and users can select from this list. Valid proxies include persons who report directly or indirectly to the delegator, as well as all persons in the upward hierarchy—starting with the delegator's manager. If the delegation administrator selects the **All Persons** check box on the installation page, then the system displays the **Search by Name** link so that users can search for and select from any person in the system.

Create Delegation Request - Select Proxy By Name Page

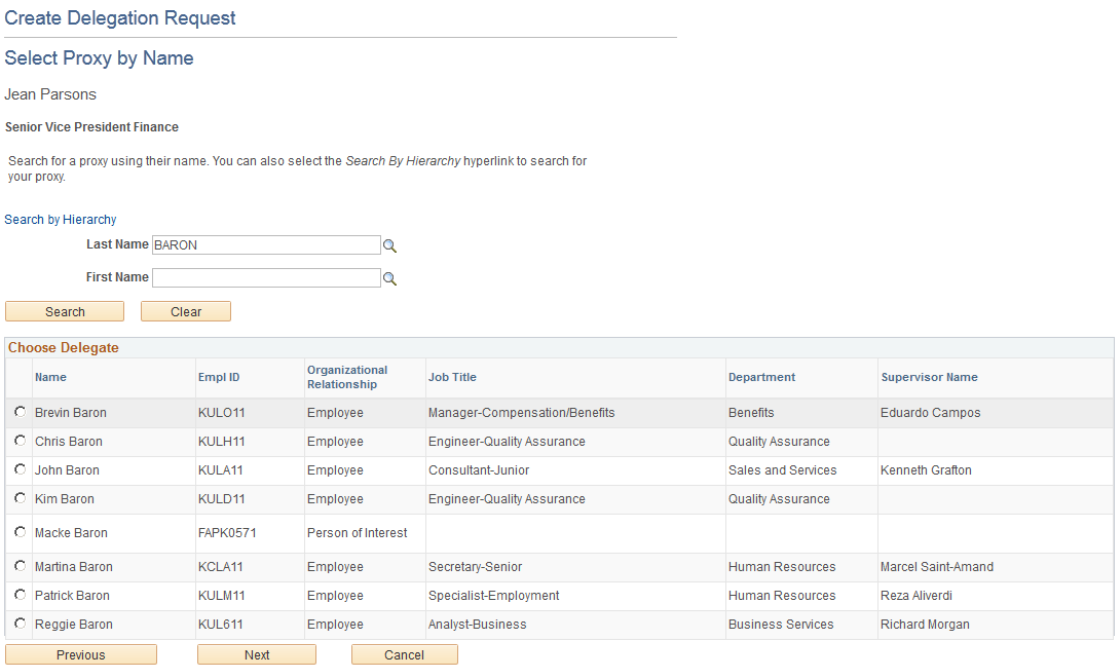
Use the Create Delegation Request - Select Proxy by Name page (HCDL_ADD_DLG_SRCH) to select a proxy by name.

Users can search for and select a proxy for the transactions being delegated based on name.

Navigation:

- Click the **Search by Name** link on the Select Proxy by Hierarchy page.
- Click the **Search by Hierarchy** link on the Select Proxy by Name page.

This example illustrates the fields and controls on the Create Delegation Request - Select Proxy by Name page. You can find definitions for the fields and controls later on this page.



Users can search for a proxy by name and select from the list of valid values in the search results. This page is available only if the delegation administrator selects the **All Persons** check box on the Delegation Installation Settings page.

Create Delegation Request - Delegation Detail Page

Use the Create Delegation Request - Delegation Detail page (HCDL_ADD_DLG_DTL) to submit a delegation request.

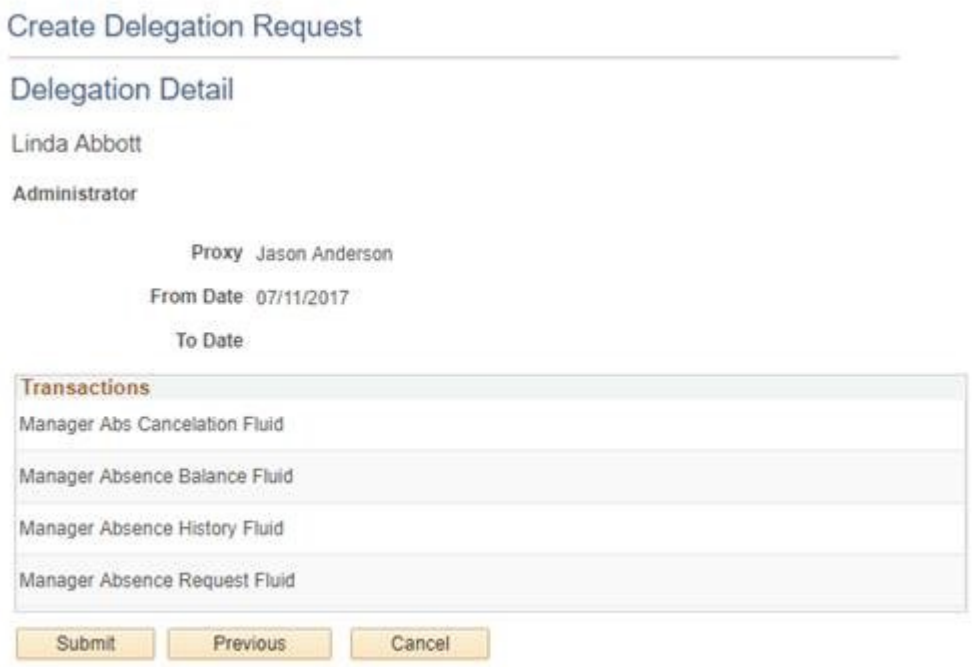
Users can review the details of a delegation request and then submit the delegation request.

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Navigation:

Click the **Next** button on the Select Proxy by Hierarchy page or the Select Proxy by Name page.

This example illustrates the fields and controls on the Create Delegation Request - Delegation Detail page. You can find definitions for the fields and controls later on this page.



The system displays the delegation period, the selected proxy, and the selected transactions. When a transaction is set up with product specific delegation requirements on the Configure Delegation Transaction page, a link will appear after the transaction. When no information is entered in the **Optional Parameters** section of the Configure Delegation Transaction page, the link is not available. Select the product specific link for a transaction to have the system open the product specific component to continue the delegation request.

When users click the **Submit** button, the system automatically sends an email notification to the proxy to either accept or reject the delegation request if Approval Framework is set up.

To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

> **Note**
>
> When a user adds a delegation request, the system checks for an **Alternate User ID** field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

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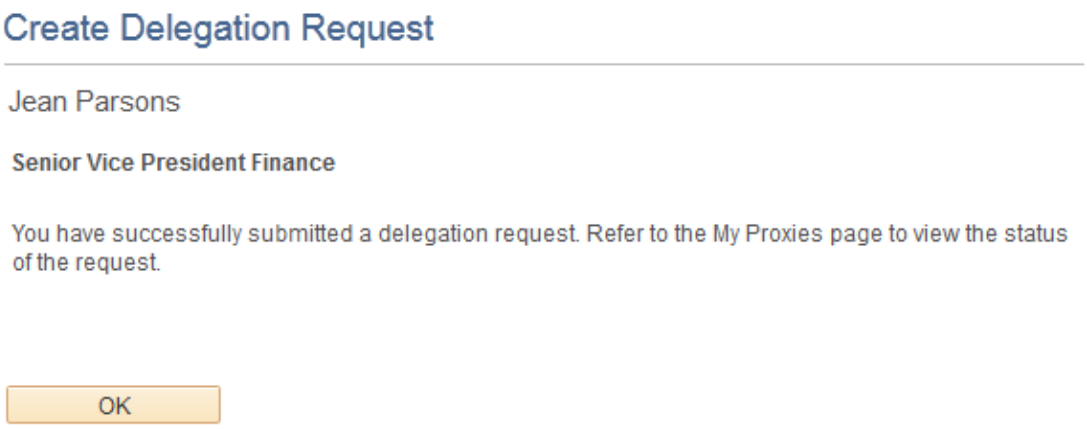
Create Delegation Request - Confirmation Page

Use the Create Delegation Request - Confirmation page (HCDL_DLG_CONFIRM) to view the confirmation of the delegation request submission.

Navigation:

Click the **Submit** button on the Delegation Detail page when adding a delegation request.

This example illustrates the fields and controls on the Create Delegation Request - Confirmation page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

My Proxies Page

Use the My Proxies page (HCDL_MGR_DLGT) to manage proxies for delegation.

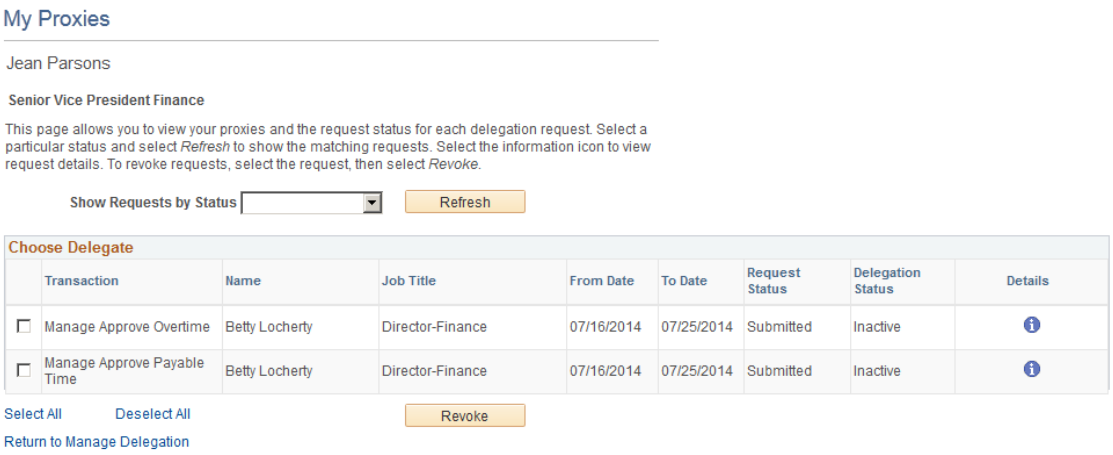
Users can manage their proxies by search for and updating the status of their delegation requests.

Navigation:

Click the **Review My Proxies** link on the Manage Delegation page.

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

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Users can change their mind by revoking delegation requests for which they have delegated transaction initiation or approval to a proxy. To revoke the delegation request, users must select the check box for the delegation request and then click the **Revoke** button. The system changes the request status to *Revoked* and automatically sends an email notification to the proxy about the status of the delegation request.

Delegation Request Details Page

Use the Delegation Request Details page (HCDL_REQUEST_DTL) to view delegation Request Details.

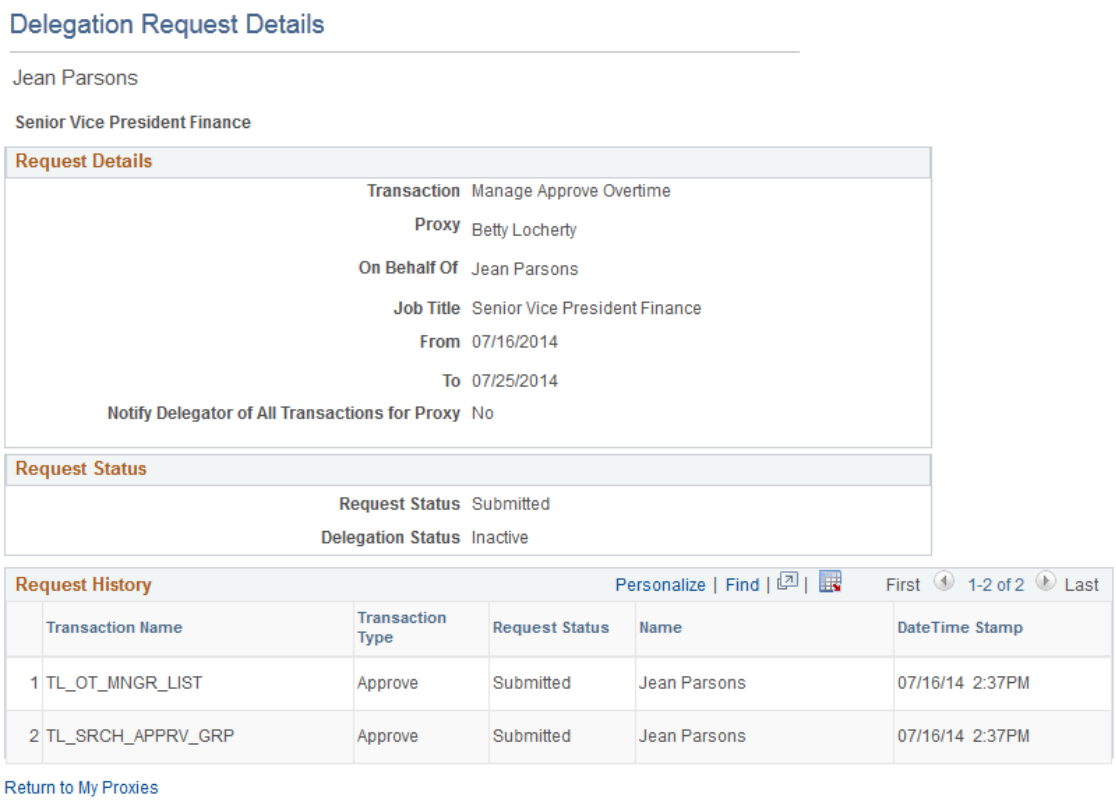
Users can review the details of a submitted delegation request.

Navigation:

Click the **Details** button for the delegation transaction on the My Proxies page.

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

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Users can click the **Return** button to return to the My Proxies page.

My Delegated Authorities Page

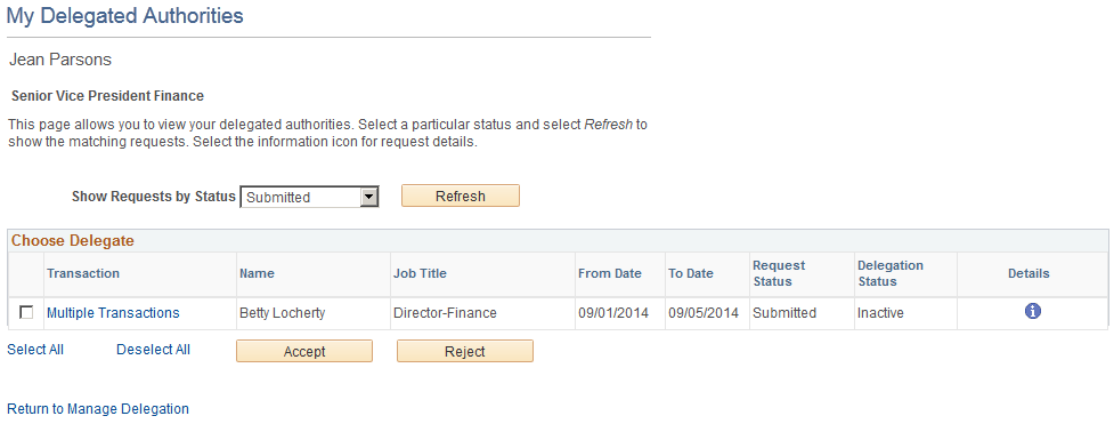
Use the My Delegated Authorities page (HCDL_MGR_DLGT) to manage delegated authorities.

Users can accept or reject the delegation requests for which they have been selected to serve as proxy.

Navigation:

Click the **Review My Delegated Authorities** link on the Manage Delegation page.

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



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> **Note**
>
> In some cases, there may be manager self-service pages that you do not typically have permission to access. In these cases, after accepting a delegation request, log off the system and back in to access the manager self-service pages.

A proxy can hold more than one delegated authority from different delegators. The proxy must select the check box for delegation request and then click either the **Accept** button or the **Reject** button. The system automatically sends an email notification to the delegator about the status of the delegation request.

> **Note**
>
> When you are delegating to a proxy who has multiple job records (as defined in the Job Data component), the system uses the proxy's job record number 0 by default.

Multiple Transactions

Delegators can delegate one or multiple transactions to another person in a single delegation request on the Create Delegation Request - Select Transactions page. If the delegation request contains multiple transactions, the proxy can click the **Multiple Transactions** link to access the Multiple Transactions page and view details about each transaction in the delegation request. For a delegation request with multiple transactions, the proxy must accept or reject the entire request.

The delegator can revoke single transactions from a multiple transaction request on the My Proxies page. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Framework. The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays the delegation request as an individual transaction rather than a multiple transaction. This functionality preserves the accuracy of the multiple transaction status.

Accept Delegation Request Page

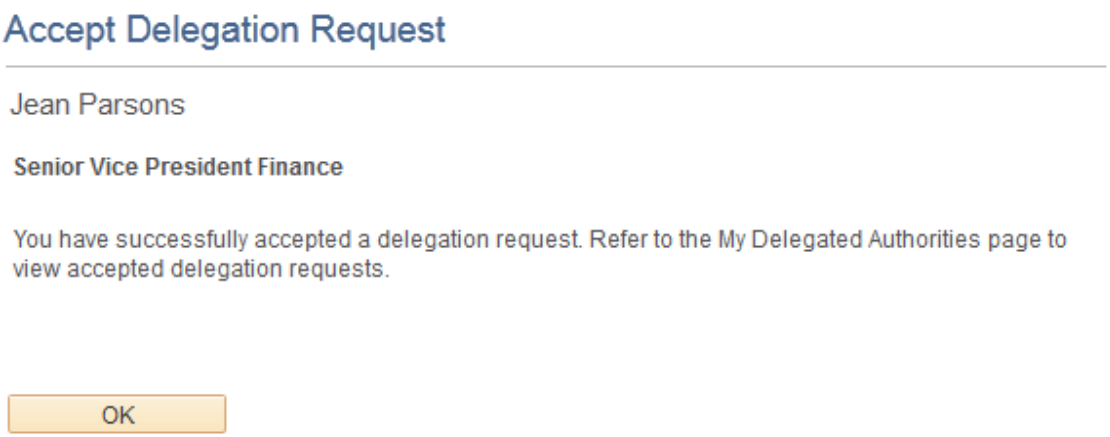
Use the Accept Delegation Request page (HCDL_DLG_CONFIRM) to view the acceptance of a delegation request.

Navigation:

Click the **Accept** button on the My Delegated Authorities page.

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

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Users can click the **OK** button to return to the My Delegated Authorities page.

> **Note**
>
> In some cases, there may be manager self-service pages that you do not typically have permission to access. In these cases, after accepting a delegation request, log off the system and back in to access the manager self-service pages.

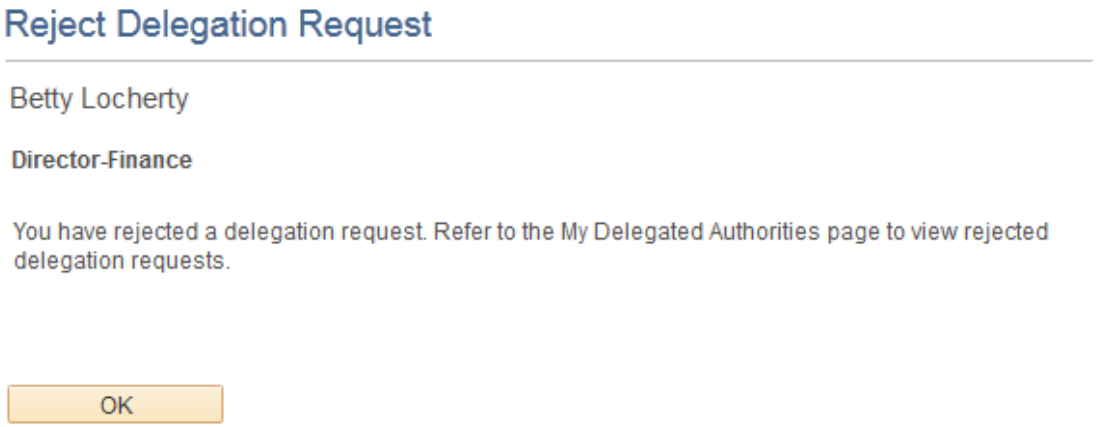
Reject Delegation Request Page

Use the Reject Delegation Request page (HCDL_DLG_CONFIRM) to view the rejection of a delegation request.

Navigation:

Click the **Reject** button on the My Delegated Authorities page.

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



Users can click the **OK** button to return to the My Delegated Authorities page.

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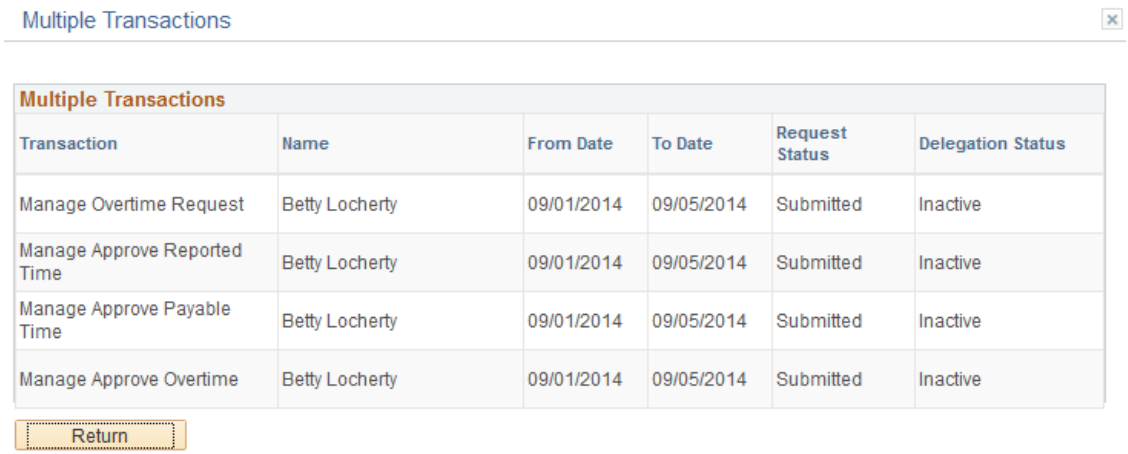
Multiple Transactions Page

Use the Multiple Transactions page (HCDL_MULTI_TXNS) to view details of the multiple transactions for which they have delegated authority.

Navigation:

Click the **Multiple Transactions** link on the My Delegated Authorities page.

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


Multiple Transactions

Multiple Transactions

Transaction	Name	From Date	To Date	Request Status	Delegation Status
Manage Overtime Request	Betty Locherty	09/01/2014	09/05/2014	Submitted	Inactive
Manage Approve Reported Time	Betty Locherty	09/01/2014	09/05/2014	Submitted	Inactive
Manage Approve Payable Time	Betty Locherty	09/01/2014	09/05/2014	Submitted	Inactive
Manage Approve Overtime	Betty Locherty	09/01/2014	09/05/2014	Submitted	Inactive

Return

The system provides access to this page only if the delegator selected the user to server as proxy for multiple transactions within the same delegation request.

Reviewing Delivered Notification Templates for Delegation

This table lists the delivered delegation notifications, describes each notification, describes the trigger for each notification, and lists the recipients:

> **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 Enterprise Components: Understanding Notification Composer.

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Template Name	Notification Description	Trigger	Recipients
DelegationAccept	States that the proxy has accepted the delegation request submitted by the delegator.	Proxy accepts delegation request.	To: Delegator CC: Proxy
DelegationAdminAdd	States that the administrator, on behalf of delegator, has submitted a delegation request to the proxy.	Delegation administrator adds and submits delegation request.	To: Proxy CC: Delegator
DelegationAdminRevoke	States that the administrator, on behalf of delegator, has revoked a delegation request that was assigned to the proxy.	Delegation administrator revokes delegation request.	To: Proxy CC: Delegator
DelegationBatch	States that delegation authority has been made active or inactive for the delegator and transactions listed. Also states that security has been updated to allow the proxy access to the transactions.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Proxy CC: Delegator
DelegationError	States that a submitted delegation request has encountered an error.	Delegator submits a delegation request but an error occurs.	To: Delegator
DelegationNotifyAdmin	States that the system has identified that a proxy is inactive for at least one day for a delegation request that has been accepted.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Delegator CC: Delegation Administrator
DelegationReject	States that a proxy has rejected a delegation request submitted by a delegator.	Proxy rejects delegation request.	To: Delegator CC: Proxy
DelegationRequest	States that a delegator or an administrator on behalf of the delegator has submitted a delegation request to the proxy.	Delegator creates and submits a delegation request.	To: Proxy CC: Delegator

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Template Name	Notification Description	Trigger	Recipients
DelegationRevoke	States that a delegator or an administrator on behalf of the delegator has revoked a delegation request that was assigned to the proxy.	Delegator revokes a delegation request.	To: Proxy CC: Delegator

Related Topics

- Defining Notification Templates for Approvals
  To set up notification templates for approvals, use the Generic Templates (WL_TEMPLATE_GEN) component.

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Working with Metadata and Query Builder

Managing the HCM Metadata Repository

To manage the HCM metadata repository, use the Base Class Definition (HCMD_BASE_CATALOG), Object Class Definition (HCMD_OBJ_CATALOG), Export (HCMD_EXPORT_OBJS), and Import (HCMD_IMPORT_OBJS) components.

These topics provide an overview of and discuss managing the HCM metadata repository.

> **Important**
>
> HCM metadata repository is no longer supported.

Pages Used to Manage the HCM Metadata Repository

Page Name	Definition Name	Usage
Base Class Definition Page	HCMD_BASE_PG	Define base classes by setting up and reviewing definitions for base classes.
Object Class Definition Page	HCMD_OBJS_PG	Define object classes by setting up and reviewing definitions for derived classes.
Class Attribute Details Page	HCMD_OATT_SPG	Enter or review class attribute details.
Class Relationship Details Page	HCMD_OREL_SPG	Enter or review class relationship details.
Export Metadata Definitions Page	HCMD_EXPORT_OBJS	Export metadata definitions from the catalog to XML.
Export Metadata Definitions - Export Metadata Definitions Page	HCMD_FILENAME	Enter the path and filename of the export file to be created.
Import Metadata Definitions Page	HCMD_IMPORT_OBJS	Import metadata definitions.

Understanding the HCM Metadata Repository

Metadata is data about the data in your system. It defines every object, object attribute, and relationship between objects. Metadata enables you to define and manipulate the records in your PeopleSoft HCM database as objects.

The HCM metadata object model consists of the following two elements:

- PeopleTools-level metadata

  Provides information about fields, field labels, and database records and views.

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- HCM-level metadata

  Establishes relationships between objects at the object level, defines object's services, and alternative labels.

HCM metadata object definitions are registered in the metadata repository as classes and these classes are grouped in the following two catalogs according to general behavior, processing, and attribute needs:

- Base catalog.

  Object classes:

  – Define the general behavior and attributes for a class.
  – Group objects for better processing and querying.
  – Provide a single layer of inheritance for derived classes.

- Object catalog.

  Object classes:

  – Can be the child object of a parent base class, inheriting all of the attributes of the base class.

> **Note**
>
> Object class catalogs do not need to have a parent class object.

> **Note**
>
> Any metadata class definitions that are not obviously a parent class object, should be defined in the object catalog.

  – Are defined with unique attributes in addition to any inherited attributes.

For example, the base class object, Person Base, is the parent to the derived object class, Person.

Common Elements Used to Manage the HCM Metadata Repository

Field or Control	Description
Basic Information	Define the class's basic characteristics by entering information into the following fields: • **Class Name** • **Display Label** • **Object Owner ID** • **Active Flag**

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Field or Control	Description
Class Use	Define how the class object is used by: • Selecting one of the following options: – *Production*: a standard production object. – *Staging*: a specialized staging object used to load data into the HCM system. – *Reporting*: a specialized reporting object. – *System*: an HCM system object not usually visible to users. – *Configuration*: a specialized object used in HCM system configuration. – *Source View* (object class only) – *Attribute Map* (object class only) – *Key Map* (object class only) – *Temporary* (object class only) • Selecting **Use in UI?** to display the class in a dynamic user interface. • Selecting **Use in Queries?** to display the class in Query Builder. The system selects the **System Data** check box if the class object is delivered as HCM system data.
Persistence Mapping	Enter the name of the PeopleTools record to which this class maps. The PeopleTools record is the sole source for the class object. Each class definition maps to one PeopleTools record
Class Attributes (Record Field)	Review or enter the class attributes. Click the View Attribute Details button to review details or enter a details for a new class attribute on the Class Attribute Details page.
Import Record Fields	Click to populate the **Class Attributes** grid with all the fields associated with the PeopleTools record you selected in the persistence mapping **Record Name** field. The button does not overwrite valid fields. **Note:** PeopleSoft recommends that you keep the attributes in sync with the PeopleTools record fields by using this button after you make a modification to the PeopleTools record.

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Field or Control	Description
Relationships	Define the relationships this class definition has with other class definitions. For example the Person class that maps to the PeopleTools Person record could be have relationships with the: • Name class. People in the system could have one or more names. • Address class. People in the system could have one or more address. • Job class. People in the system could have zero or more jobs. Click the **View Relationship Details** button to review details or enter a details for a new class attribute on the Class Relationship Details page.
Class Extensions	Class extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class extension called MyJava and with a value of the Java file name that programmers can access as required. Define the class extensions by entering values into the following fields: • **Type** • **Name** • **Value**

Base Class Definition Page

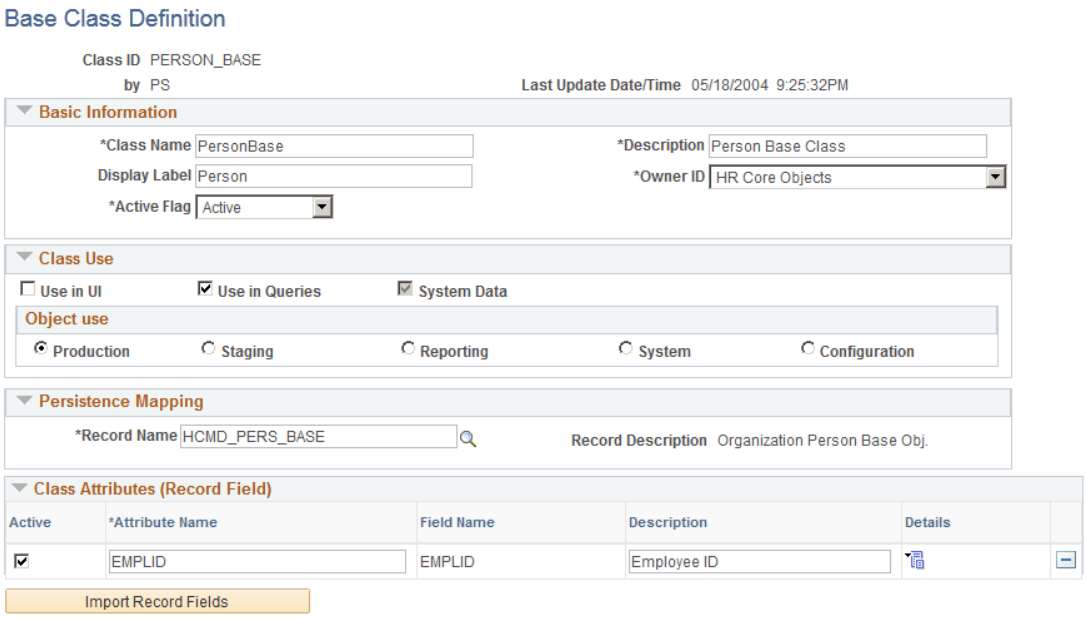
Use the Base Class Definition page (HCMD_BASE_PG) to define base classes by setting up and reviewing definitions for base classes.

Navigation:

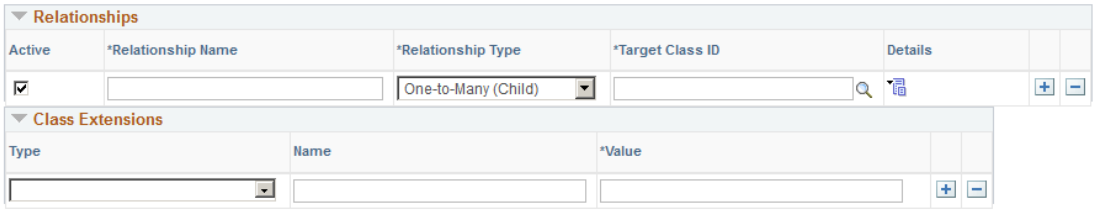
Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Metadata Repository**, and then **Base Class Definition**, and then **Base Class Definition**

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

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



Object Class Definition Page

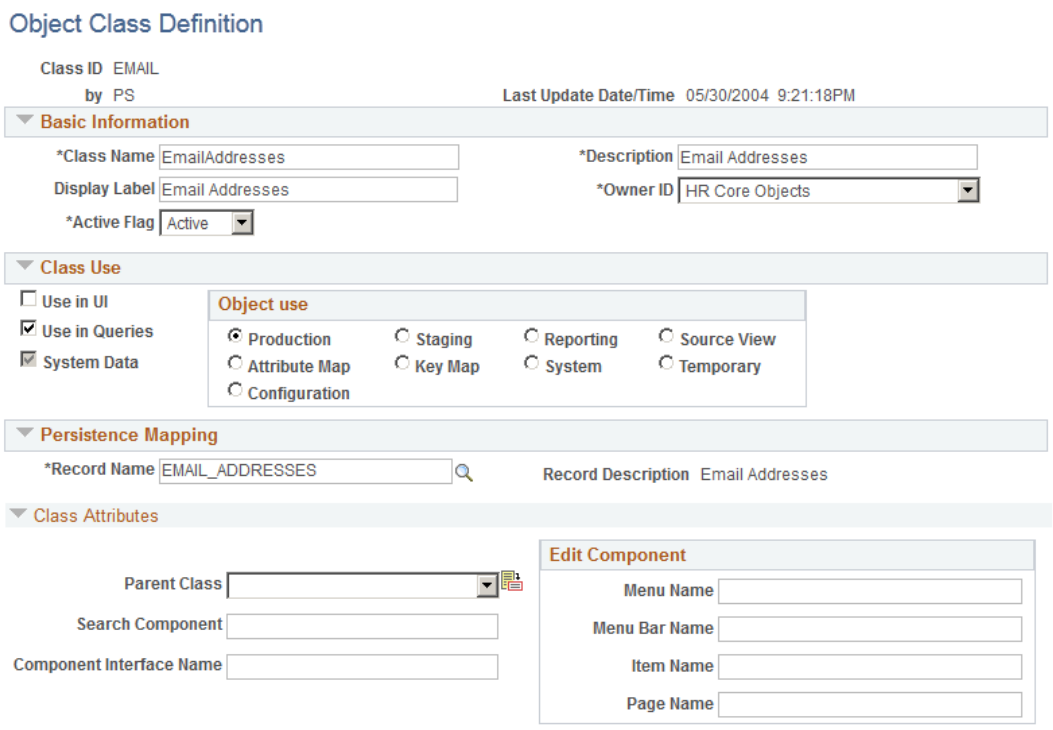
Use the Object Class Definition page (HCMD_OBJS_PG) to define object classes by setting up and reviewing definitions for derived classes.

Navigation:

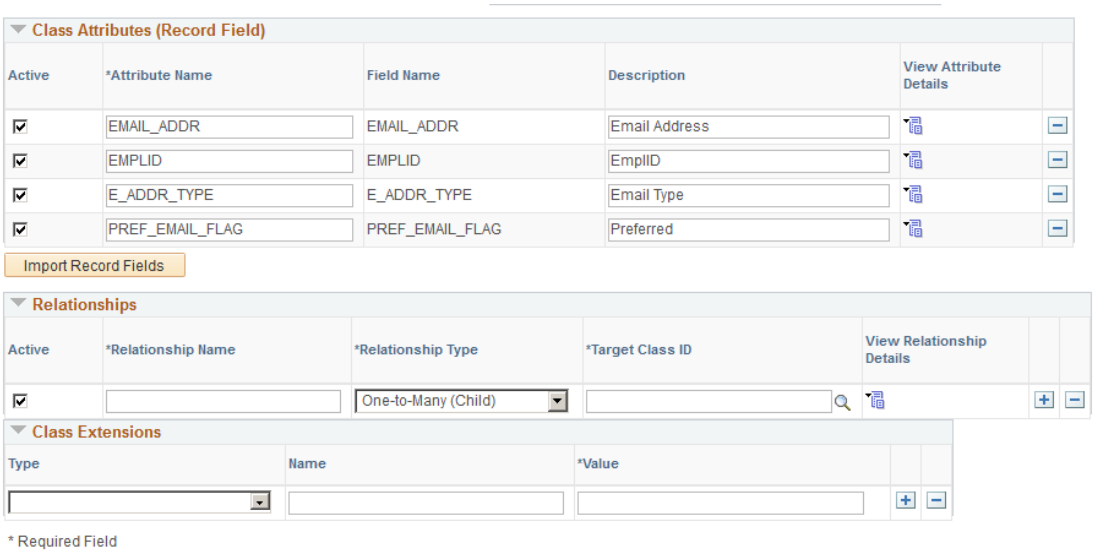
Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Metadata Repository**, and then **Object Class Definition**, and then **Object Class Definition**

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

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



Class Attributes

Field or Control	Description
Parent Class	If this class object is built upon a parent class object, select it here. The class object will inherit all of the parent's attributes. Leave this field blank if the object class has no parent.

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Field or Control	Description
Search Component	Select the search component to search for instances for this derived class object. The system uses the Query Builder search component as a default if you do not enter a value here.
Component Interface Name	Select the PeopleTools component interface used to save data for the class. You can use the component interface in Query Builder to perform bulk updates. For example, you can create a query for all the people at Location A and then update the location information on the Job Data component for that group of people to Location B.

Edit Component

When you enter a component in this group box for a class, the system enables you to link to the component or page from a hyperlink in the query results when you query the class in Query Builder. This enables you to make updates to the component while you are reviewing the query results

Enter the component's **Menu Name, Menu Bar Name, Item Name,** and **Page Name.**

Class Attribute Details Page

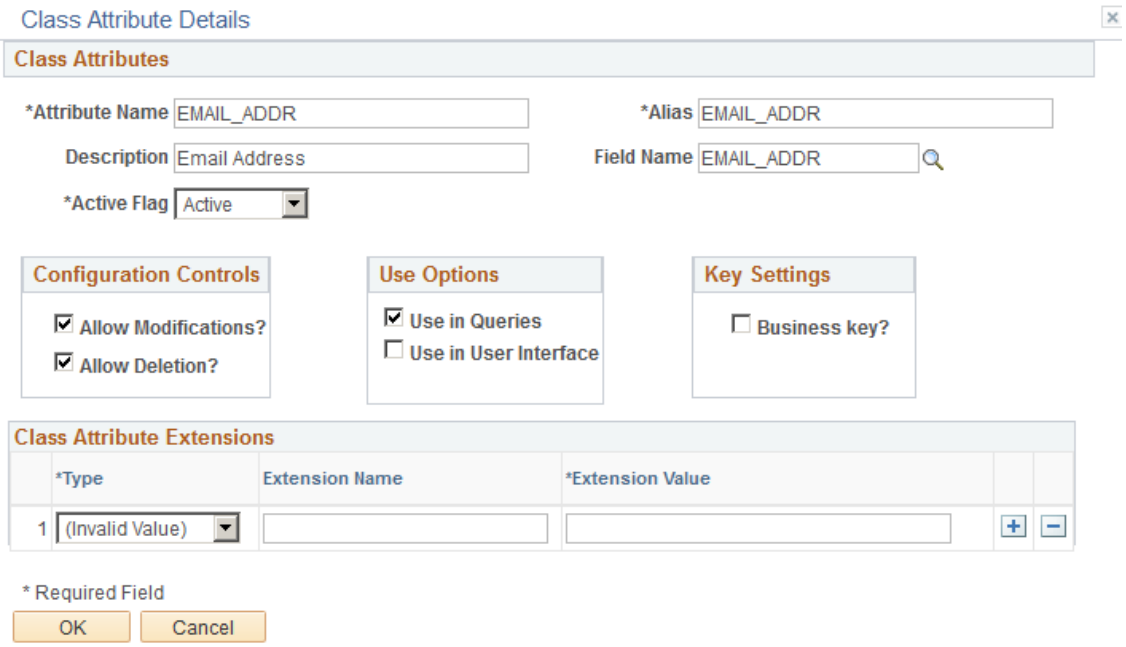
Use the Class Attribute Details page (HCMD_OATT_SPG) to enter or review class attribute details.

Navigation:

- Click the **View Attribute Details** icon for a class attribute on the Base Class Definition page.
- Click the **View Attribute Details** icon for a class attribute on the Object Class Definition page.

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

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Field or Control	Description
Attribute Name	Enter the attribute name. It can be different from the corresponding field.
Alias	Enter an alias for the attribute.
Field Name	Each attribute must have a corresponding field in the PeopleTools record.

Configuration Controls

Field or Control	Description
Allow Modifications?	Select if the users can modify the attribute in dynamic user interfaces.
Allow Deletion?	Select if the users can delete the attribute in dynamic user interfaces.

Use Options

Field or Control	Description
Use in Queries	Select to display the class in Query Builder.
Use in User Interface	Select to display the attribute in a dynamic user interface.

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Key Settings

Field or Control	Description
Business key?	Select if the business logic indicates that this attribute (field) is a key. You do not need to define the attribute as a key field at the record level.

Class Attribute Extensions

Class attribute extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class attribute extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- **Type**
- **Extension Name**
- **Extension Value**

Class Relationship Details Page

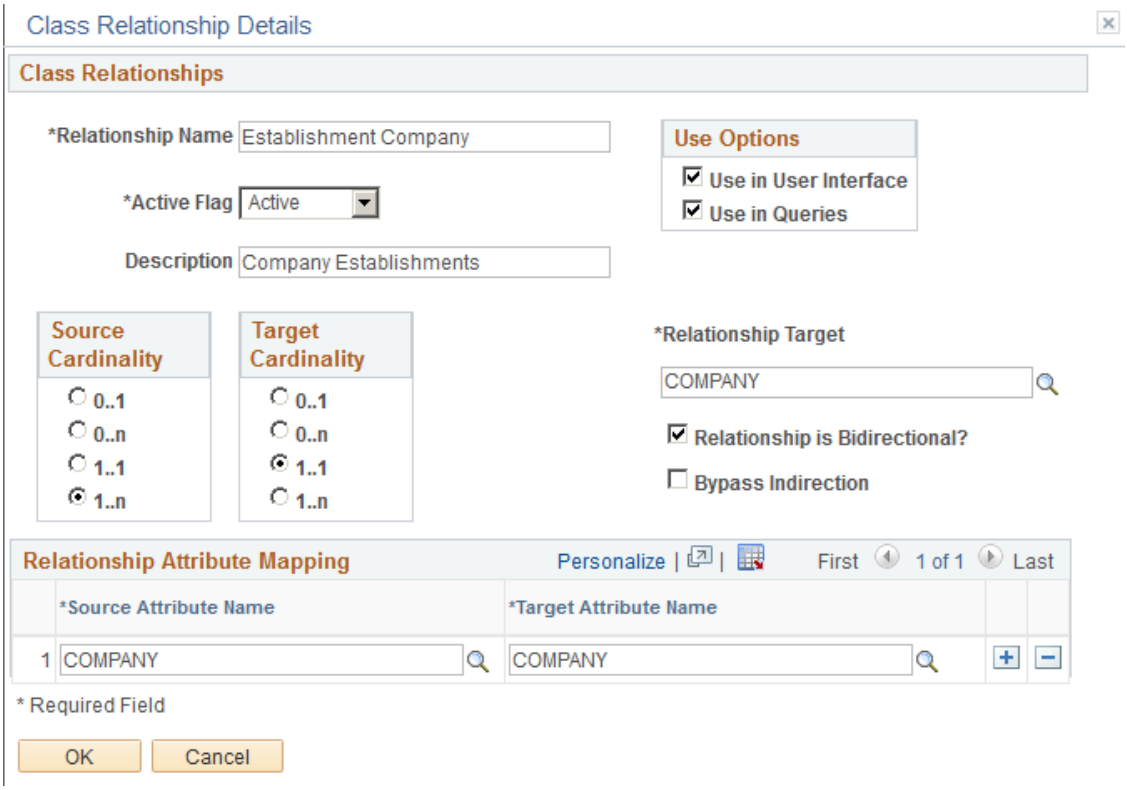
Use the Class Relationship Details page (HCMD_OREL_SPG) to enter or review class relationship details.

Navigation:

- Click the **View Relationship Details** icon for a relationship on the Base Class Definition page.
- Click the **View Relationship Details** icon for a relationship on the Object Class Definition page.

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

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Field or Control	Description
Relationship Name	Enter the name of the relationship.
Use in User Interface	Select to display the relationship in a dynamic user interface.
Use in Queries	Select to display the relationship in Query Builder.
Source Cardinality	Select the cardinality setting of the source class object from the following options: • zero to 1 *(0.. 1)* • zero to many *(0.. n)* • one to one *(1.. 1)* • one to many *(1.. n)*
Target Cardinality	Select the cardinality setting of the target class object from the following options: • zero to 1 *(0.. 1)* • zero to many *(0.. n)* • one to one *(1.. 1)* • one to many *(1.. n)*
Relationship Target	Select the relationship's target class object.
Relationship is Bidirectional?	Select to make the reverse relationship (with the source and target object classes reversed) automatically available.

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Field or Control	Description
Bypass Indirection	Select to bypass automatic setID indirection for those relationships that include setID indirection fields. Query Build automatically adds the required SetID logic as required. If you select this option, you must define the logic in the relationship attribute mapping. For example, SETID_Location maps directly to the SetID field on the Locations table (LOCATION_TABLE) to improve performance.

Relationship Attribute Mapping

Enter the names of the attributes that you are mapping. You can map any number of attributes and the attributes do not have to have the same name to be mapped.

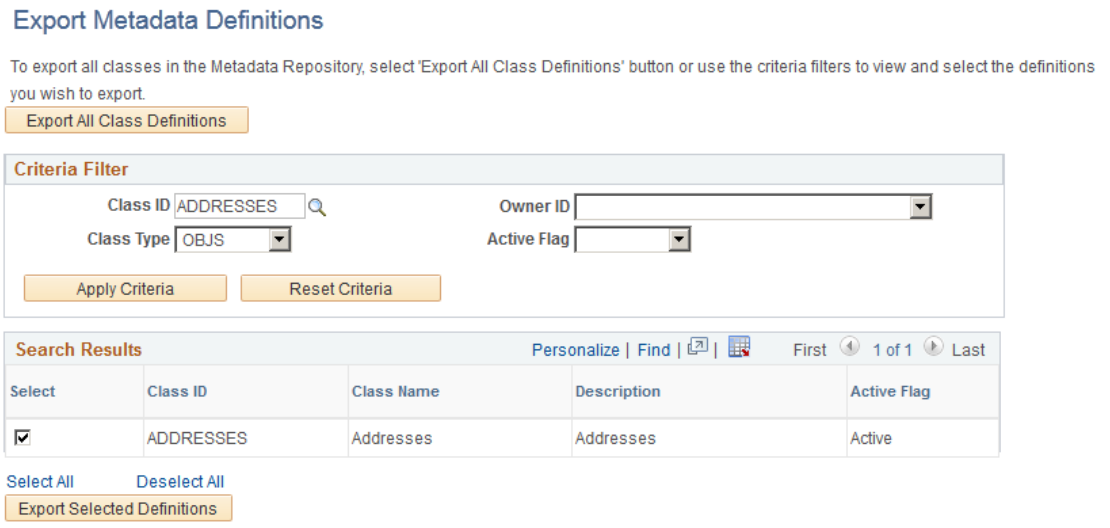
Export Metadata Definitions Page

Use the Export Metadata Definitions page (HCMD_EXPORT_OBJS) to export metadata definitions from the catalog to XML.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Metadata Repository**, and then **Export**, and then **Export Metadata Definitions**

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



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Field or Control	Description
Export All Class Definitions	Click to export all the metadata definitions in the catalog to an XML file. The system will display the Export Metadata Definitions page where you enter the export path and file name to be created.

Criteria Filter

To limit the classes, enter filter criteria in the **Class ID, Class Type, Object Owner ID,** or **Active Flag** fields.

> **Note**
>
> You can select more than one class ID in this field by separating the values with commas.

Field or Control	Description
Apply Criteria	Click to apply the criteria you entered. The system populates the Search Results grid with the class objects that meet the criteria.
Reset Criteria	Click to clear the search criteria fields.

Search Results

The system populates this grid with the class objects that meet your search criteria and automatically selects all of them. Deselect the check boxes next to those class objects that you do not want to export.

Field or Control	Description
Export Selected Definitions	Click to export the selected class objects to an XML file.

Export Metadata Definitions - Export Metadata Definitions Page

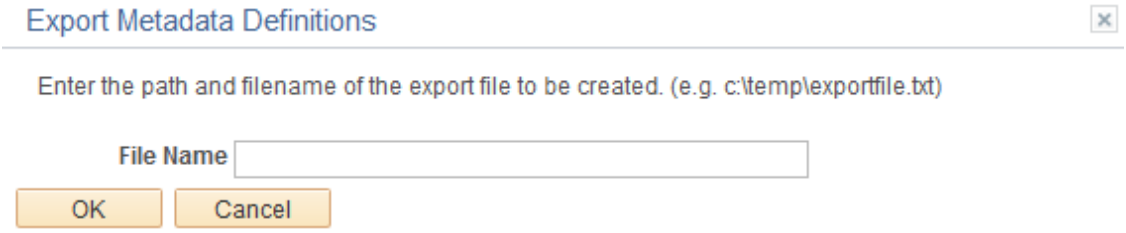
The system displays the Export Metadata Definitions - Export Metadata Definitions page (HCMD_FILENAME) to enter the path and filename of the export file to be created.

Navigation:

Click the **Export All Class Definitions** button or **Export Selected Definitions** button.

This example illustrates the fields and controls on the Export Metadata Definitions - Export Metadata Definitions page. You can find definitions for the fields and controls later on this page

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Enter the full path to the application server and the file name. If you do not specify a file name, the process will create the file in the default directory.

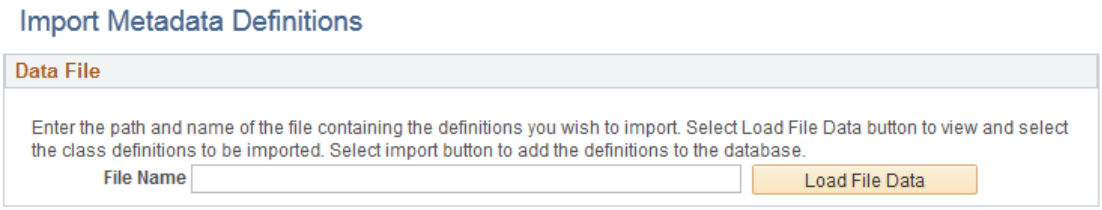
Import Metadata Definitions Page

Use the Import Metadata Definitions page (HCMD_IMPORT_OBJS) to import metadata definitions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Metadata Repository**, and then **Import**, and then **Import Metadata Definitions**

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



Enter the file path and name to load the data from the XML file. The system will display a list of classes that exist in the exported file and an icon indicates if the class already exists. Select which classes should be imported and if the system should overwrite existing class definitions.

Building SQL Queries with Query Builder

To build SQL queries with Query Builder, use the Query Builder component (EQRY_SAMP_HTML_CMP) and the Pre-defined Queries component (EQRY_VIEWER_CMP).

These topics provide an overview of Query Builder and discuss how to build SQL queries with Query Builder.

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Pages Used to Build Queries

Page Name	Definition Name	Usage
Result Attributes Page	EQRY_OUTPUT_PG	Select the object attributes that you want to use as result attributes in the query results. Select as many attributes as needed.
Save Attributes Page	EQRY_OUT_S_PG	Save the result attributes of the query. Enter a name and description for the query. The query is available to all users who have access to Query Builder. If you don't want the query generally available, select **Private Query.**
Load Attributes Page	EQRY_OUT_L_PG	Load or append predefined result attributes selection for use in the current query. The attributes that are available depend on the target object that is selected when Query Builder is invoked.
Query Builder - Criteria Page	EQRY_ISCRIPT	Specify the attributes for which you want to query, and define expressions by using operators and values.
Criteria Attribute Tree Page	EQRY_ATT_TREE_PG	Use the object selection tree, navigate to the attribute that you want to use as query criteria, and select it.
Select Value Page	EQRY_VBUILD_PG	Select the attribute value to use as query criteria.
Save Criteria Page	EQRY_PROP_PG	Save the current criteria selection by name for use in later queries. The system saves the query criteria selection for the target object that is selected when Query Builder is invoked.
Load Criteria Page	EQRY_LOAD_PG	Load an existing criteria selection.
Query Builder - Results Page	EQRY_RESULT_PG	Review the results of your query.
Query Builder - Save/Load Query Page	EQRY_COMBO_SAVE_PG	Save the current query or load a predefined query.
Pre-defined Queries Page	EQRY_VIEWER_PG	Run a query that you've predefined on the Query Builder component. The page looks like the Query Builder - Results page.

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Understanding Query Builder

Query Builder is a flexible tool that is used to query class objects that are defined in the PeopleSoft HCM metadata repository.

Query Builder lets you:

- Create queries of unlimited length and complexity without the need to know the underlying database model.

  Query builder automatically generates the most efficient SQL based on the metadata class definitions, generates all SQL joins automatically based on the relationships defined in metadata, and includes SetID and effective-dated logic.
- Select any number of available output fields to display results from both the underlying class and the class relationships.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.
- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.

  Query Builder automatically generates the appropriate SQL for aggregations.
- Preview the Structured Query Language (SQL) query generated by Query Builder.

Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.
- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

Result Attributes Page

Use the Result Attributes page (EQRY_OUTPUT_PG) to select the object attributes that you want to use as result attributes in the query results.

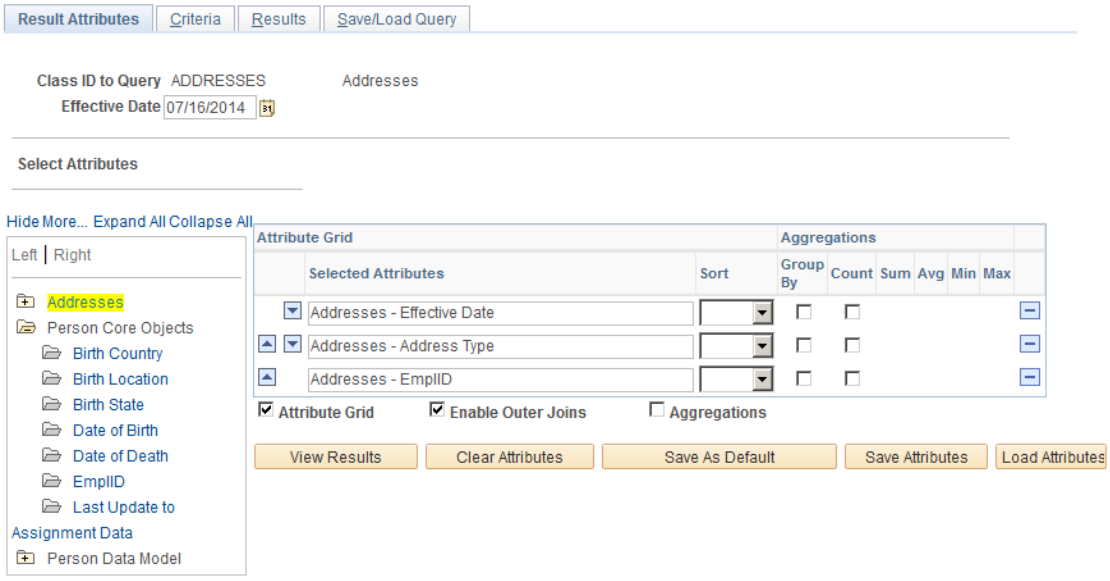
Select as many attributes as needed.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Query Builder**, and then **Query Builder**, and then **Result Attributes**

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

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Use the Result Attributes page to select the object attributes that you want to search against. You can select any combination of the defined attributes for the object.

At any point while defining result attributes, you can run the query and view the results. You can then return to the Result Attributes page to modify the query result attributes, go to the Criteria page to refine the query selection, or save the definitions.

Field or Control	Description
Class ID to Query	Displays the class ID you selected for querying on the search page.

Select Attributes

The system displays folders for the target class ID object and any other objects that have a relationship (as entered on the Object Class Definition page) with the selected class ID. In this example, you can see that both the Person Core Objects and Person Data Model objects have a relationship with the Email Addresses object.

Click the folder to view the attributes of each object. Click an attribute to add it to the attribute grid.

Field or Control	Description
Select Attributes	You can rearrange the order of the selected attributes to determine the order in which they appear on the Results page. You can also determine the sort order of the data that is in each results column.
Hide	Hides the attribute tree.

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Field or Control	Description
More...	When Query Builder first opens, the **Select Attributes** tree displays the system objects that are closely related to the target object through direct association. These relationships are defined in HCM metadata and represent the objects that you most often use in queries. If you can't find the objects that you want, click the **More** link to access other objects .
Expand All	Click to reveal the contents of all attribute tree folders.
Collapse All	Click to collapse all attribute tree folders.
Attribute Grid	Select this check box to display the results columns as defined in the **Attribute Grid.**
Aggregations	Select this check box to display the results based on the groupings that are selected in the **Aggregations** grid.
Enable Outer Joins	Select this check box to enable the query to use outer joins to gather additional data in the query.
View Results	Click to run the query. The system opens the Results page, showing the results of the query.
Clear Attributes	(Optional) Click to remove the attributes that appear in the Selected Attributes list.
Set As Default	(Optional) Click to set the attributes that you select as the default attributes that appear each time that you use the target object.
Save Attributes	(Optional) Click to save current attribute selections as a query.
Load Attributes	(Optional) Click to load predefined attribute selections.

Attribute Grid

Field or Control	Description
Selected Attributes	The system populates the **Selected Attributes** list with the target object's list box items as they're defined in the Tools Record definition. You can add or delete attributes as necessary for your query.
 and 	Use the arrows to rearrange the attributes to determine the column display order in query results. For example, the attribute at the top of the **Selected Attributes** list appears as the left-most column in the query results.

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Field or Control	Description
Sort	(Optional) Indicate a sort order for the attribute in the column results: *Blank*, *Asc* (ascending), and *Desc* (descending). You can sort one or multiple columns. Specifying multiple sorts causes column results to sort from left to right. Column results that are sorted have a link that appears in the column header in the query results.

Aggregations

Use the check boxes in this grid to indicate how you want the results to appear on the Results page. For example, you can tell the system to group the results by order number, and within each group, sum the order amounts as well as show the minimum and maximum amounts.

Field or Control	Description
Group	Select this check box to group the results by the attribute.
Count, **Sum**, **Avg** (average), **Min** (minimum), and **Max** (maximum)	Select these options to have the system count the different groups. For attributes that are related to transaction amounts, the system can also sum, average, and indicate the minimum or maximum amounts.

Load Attributes Page

Use the Load Attributes page (EQRY_OUT_L_PG) to load or append predefined result attributes selection for use in the current query.

The attributes that are available depend on the target object that is selected when Query Builder is invoked.

Navigation:

Click the **Load Attributes** button on the Result Attributes page.

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



Use the Load Attributes page to add saved results columns to the query. The page displays all of the attribute sets that are saved by all users as well as the attribute sets that you save and mark as private.

Field or Control	Description
Load	Replaces the result attributes in the query.

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Field or Control	Description
Append	Adds the result attributes onto the query.
User ID	The user who creates and saves the result attributes.
Private Query	Indicates the private queries.

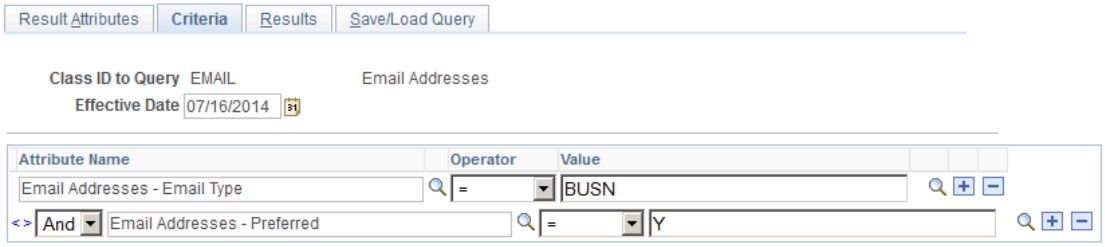
Query Builder - Criteria Page

Use the Query Builder - Criteria page (EQRY_ISCRIPT) to specify the attributes for which you want to query, and define expressions by using operators and values.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Query Builder**, and then **Query Builder**, and then **Criteria**

This example illustrates the fields and controls on the Query Builder - Criteria page. You can find definitions for the fields and controls later on this page.



After you load or define the query result attributes, you can optionally add criteria to filter the query results on the Query Builder - Criteria page. You can only select attributes from the objects that are selected on the Results Attribute page. Specify as many criteria rows as needed, or save a criteria selection for later use to use as a predefined query selection in the current query.

By using indentation in expressions, you can create queries that are as complex as you need. Query Builder intelligently parenthesizes the expressions to ensure that the query is evaluated correctly.

Field or Control	Description
Attribute Name	Select the attributes from the objects connected to the class ID you're querying. Click the Select an Attribute button to view a list of all defined attributes for the object on the Select Criteria page. Select an attribute to return to the Criteria page.
Operator	Select an operator to define the condition for the criteria.
Value	Enter a value for the selected attribute to use as query criteria.

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Selecting a Value

Access the Select Value page to select the values that you want to use to filter the query. The fields on the page differ depending on the operator that you select on the Criteria page.

If you use the between or not between operators, you select a **From** and **To** value.

If you used the like, not like, equal to, not equal, greater than, less than or equal to, less than, or greater than or equal to, you select a value for the system to compare the result to.

If you use the in or not in operator, you can select one or more check boxes for the values within which you want the system to return the results.

At any point while defining the criteria, you can click the View Results button to run the query, and then return to the Criteria or Results Columns page to modify or (optionally) save the definitions.

Working with Criteria

Field or Control	Description
View Results	Click to view the results of the query on the Results page.
Clear Criteria	Click to remove all current attribute names and value selections and start over.
Save Criteria	(Optional) Click to save current attribute name and value selections. After selecting the criteria, you can save the query definition for future use. On the Save Criteria page, enter a name and description for the query and indicate whether or not you want it to be a private query.
Load Criteria	(Optional) Click to load predefined attribute name and value selection. This page works just like the Load Columns page, and displays all of the query criteria sets that are saved by all users as well as the sets that you save and mark as private.

Query Builder - Results Page

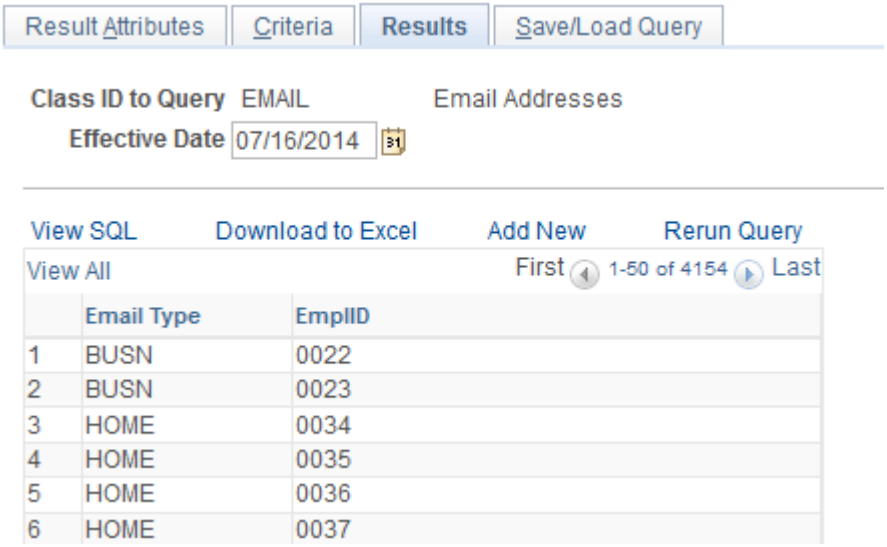
Use the Results page (EQRY_RESULT_PG) to review the results of your query.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Query Builder**, and then **Query Builder**, and then **Results**

This example illustrates the fields and controls on the Query Builder - Results page. You can find definitions for the fields and controls later on this page.

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Use the Query Builder - Results page to view the results of the query. You can click any of the links that are in the results columns to go to the application page where the attribute is defined.

Select to view the query SQL, download the query results into Excel, add new criteria, or rerun the query.

> **Note**
>
> When you select to download the current query results to a Microsoft Excel spreadsheet, only the results currently displayed on the page are downloaded to the spreadsheet. To download all query results, click the **View All** link, and then click the **Download to Excel** link.

Aggregations Grid

Shows the results sorted and totaled based on the check boxes that you select on the Results Columns page. This grid is only visible if you select the **Aggregations** check box on the Results Columns page.

Query Builder - Save/Load Query Page

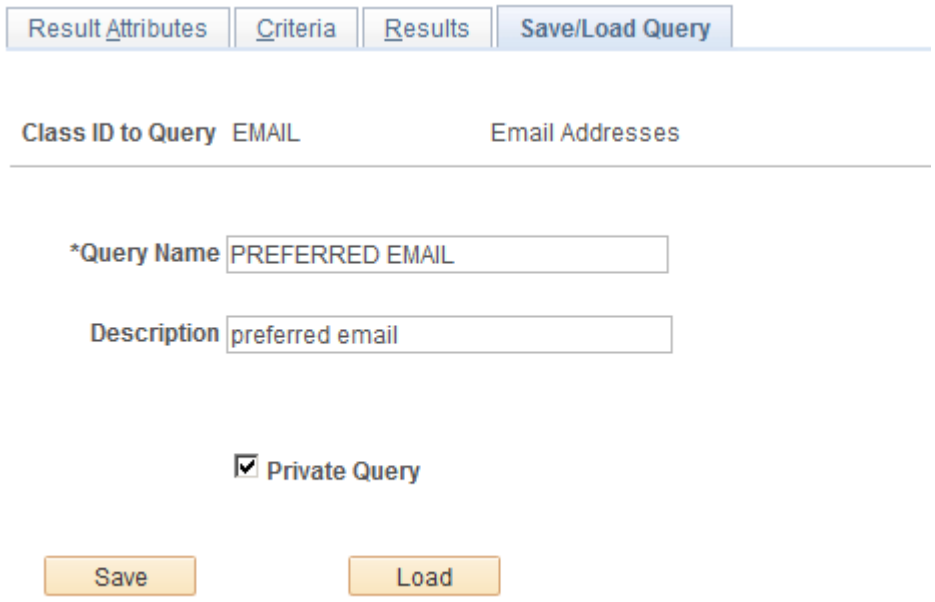
Use the Query Builder - Save/Load Query page (EQRY_COMBO_SAVE_PG) to save the current query or load a predefined query.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Query Builder**, and then **Query Builder**, and then **Save/Load Query**

This example illustrates the fields and controls on the Query Builder - Save/Load Query page. You can find definitions for the fields and controls later on this page.

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While defining a query, you can save the result attributes and criteria as separate definitions. This allows you the flexibility to mix and match various result attributes and criteria. You can also save a query definition, which is a combination of an output (result attributes) selection and a criteria selection.

Field or Control	Description
Query Name	Enter a name under which to save the query. When you save a Query Builder query, both the result attributes and the criteria selection are saved.
Private Query	Select to make the query private and available only to the user who created it.
Load	Click load to load a predefined query.

Pre-defined Queries Page

Use the Pre-defined Queries page (EQRY_VIEWER_PG) to run a query that you've predefined on the Query Builder component.

The page looks like the Query Builder - Results Page.

Navigation:

Set Up HCM, and then **Product Related**, and then **Compensation**, and then **HCM Query Builder**, and then **Pre-defined Queries**

Select a query by searching on output and criteria combination, description, original class ID, or a combination of these. Then click the query result that you want to run. Click the View Definition link to access the Query Builder component, where you can change the results columns, attributes, or criteria of the query and rerun the query.

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> **Note**
>
> Predefined queries are also available by loading existing query definitions from within Query Builder.

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Working with HCM Transformation Framework

Understanding the Transformation Framework

When an application sending a service operation uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. HCM Transformation Framework uses definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

HCM Transformation Framework enables seamless integration among PeopleSoft applications as well as with third-party applications such as Oracle, SAP, and Siebel. Transformation schemas are associated with transformation maps, enabling you to quickly locate and modify a schema to respond to external changes.

The transformation map registry is made up of transformation maps. The transformation map defines the message properties of the message for both the target and source application. For each transformation map, create a transformation schema, an XML document that defines the message structure mapping between two applications.

When a message needs to be transformed in order to be successfully received by an application, you need to assign a transformation program with the message on the Integration Broker Relationships component (IB_RELATIONSHIP).

There are six transformation programs supported by the transformation framework:

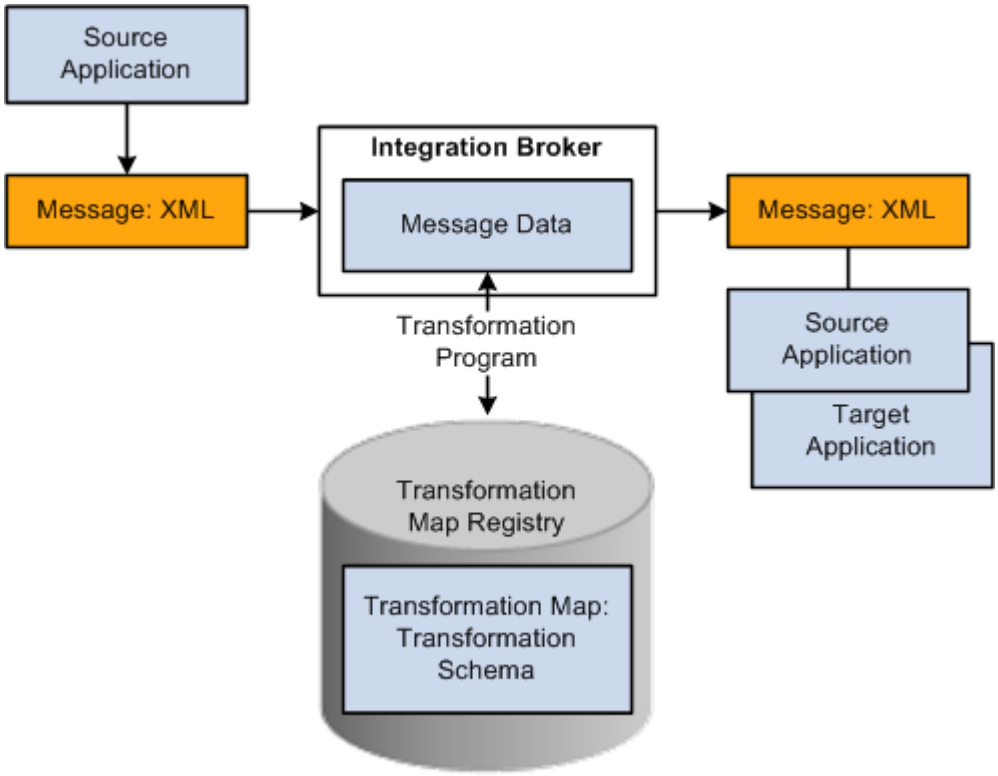
- HTMF_TR_IA, for inbound asynchronous communications.
- HTMF_TR_IS, for inbound synchronous communications.
- HMTF_TR_ISR: for the inbound synchronous response.
- HTMF_TR_OA, for outbound asynchronous communications.
- HTMF_TR_OS, for outbound synchronous communications.
- HMTF_ TR_OSR for outbound synchronous responses.

Based on the type of transaction, choose the appropriate transformation program to associate with your message.

When an application publishes a message that requires transforming, PeopleSoft Integration Broker invokes the transformation program associated with the message. The transformation program determines which transformation map corresponds to the target message and applies the transformation schema to the message data using XSLT, an XML translation language. The transformation schema can modify the metadata or the message data itself to comply with the target application requirements. PeopleSoft Integration Broker repackages the transformed message data into an XML document that is structurally compliant with the target application. The Integration Broker can then deliver the message to the receiving application.

This diagram illustrates the flow of information from one application to another using HCM Transformation Framework:

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See *PeopleTools: PeopleSoft Integration Broker,* "Applying Filtering, Transformation and Translation"

Base Message Format in PeopleSoft Integration Broker

Before you create a transformation schema, it helps to understand the base XML document format used by PeopleSoft Integration Broker to package application data:

```
<?xml version="1.0"?>
<PeopleSoftMessageName>
    <FieldTypes>
        <RecordName1 class="R">
            <fieldname1 type="CHAR"/>
            <fieldname2 type="NUMBER"/>
            ...
        </RecordName1>
        <RecordName2 class="R">
            <fieldname1 type="CHAR"/>
            <fieldname2 type="NUMBER"/>
            ...
        </RecordName2>
        ...
    </FieldTypes>
    <MsgData>
        <Transaction>
            <RecordName1 class="R">
                <fieldname1>Fieldvalue</<fieldname1>
                <fieldname2>Fieldvalue</<fieldname2>
                 ...
```


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```
            <RecordName1>
            <RecordName2 class="R">
                <fieldname1 type="CHAR"/>
                <fieldname2 type="NUMBER"/>
                 ...
            </RecordName2>
        <PSCAMA class="R">
            <AUDIT_ACTN>ActionCode</AUDIT_ACTN>
             </PSCAMA>
                    ...
        </Transaction>
        ...
    </MsgData>
</PeopleSoftMessageName>
```

This format is then packaged into an XML document for transmission to the target application. If you have attached one of the supported framework transformation programs to the message, the transformation program identifies the appropriate transformation map and applies the transformation schema to the message, modifying its structure. The message is then repackaged into an XML document in its altered form and delivered.

> **Note**
>
> The transformation message must be supported by the transformation framework. Only supported programs can work with the transformation maps. You can also add configured Application Engine or XSLT transformation programs as part of the relationship definition independent of the transformation framework.

The transformation program can modify the following elements of the standard message structure:

Term	Definition
PeopleSoftMessageName	The name of the message as it is defined in PeopleSoft using Application Designer. The transformation program can change the message name.
FieldTypes	The metadata for the records and their fields. The transformation program can select the fields required by the target applications and can change their names.
Transaction	Contains the data for the records and their fields and organizes them into a hierarchy. The record tags at each level contain the fields for that record. The transformation program can select one or more record subsets and their fields or just a subset of fields required by the target service operation and can change their names.

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Term	Definition
PSCAM (PeopleSoft Common Application Message Attributes)	The last record within a transaction that provides information about the entire transaction. The PSCAMA record contains fields that are common to all messages. The <PSCAMA> tag repeats for each row in each level of the transaction section of the message. The sender can set PSCAMA fields to provide basic information about the message, for example, to indicate the message language or the type of transaction a row represents. The transformation program copies this structure to the target message structure.

Setting Up and Managing HCM Transformation Maps

To set up and manage HCM transformation maps, use the Register Transformation Map component (HMTF_WZ_STEP1) and the Transformation Registry component (HMTF_TRF_REGISTRY).

These topics discuss setting up and managing HCM transformation maps.

Pages Used to Set Up and Manage HCM Transformation Maps

Page Name	Definition Name	Usage
Register Transformation Map Page	HMTF_WZ_STEP1	Define or modify transformation maps (transformation XML schemas).
Transformation Registry Page	HMTF_TRF_REGISTRY	Organize the transformation maps by message name, message version, application version, and transaction type. Click a transformation map URL to modify the transformation map

Register Transformation Map Page

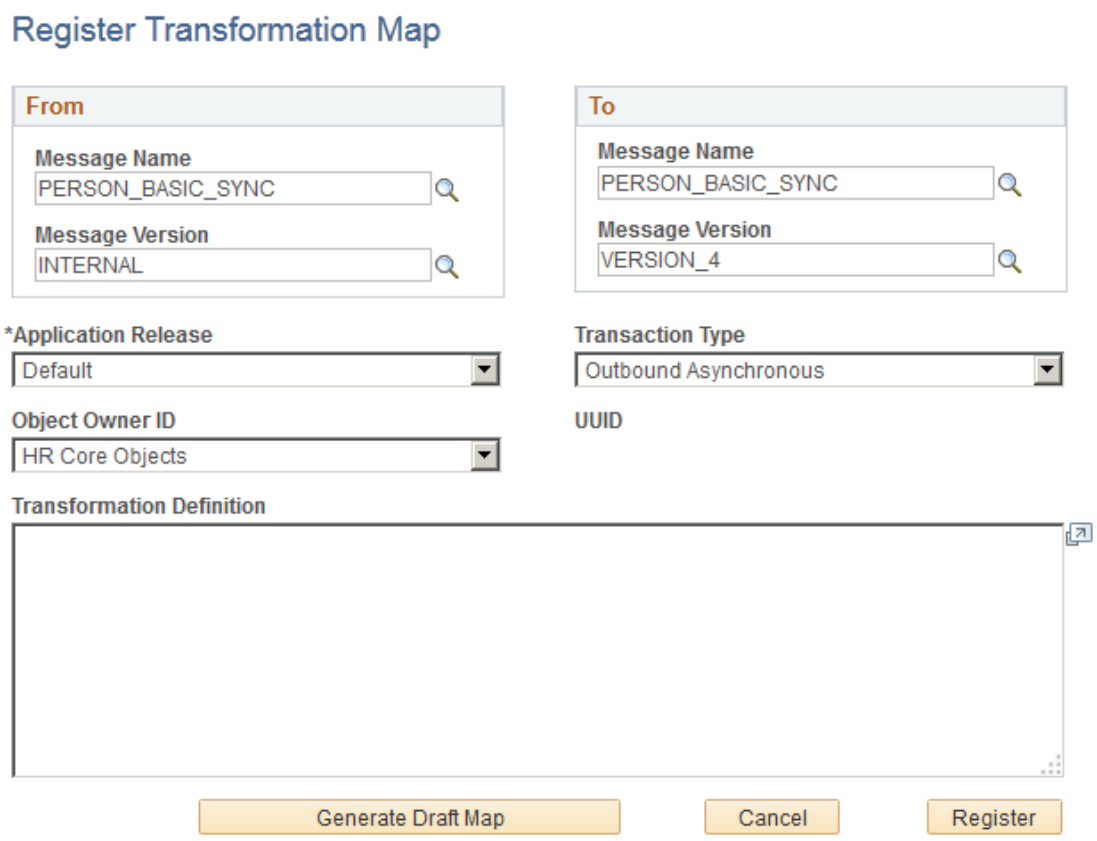
Use the Register Transformation Map page (HMTF_WZ_STEP1) to define or modify transformation maps (transformation XML schemas).

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Register Transformation Map**, and then **Register Transformation Map**

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

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The system stores the map as an HTML template in the portal registry (HC_REGISTRY) in the HCM Transformation Maps component.

Field or Control	Description
Message Name and **Message Version**	Select the message name and version for both the source (From) and target (To) application.
Application Release	Select the release of the source application.
Transaction Type	Indicate if the type of transaction is *Inbound Synchronous, Inbound Asynchronous, Outbound Synchronous, Outbound Asynchronous, Inbound Synchronous Response,* or *Outbound Synchronous Response.*
Object owner identifier	Select the owner of the object.
Transformation Definition	Define the mapping information (schema) to map the source service operation structure to the target service operation structure.

Defining the Transformation Schema

The transformation definition contains the following code:

```
   <?xml version="1.0"?>
   <transformation type="IA"application_release="Application Name and?
Release"default_node="Default Node Name">
       <structure>
```


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```
            <message message_name="Original Message Name"
new_message_name="New Message?
 Name">
                 <TargetMessageRecord class="R"
source_record="SourceMessageRecord ">
                     < TargetMessageRecordField1 type="CHAR"
value="DefaultValue"/>
                     < TargetMessageRecordField2 type="CHAR"
source_field="SourceMessageRecord?
Field" [source_record="SourceMessageRecord"/>
                     ...
                 </TargetMessageRecord>
            </message>
         </structure>
    </transformation>
```

Enter values in the following elements:

XML Tag	Elements	Values
transformation	type	Enter a transformation type. Supported values are: • Inbound Asynchronous. • Inbound Synchronous. • Outbound Asynchronous. • Outbound Synchronous.
application_release	(Optional) Enter the Category.AppRelease property of the relationship defined in PeopleSoft Integration Broker.	
default_node	(Optional) Enter the default node to be used.	
message	message_name	Enter the name of the source service operation.
new_message_name	(Optional) Enter the name of the message in the transformed structure.	
[TargetMessageRecord] **Note:** Edit this tag so that it is the name of the target message record.	class	Enter the element class. The value is *R* for PeopleSoft record based message structure.
source_record	(Optional) Enter the name of the source record. You should enter a value if the names of the source and target records are different.	
[TargetMessageRecordField] **Note:** Edit this tag so that it is the field name in the target message record.	type	Select the data type of the field of the transformed message for the target application. Valid values are: • CHAR • DATE • NUMBER

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XML Tag	Elements	Values
source_field or value	Enter the name of the source record field name whose values should be copied in the transformed message structure for the target application *or* enter the default value that should be copied in the transformed message structure for the target application. **Note:** Enter a value in source_field or value, but not both.	

Transformation Registry Page

Use the Transformation Registry page (HMTF_TRF_REGISTRY) to organize the transformation maps by message name, message version, application version, and transaction type.

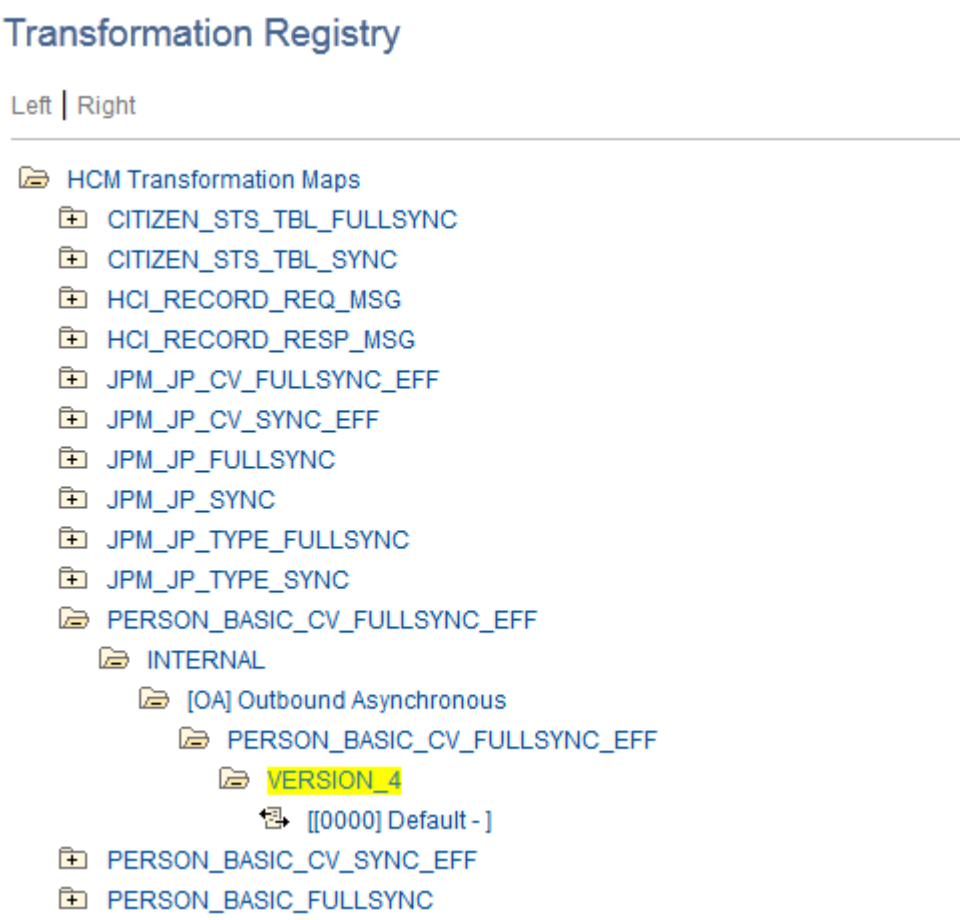
Click a transformation map URL to modify the transformation map

Navigation:

Set Up HCM, and then **System Administration**, and then **HCM Registry**, and then **Transformation Registry**, and then **Transformation Registry**

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

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Drill down to the transformation map by message name, message version, application version, and transaction type. Click the template URL to access the Transformation Map page for the transformation map.

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Setting Up and Generating Form Letters

Understanding PeopleSoft HCM Form Letters

These topics list prerequisites and discuss using PeopleSoft HCM form letters.

Prerequisites

Use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the sample form letters that are delivered with PeopleSoft HCM. The PeopleSoft Process Scheduler runs a job that:

1. Executes a Structured Query Report (SQR), with SQRibe Technology's Structured Query Report Writer to extract data from the database.
2. Merges the data into a document template, with Word as the word processor.
3. Posts the resulting letters on the web server.

If you currently use a report writer other than SQRibe Technology's Structured Query Report Writer or a word processor other than Word, review the information in these topics to understand the steps that are involved in generating form letters. Then, consult your report writer or word processor documentation to modify the procedures to fit the sample letters.

Once you are familiar with the sample form letters, you can modify the letters or create new ones for other tasks.

> **Note**
>
> To generate letters, you should be familiar with the Word mail merge functions.

Related Topics

- Adapting Form Letters
  Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the **Letter Code** field to other pages in PeopleSoft Human Resources.

Using PeopleSoft HCM Form Letters

PeopleSoft HCM delivers a set of sample form letters for use with PeopleSoft HCM applications. There are two methods for generating form letters; one for PeopleSoft Human Resources and one for applications other than PeopleSoft Human Resources (referred to as other PeopleSoft HCM applications).

Please follow the appropriate method to create your form letters successfully.

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Many human resource management activities involve sending out routine letters and memos on a regular basis. For example:

- (PeopleSoft Human Resources) Letters announcing course session enrollments, cancellations, and rescheduling.
- (PeopleSoft Global Payroll, Pension Administration, Benefits Administration) Letters, notification forms, and plan updates.

The wording of such letters doesn't change much from mailing to mailing; what does change is information such as addresses and dates. In PeopleSoft HCM, you can create form letters in your word processor by accessing the data that you need from your human resources database.

You can generate several types of letters and print them all at the same time, or you can generate letters now and print them later, if you prefer to review them first. Three sample form letters are provided at the end of these topics.

Related Topics

- PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Understanding Student Enrollment Options
- PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Generating Student Form Letters
- PeopleSoft Human Resources Manage Labor Administration: Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

Generating Form Letters for PeopleSoft Human Resources

These topics provide an overview of form letters for PeopleSoft Human Resources and discuss how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Set up form letters.
- Prepare to print form letters.
- Adapt form letters.
- Troubleshoot form letters.

> **Note**
>
> These instructions show you how to use templates to create form letters for PeopleSoft Human Resources. To create form letters for other PeopleSoft HCM applications, you follow a different method. Please follow the appropriate instructions to create your form letters.

Related Topics

- Generating Form Letters for Other PeopleSoft HCM Applications
  These topics provide an overview of form letters for other PeopleSoft HCM applications and discuss how to:

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Understanding Form Letters for PeopleSoft Human Resources

PeopleSoft delivers a set of sample letters for use with the following:

- PeopleSoft Human Resources: Administer Training
- PeopleSoft Human Resources: Manage Labor Administration

The form letter processes search the database for records that have been tagged with specific letter codes. For example, when you enroll an employee in a training course using the Administer Training business process, you can add a letter code to the employee record that identifies the type of letter required. When you later run the training letter report, the system searches for records with the letter codes for training letters.

The form letter processes use Word to generate the letters based on data extracted from the PeopleSoft database.

To generate form letters for PeopleSoft Human Resources:

1. Create letter codes by using the Standard Letter Table page (STANDARD_LTR_TABLE).

   Letter codes represent form letters and are used to link a record to the required letter.

2. Tag people's records with the appropriate letter code in the PeopleSoft Human Resources database.

   Enter a letter code into the records of applicants, employees, contingent workers, or people of interest to flag the record when it's time to generate a form letter.

   For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee, contingent worker, and person of interest records.

3. Generate form letters by running a report that runs the following processes:

   a. An SQR data extract process.

   b. A WinWord WORDINIT process.

   c. The PSMERGE Application Engine process.

   The final step is completed by the Distribution Agent that moves the letter files to the Report Repository.

4. Send training letters by email.

   This step is for the training letters only. The system also emails training letters to students if their email addresses are in their person records.

   > **Note**
   >
   > You must configure SMTP and activate Workflow to automatically send training letters by email.

   See *PeopleTools System and Server Administration*

5. Print the letters by using Microsoft Word.

   The system creates the form letters in a temporary directory on the web server, putting all letters of the same type in one file.

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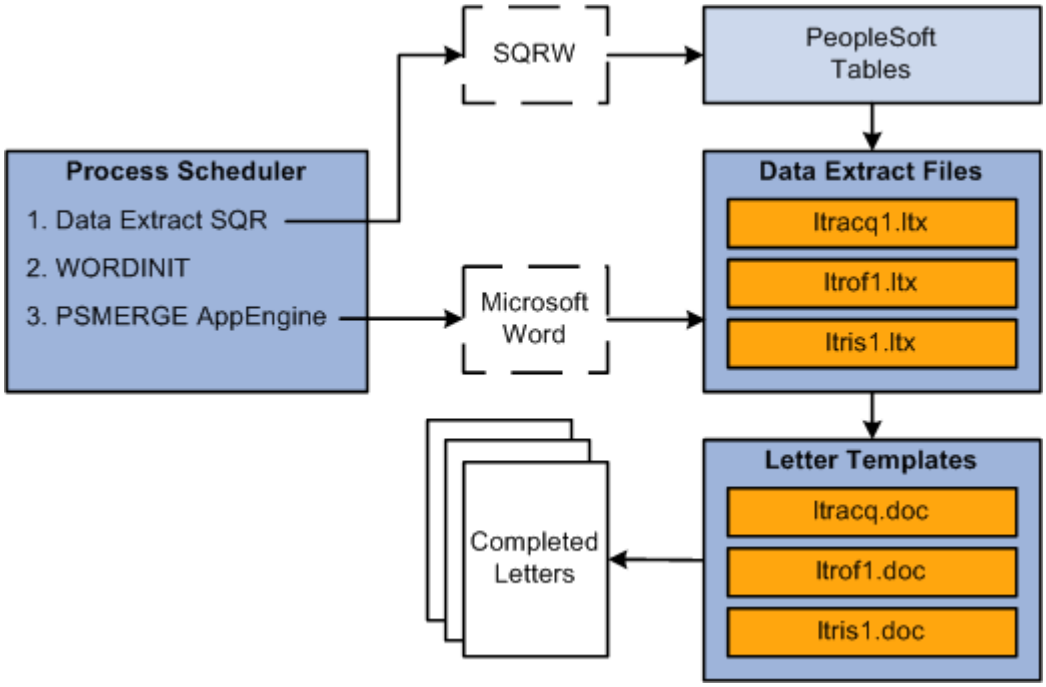
The distributed architecture of the PeopleSoft Human Resources system enables you to access the application server far from local machines therefore the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word print options.

Related Topics

- Setting Up Standard Letter Codes
  To set up standard letter codes, use the Standard Letter Table component (STANDARD_LTR_TABLE).

Generating Form Letters

This diagram and the steps below illustrate how PeopleSoft Process Scheduler generates form letters for PeopleSoft Human Resources:



Step 1: SQR Data Extract Process

The SQR data extract process:

- Identifies records in the database with the appropriate letter codes (and no print date).
- Extracts data from these tagged records.
- Updates the Print Date field in the tagged records.
- Creates a data extract file (with an .ltr extension) that contains the data for each letter.

  For example, the file containing data for offer letters is ltrof1.ltr, where of1 represents offer letter, and .ltr represents letter.

The SQR process sends its output to the log/output directory defined for SQR reports. Define the log/output directory in the Process Scheduler configuration file.

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Step 2: WORDINIT WinWord Process

The WORDINIT WinWord process is an initialization process. Its purpose is to ensure that the PSMERGE application engine process can retrieve the location of:

- The executable file for Microsoft Word, winword.exe.
- The PS_HOME directory that contains the letter templates.

The WORDINIT process runs winword.exe and a dummy macro called PSINIT which opens and closes the psmerge.doc file without creating any output. By including the WORDINIT WinWord process in the job definition, the Process Scheduler ensures that it has loaded the location of the winword.exe file into PSPRCSPARMS.

The PSMERGE application engine process uses this information to call Microsoft Word.

Step 3: PSMERGE Application Engine Process

The PSMERGE Application Engine process completes the merge of the data extract files and the Word templates. It:

- Retrieves the locations of the data extract files, winword.exe and the PS_HOME Winword directory.
- Creates a file called param.txt in the log/output directory.

  This file contains the locations of the files and a list of files to be merged.
- Calls Microsoft Word to carry out the merge.

  Microsoft Word:
  - Opens the form letter templates that correspond to the data extract files.
  - Merges the appropriate extract file data into the field codes for each template.

    For example, the offer letters template is ltrof1.doc and it includes field codes for names, addresses, and offer amounts.
  - Inserts the data from the appropriate .ltr file into the template field codes.

    For example, it inserts the data from the ltrof1.ltr extract file into the ltrof1.doc template.
  - Places the resulting letters in the log/output directory.

Using Naming Conventions in Form Letter Files

Before you adapt existing form letters or create new ones, you should be familiar with the naming conventions for each element of the process. Use the same naming conventions for the new form letter components that you create.

These topics discuss how to:

- Use letter codes.
- Use data extract files and corresponding Word letter templates.

Using Letter Codes

You create letter codes in the Standard Letter Table component. Use letter codes to indicate what kind of letter is required for a particular record. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed below.

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Using Data Extract Files and Corresponding Word Letter Templates

The extension .ltr represents form letters and the extension .doc is the normal templates extension. Every letter code for which you generate form letters must have a corresponding data extract file and a template with the same name of the data extract file:

Object	Example
New letter code	xyz
Data extract file name	aaaxyz.ltr
Template name	aaaxyz.doc

The letter codes and their associated data extract files and Word templates include:

- Training letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of session enrollment	CON	ltrcon.ltr	ltrcon.doc
Rescheduling of course session	RSC	ltrrsc.ltr	ltrrsc.doc
Cancellation of course session	CAN	ltrcan.ltr	ltrcan.doc

> **Note**
>
> The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

- Labor Administration letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of Disciplinary Action Filed	DAF	ltrdaf.ltr	ltrdaf.doc
Confirmation of Disciplinary Action Resolution	DAR	ltrdar.ltr	ltrdar.doc
Confirmation of Grievance Filed	GRF	ltrgrf.ltr	ltrgrf.doc
Confirmation of Grievance Resolution	GRR	ltrgrr.ltr	ltrgrr.doc

Setting Up Form Letters

These topics discuss how to:

- Set up the Process Scheduler.
- Set up WinWord security.

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- Set up document templates.
- Run the WORDSAMP process.
- Specify the output type and format of the SQR process.

Setting Up the Process Scheduler

To set up your Process Scheduler to generate form letters:

1. Install the Microsoft Word on the same machine that runs the Process Scheduler.
2. Define the WINWORD parameter in the Process Scheduler configuration file.

   The WINWORD parameter defines the location of the Microsoft Word executable file, winword.exe on the server. Make sure that there are no spaces in the path and the path does not end with a slash (/).
3. Use the Process Scheduler Manager to define a server specifically for running the form letter processes.

   Select **PeopleTools**, and then **Process Scheduler Manager**, and then **Use**, and then **Server Definitions** to define the server. On the Distribution page, leave the **Transfer Log Files to Report Repository** check box deselected.

If you run the Process Scheduler as a service, modify the service to interact with the desktop:

1. From the Windows Control Panel, open Administrative Tools, Services.
2. Open the Process Scheduler service and access the log on tab.
3. For the Log on as field, select Local System account and select the Allow service to interact with desktop check box.

   This enables Microsoft Word to run in the foreground of the server. You cannot run Microsoft Word macros as a background service.

See *PeopleTools PeopleSoft Process Scheduler,* “Using the PSADMIN Utility".

Setting Up Winword Security

To run the macro that completes the merge, you must set the macro virus protection to Low. To do this:

1. Run Microsoft Word and select Tools from the menu bar.
2. Configure security according to the version of Word you are running.

See *Microsoft Word Legal User's Guide*

Setting Up Document Templates

To generate form letters, the document templates and the macros must be located in the directory %PSHOME%\winword.

Check that the files psmerge.doc and psmerge.dot, and all the document templates in this directory are read-only.

Running the WORDSAMP Process

Before running any of the form letters processes, test your environment by running the WORDSAMP process. If this process runs successfully, this demonstrates that the environment is correctly configured to run Microsoft Word processes.

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> **Note**
>
> To verify that the WORDSAMP process has successfully completed verify that it has created a document called wordsamp.doc.

To run the WORDSAMP process:

1. Select **PeopleTools, Process Scheduler, System Process Requests.** Select a Run Control ID and click Run.
2. The Process Request Dialog page (PRCSSAMPLEPNL1) appears.
3. Select your server in the Server Name field and select the Win Word Sample Process check box.
4. Click OK.
5. Click the Process Monitor link to check that the process runs successfully (Run Status is *Success*).
6. Check that a document wordsamp.doc is created. This document is posted to the Report Repository as a normal report.

   If the process doesn't run successfully or the process doesn't create wordsamp.doc, then your environment is not set up correctly to run WinWord processes.

See *PeopleTools PeopleSoft Process Scheduler,* "Submitting and Scheduling a Process Request".

Specifying the Output Type and Format of the SQR Process

When you run the form letter report to generate letters, make sure that the Type and Format fields are set up correctly for the SQR data extract process. The SQR process must be set up with Type set to *File* and Format set to *LP.*

For example, if you are creating a training letter, check the output type and format as follows:

1. Select **Administer Training**, and then **Student Enrollment**, and then **Create Training Letters**, and then **Create Training Letters** page (RUNCTL_TRN001).
2. Enter run parameters and click Run.
3. On the Process Scheduler Request page, click *Training Letters* to access the Job Detail page.
4. In the Process List group box, which lists the three processes run to generate letters, locate the SQR process TRN001 and select *File* in the **Type** field and *LP* in the **Format** field.

For information about running the form letter reports, refer to the appropriate PeopleSoft Human Resources documentation.

See PeopleSoft Human Resources Manage Labor Administration: Tracking Disciplinary Actions.

See PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Generating Student Form Letters.

See PeopleSoft Talent Acquisition Manager: Generate Recruitment Letters Page.

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Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

  The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word, you print them to your local printers.

To set up the system to print form letters:

1. On the Servers - Distribution page, create a new dedicated Process Scheduler leaving the Transfer System Files to Report Repository check box deselected to run form letters.
2. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See *PeopleTools: PeopleSoft Process Scheduler*.

Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the **Letter Code** field to other pages in PeopleSoft Human Resources.

These topics discuss how to:

- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.
- Add letter code fields to pages.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks that you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

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Templates are located in the directory \PS\WINWORD.

2. In Microsoft Word, open the document that you want to modify.

   If you see " " in the document, select **Tools**, and then **Options;** then select the **Field codes** check box.

3. Make changes to the text as you would in any other document and save the file.

> **Warning**
>
> Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft Human Resources.

> **Note**
>
> To make this change, you should be familiar with Microsoft Word fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include title in the Training Enrollment Confirmation letter ltrcon.doc, add a title field code to the form letter template. Also add a variable for title in TRN001.sqr so that the SQR retrieves the title value and writes it to the data extract file.

   Here's what the data extract file looks like before the change:

```
systemdate, Name, . . .,


"August 10, 2001", "Barry Robert Campbell"
```

   Here's what it looks like after the change:

```
systemdate, Name, Title....


"August 10, 2001", "Barry Robert Campbell", "Director". . .
```


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Creating New Form Letters

You can create form letters for different purposes. For example, you might want to create a form letter notifying students they are on the waiting list for a course session.

To create a new form letter:

1. Create a new letter code in the Standard Letter table.
2. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   The file name of the template must match the data extract (.ltr) file name. For example, if the data extract file is app004.ltr, the Word template file must be called app004.doc.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

   For example, create a form letter for interview schedules **(INT)** by adapting the offer letter template. In the directory \PS\WINWORD, open ltrof1.doc. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, ltrint.doc.
3. Edit the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.

   Insert the MERGEFIELD field code where you want the merge process to insert data from the data extract file into the letter. Press ALT + F9 to insert the MERGEFIELD field code.

   For example, to create a new form letter for interview schedules, you create new procedures in app007.sqr to extract values from all the fields and create a separate data extract file to store interview schedule letter information.

   The SQR process must include the name and extension (.ltr) of the data extract file that is created. An example is:

```
begin-procedure Write-Heading
move '{IMPORTPREFIX}' to $FileName !start a new report file
do Get-prcsoutputdir
if (rtrim($prcsoutputdir,' ') <> '')
move $prcsoutputdir to $Filename
concat 'APP004.LTR' with $Filename
end-if
NEW-REPORT $Filename
Let $InputField1 =
'LANG,Audience,Job_Requisition,JobTitle,DeptID,DeptName,Min_Rt_⇒
Annual,Max_Rt_Annual,Name1,Value1,Name2,Value2,Name3,Value3,Name4,Value4,Na
me5,Val⇒
ue5,Name6,Value6,Name7,Value7,Name8,Value8,'
Let $InputField2 =
'Name9,Value9,Name10,Value10,Name11,Value11,Name12,Value12,Name1⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
```


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```
⇒
⇒
⇒
⇒
⇒
⇒
3,Value13,Name14,Value14,Name15,Value15,Name16,Value16,Name17,Value17,Name1
8,Value1⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
8,Name19,Value19,Name20,Value20,AsOfToday'
Let $InputFieldTot = $InputField1 || $InputField2
move
$InputFieldTot
to $ioarea
print $ioarea (1,1)
next-listing
end-procedure
```

If you create an Application Engine process, the file created by the process must have an .ltr extension.

See *PeopleTools SQR for PeopleSoft Developers*

4. Copy the new letter template to the Process Scheduler %PS_HOME%\winword directory.
5. Create a PSJOB to ensure that the SQR, WORDINIT, and PSMERGE processes are run in the correct order.

   Define the job to include these steps in the following order:

   a. SQR process or Application Engine data extract process.
   b. WORDINIT Winword process.
   c. PSMERGE application engine.

> **Note**
>
> PeopleSoft recommends that you do not modify any of the delivered Winword macros or templates.

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> **Note**
>
> To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

Adding Letter Code Fields to Pages

We deliver PeopleSoft Human Resources with Letter Code fields in several pages in Administer Training, Administer Workforce, and Manage Labor Relations.

You can add the **Letter Code** field to any other pages (and their underlying tables) in PeopleSoft Human Resources. For example, if you routinely send letters to employees, notifying them of career planning sessions, you can add the **Letter Code** field to one of the pages from the Plan Careers menu.

> **Note**
>
> To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word field codes, macros, and data statements; and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular application.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- A job containing the SQR, WinWord process WORDINIT, and the Application Engine PSMERGE.

See *PeopleTools: Application Designer Developer's Guide* "Working With Processes and Reports"

See *PeopleTools: Process Scheduler*.

Troubleshooting Form Letters

These topics discuss:

- Troubleshooting the SQR process.
- Troubleshooting the WORDINIT process.
- Troubleshooting the PSMERGE Application Engine process.
- Troubleshooting the Process Scheduler.
- Troubleshooting the Winword Directory.
- Troubleshooting Winword processes.
- Troubleshooting the PSMERGE process.

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Troubleshooting the SQR Process

For the SQR data extract process check that:

- The process is run with the output Type set to *File* and Format set to *LP.* If you have run the SQR with any other output type or format, make sure that you delete these data extract files.
- The data extract file has been produced in the format xxx.ltr in the Process Scheduler log/output directory.
- Use the Process Monitor to delete all failed Process Requests.

Troubleshooting the WORDINIT Process

If the WORDINIT process fails and the environment is correctly configured, the most likely cause is macro security. Switching off the macro security works for some Microsoft NT networks. You may also need to consult your Systems Administrator.

In some networks, Microsoft Word automatically switches the security level back to "high" when running the process. For example, if Winword macro security is defined at the NT User Profile level then you need to set macro security to "low" for the NT ID that starts the PeopleSoft Process Scheduler service.

> **Note**
>
> Windows locks and caches the macro virus protection settings for Winword and this may cause difficulties when turning off the macro virus protection.

Try hard-coding the path to PS_HOME in the Process Definition for WORDINIT:

1. Navigate to **PeopleTools**, and then **Process Scheduler**, and then **Processes.**
2. Select Process Name in the **Search By** field and enter WORDINIT.
3. Select the Override Options page.
4. In the Parameters field replace %%PS_HOME%% with the hard-coded path to the directory.

Troubleshooting the PSMERGE Application Engine Process

If the PSMERGE Application Engine process does not complete and you have added extra fields to the SQR data extract process, check that the fields have also been included in the document template and that the fields occur in the same order.

Troubleshooting the Process Scheduler

Check that the Process Scheduler is configured correctly:

- You must define a separate Process Scheduler server at Process Scheduler Definition level with the Transfer Log Files to Report Repository check box deselected.
- Confirm that the WINWORD parameter is correctly specified in the prcs.cfg file.

Check that all failed attempts at running the form letters have been deleted using the Process Monitor. Delete any Process Requests that have failed.

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Use the Windows Task Manager to check that there are no Winword processes still running. Delete these before rerunning the form letter report.

Once Microsoft Word is interacting with the desktop it may try to reinstall itself. To avoid this, disable the Windows Installer.

Troubleshooting the Winword Directory

Check that the template files are in the correct directory with the correct access:

- The Winword templates and the macros must be located in the %PS_HOME%\winword directory.
- The files psmerge.doc and psmerge.dot and the document templates in the %PSHOME% \winword directory must be read-only.

See *PeopleTools PeopleSoft Process Scheduler*

Troubleshooting Winword Processes

To display errors and debug the Winword Processes, modify your Process Scheduler configuration file, psprcs.cfg, by adding the following line to the Process Scheduler section of the file (after the line for the Allow Dynamic Changes parameter):

```
Allow To Interact With Desktop=1
```

Save the changes, clear the cache and re-start the application server.

See *PeopleTools PeopleSoft Process Scheduler,* "Using the PSADMIN Utility".

Troubleshooting the PSMERGE Process

If the PSMERGE Application Engine process is failing or the status remains as *Processing,* take the trace file, AE_PSMERGE_<PI>.trc (where <PI> is the process instance number), and extract the arguments from the file, combine them and run them from a command line. This tests the process outside the Process Scheduler.

For example if AE_PSMERGE_<PI>.trc is set up as follows:

```
cmd = D:\PSHR88\WINWORD\run.bat
    cwd = (null)
    argc = 5
    argv[0] = D:\PSHR88\WINWORD\run.bat
    argv[1] = C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
    argv[2] =
D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
    argv[3] = D:\PSHR88\WINWORD\PSMERGE.DOC
    argv[4] = /mPSMERGE
```

You run them from the DOS command line as follows:

```
D:\PSHR88\WINWORD\run.bat  C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
D:\PSHR88\WINWORD\PSMERGE.DOC  /mPSMERGE
```

See *PeopleTools PeopleSoft Application Engine, "Tracing Application Engine Programs"*

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Setting Up Standard Letter Codes

To set up standard letter codes, use the Standard Letter Table component (STANDARD_LTR_TABLE).

This topic discusses how to set up standard letter codes.

> **Note**
>
> You set up letter codes only for PeopleSoft HCM form letters used with PeopleSoft Human Resources. You do not set up letter codes for PeopleSoft HCM form letters used with other PeopleSoft HCM applications.

Pages Used to Set Up and List Standard Letter Codes

Page Name	Definition Name	Usage
Standard Letter Table Page	STANDARD_LTR_TABLE	Define your letter codes.
Standard Letter Report - Run Control Page	PRCSRUNCNTL	Run the Standard Letter Table report (PER711) that lists the codes in your Standard Letter table.

Standard Letter Table Page

Use the Standard Letter Table page (STANDARD_LTR_TABLE) to define your letter codes.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Standard Letter Table**, and then **Standard Letter Table**

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



PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

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> **Note**
>
> PeopleSoft delivers a letter code for each template, but not all letter codes have a template. Before you use a letter code, confirm that there is a corresponding template.

Field or Control	Description
Set Letter Code	Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are: • *COBRA Letter:* Select for COBRA letters • *Customer Letters:* Select if you have created letters for your organization that don't fit into any other category. • *Employee Review Letters:* Select for employee review letters. • *HIPPA Certificate:*Select for HIPPA letters. • *Manage Labor Relation:* Select for labor relations letters. Standard disciplinary and grievance letters. • *Recruitment Letters:* Select for applicant letters. • *Training Letters:* Select for training letters. The system uses the **Set Letter Code** field to determine which letter codes to list for the **Set Letter Code** fields.

Generating Form Letters for Other PeopleSoft HCM Applications

These topics provide an overview of form letters for other PeopleSoft HCM applications and discuss how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Prepare to print form letters.
- Adapt form letters.

> **Note**
>
> These instructions show you how to use templates to create form letters for other PeopleSoft HCM applications. To create form letters for PeopleSoft Human Resources, you follow a different method. Please follow the appropriate instructions to create your form letters.

Related Topics

- Generating Form Letters for PeopleSoft Human Resources
  These topics provide an overview of form letters for PeopleSoft Human Resources and discuss how to:

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Understanding Form Letters for Other PeopleSoft HCM Applications

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft HCM, you need to understand how the process works for PeopleSoft HCM applications other than PeopleSoft Human Resources.

To generate form letters for other PeopleSoft HCM applications:

1. Use the report writer to run SQRs.

   The SQRs search your PeopleSoft HCM database, retrieve data, and create data extract files containing one line of data for each letter.

2. Use Microsoft Word to run the macros that merge the data extract files into form letter templates, one for each type of letter.

   To generate form letters by using PeopleSoft Process Scheduler, PeopleSoft delivers two files (stdltr.dot and stdltr.95 located in the \PS\WINWORD directory on your application CD) containing the Word macros. You must use the file that is appropriate for your system.

   - The macros in stdltr.dot are for use with Word 97 (in Microsoft Office 97) and are written in Visual Basic.
   - The macros in stdltr.p5 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

     If you need to use stdltr.95, copy it to your system and rename it stdltr.dot.

3. Print the letters by using Microsoft Word.

   The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

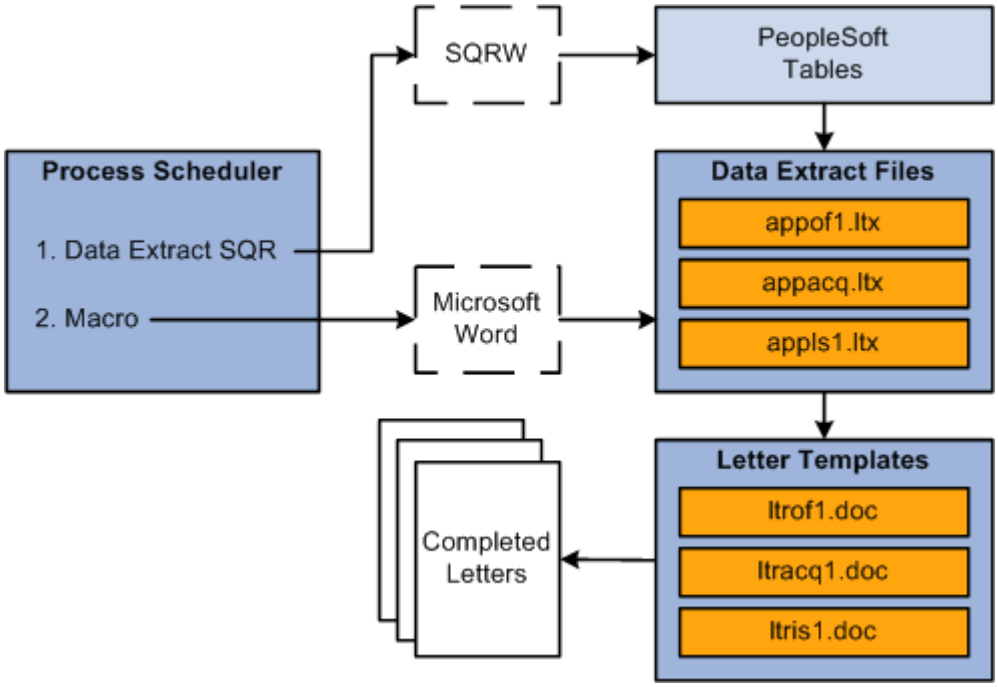
   The distributed architecture of your PeopleSoft HCM system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word print options.

Generating Form Letters with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler uses Microsoft Word to run the macros that merge the data extract files into form letter templates and prints the letters. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

This diagram and the steps below illustrate how PeopleSoft Process Scheduler generates form letters for other PeopleSoft HCM applications:

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PeopleSoft Process Scheduler follows these steps to generate form letters for other PeopleSoft HCM applications:

1. SQR PAWRL01:
    a. Scans the personal data record of each employee.
    b. Retrieves the information from the record.
    c. Creates data extract files pastdext.dat in the TEMP directory that is defined in the macro.
2. The macro PAWRL01:
    a. Opens the form letter templates that correspond to the data extract files.
    b. Merges the appropriate extract file data into the template rollover.doc.
    c. Inserts the data from pastdext.dat into the template field codes.

Using Naming Conventions in Form Letter Files

Microsoft Word assigns the extension .doc to all documents. No other naming convention is required for these types of letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

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The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word, you print them to your local printers.

To set up the system to print form letters:

1. Set up a shared directory on your machine for the letters.

   This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the C:\TEMP directory on your machine as TRNTEMP.

   For the multilingual letters, set up subdirectories for each language in which you run the letters. For example, if you run letters with the **Language** field set to *English,* you create the directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your empty.doc file and the location of your shared directory.

   In that macro, you replace this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT", "C:\HR800⇒
   \WINWORD", "ROLLOVER.DOC", ""
   ```

   With this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT",
   "C:\<path>⇒
   \WINWORD", "ROLLOVER.DOC", "\\<machine_name>\TRNTEMP"
   ```

   Where:

   <path> is the path to the directory that contains empty.doc.

   <machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See *PeopleTools: PeopleSoft Process Scheduler*.

Adapting Form Letters

These topics discuss how to:

- Modify the Word macros for the sample letters.
- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.

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Modifying the Word Macros for the Sample Letters

You specify several environment variables in each Microsoft Word macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you need to modify the PATH to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Microsoft Word documents and macros and the report writer SQRs and study them carefully.

> **Note**
>
> To make this change, you should be familiar with Microsoft Word templates and macros and with your report writer.

All of the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Microsoft Word file called empty.doc.

To modify a macro:

1. In Microsoft Word, open the empty.doc file.
2. Select **Tools**, and then **Macro.**
3. In the **Macros in** field, select *Stdltr* (template).
4. Highlight the macro that you want to modify and click **Edit.**

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft HCM contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are located in the directory \PS\WINWORD.
2. In Microsoft Word, open the document that you want to modify.

   If you see " "in the document, select **Tools**, and then **Options;** then select the **Field codes** check box.
3. Make changes to the text as you would in any other document, and save the file.

> **Warning**
>
> Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

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Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft HCM.

> **Note**
>
> To make this change, you should be familiar with Microsoft Word fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include currencies in the notification letter rollover.doc, add a Currency field code to the form letter template. Also add a variable for currency in pastdext.sqr so that the SQR retrieves the currency value and writes it to the data extract file.

   Here's what the data extract file looks like before the change:

   ```
   LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE


   USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993"
   ```

   Here's what it looks like after the change:

   ```
   LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE,Currency


   USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993","US Dollars"
   ```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters about their benefit plans to be signed by employees.

To create a new form letter:

1. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.
2. Create the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.
3. Create a new macro that is able to read the extracted data and merge it with the Word letter template.

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You might find it easier to copy an existing macro and adapt it.

> **Note**
>
> To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See *PeopleTools: PeopleSoft Process Scheduler*.

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(USF) Setting Up the Work-in-Progress Management System

Understanding WIP Management System Setup

PeopleSoft Human Resources provides a work-in-progress (WIP) management system that works together with Workflow to automate the tracking and processing of personnel action requests (PAR) and Federal eApps for Self Service.

These topics discuss:

- Delivered setup.
- Configuration steps.

Delivered Setup

Human Resources delivers definitions for the *USFED* WIP management transaction for personnel action requests (PAR) and definitions for these self service transactions:

- Employee self-service transactions:
  - Address Change (FE_ADDRESS)
  - Marital Status Change (FE_MARITAL
  - Name Change (FE_NAME)
- Manager Self Service transactions:
  - Full-Time / Part-time Status (FE_FTPT)
  - Location Change (FE_LOCATION)
  - Reporting Change (FE_REPORTING)
  - Promotion (FE_PROMOTION)
  - Reassignment (FE_REASSIGN)
  - Retirement (FE_RETIRE)
  - Separation (FE_SEPARATE)

WIP set up tables are delivered as system data. You can modify the delivered setup to suit your agency's WIP processing needs. Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in these topics is for your agency's system administrator who will perform the setup and is not for managers or system users.

> **Note**
>
> All discussions assume that you understand the processes that are being described.

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Related Topics

- PeopleSoft Human Resources Administer Workforce: Understanding the Administering PAR System
- PeopleSoft Human Resources Administer Workforce: Understanding PARs
- PeopleSoft eProfile: Understanding Transactions and Approvals
- PeopleSoft eProfile Manager Desktop: Understanding Self-Service Transactions and Approvals

Configuration Steps

These are the WIP system configuration steps:

1. Plan and design your WIP process.
2. Set up WIP status codes and associate them with status types and batch processes for reporting.
3. Set up WIP activities and component processing.

Designing Your Agency's WIP Process

Follow these steps to plan your WIP process setup:

1. Review the delivered sample USFED WIP system parameters as an example of WIP setup.

   See Understanding Delivered Sample WIP System Parameters.
2. Analyze your agency's review process and determine the levels of review that you need for PARs and recruiting processes.
3. Design your system based on your agency's requirements for routing requests and other data through approval processes.

   Use the charts of sample parameters presented in these topics as a starting point. You can use the charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes and Associating Status Types

To configure your WIP status controls:

- On the Transaction Setup page, define the WIP status codes that you want to use.

  Defining WIP status codes classifies the WIP process into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

  The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. When reviewers change the WIP status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency's review levels and keeps it going until it is completed as an actual event.
- Associate a status type with the status code.

  The status type tracks the requests and tells related processes when to add data rows.
- On the Batch Programs page, specify the WIP status and type for related processes.

  During processing, the identified process creates a new database row for the specified status type and enters the associated WIP status.

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Setting Up Activities and Component Processing

In the Approval Flow component, associate components with WIP activities and further specify the WIP status processing, workflow routing, and other component-level processing controls for each WIP activity.

Related Topics

- General Workflow Information
  Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

Understanding Delivered Sample WIP System Parameters

The tables in these topics contain the delivered USFED sample system WIP parameters for the PeopleSoft Human Resources Administer Workforce business process.

These topics discuss:

- Sample WIP status codes.
- Sample WIP status types and related status codes.
- Sample WIP parameters setup.

Sample WIP Status Codes

The USFED sample system is set up to display the WIP status code as the PAR status when entered on system pages.

This table lists and describes the WIP status codes and the users who assign them in the sample system.

WIP/PAR Status Code	WIP/PAR Status Description	Who Can Assign This Status
INI	Initiated	Employee, Supervisor, Human Resources
REQ	Requested	Employee, Supervisor, Human Resources
1ST	1st Authorized	1st Level Reviewer: Supervisor or Manager
2ND	2nd Authorized	1st Level Reviewer: Supervisor or Manager
SIG	Approved/Signed	2nd Level Reviewer: Supervisor or Manager
APP	Approved	Human Resources
AUT	Authorized	1st Level Reviewer: Supervisor or Manager
REV	Reviewed	2nd Level Reviewer: Supervisor or Manager
PRO	Processed by Human Resources	Human Resources
RET	Return for More Information	Supervisor, Manager, Human Resources

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WIP/PAR Status Code	WIP/PAR Status Description	Who Can Assign This Status
WTH	Withdrawn	Employee or Supervisor requesting the action
DIS	Disapproved	Supervisor, Manager, Human Resources
COR	Corrected	Human Resources
CAN	Canceled	Human Resources
IRR	IRR Reported (individual retirement record reported)	Human Resources

Related Topics

- PeopleSoft Human Resources Administer Workforce: Adding and Updating Data

Sample WIP Status Types and Related Status Codes

This table describes how the WIP status types are linked to the various WIP statuses in the sample USFED system:

Status Type	WIP Status Code
Work-in-progress	INI (initiated)
Work-in-progress	REQ (requested)
Work-in-progress	1ST (first authorization)
Work-in-progress	2ND (second authorization)
Work-in-progress	APP (approved)
Work-in-progress	AUT (authorized)
Work-in-progress	REV (reviewed)
Work-in-progress	SIG (approved/signed)
Work-in-progress	RET (returned for more information)
Work-in-progress	WTH (withdrawn)
Work-in-progress	DIS (disapproved)
Corrected	COR (corrected)
Canceled	CAN (canceled)
Completed	PRO (processed by Human Resources)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Sample WIP Parameters Setup

This table describes how the sample WIP parameters are set up in the Approval Flow component for USFED to drive Federal PAR component processing:

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WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
1st AUTH	1st Authorization		1ST	EE_1ST_AUTH	1ST, REQ	1ST, Request - Both Status Field Only
2nd AUTH	2nd Authorization		2ND	EE_2ND_AUTH	1ST, 2ND	1ST, 2ND - Both Status Field Only
APP/SGN	Approval/ Signature			EE_APPROVAL	2ND, SIG	2ND - Status Field Only; SIG
CANCEL	Cancellation	Insert		EE_CANCELLATION	CAN, PRO	COR, PRO - Both Status Field Only
CONC_HIR	Concurrent Hire		PRO	EE_CONC_HIRE		PRO, INI
CORRECTION	Correction	Insert, Delete	COR	EE_CORRECTION	COR, PRO	COR, PRO
EMPL REQST	Employee Request	Insert	REQ	EE_EMPL_REQ	1ST, 2ND, COR, DIS, PRO, INI, REQ, RET, SIG	INI, REQ
HIRE	Hire		PRO	EE_HIRE		PRO, INI, REQ
HR PROC	Process by HR	Insert, Delete	PRO	EE_HR_PROC	1ST, 2ND, CAN, COR, DIS, INI, PRO, REQ, RET, SIG, WTH	1ST, 2ND, CAN, COR, DIS, PRO, INI, REQ, RET, SIG, WTH
IRR CORR	Correction IRR	Insert	PRO	EE_IRR_CORR	IRR	PRO
IRR SUPP	Supplemental IRR	Insert	PRO	EE_IRR_SUPP	IRR	PRO
LEAVE REQ	Request Leave Without Pay		REQ	FG_EE_LEAVE_REQ		REQ
SUP REQST	Supervisor Request	Insert	REQ	EE_SUP_REQ	PRO, INI, REQ	INI, REQ
TERMINATN	Termination Request	Insert	REQ	FG_EE_TERMINATION		REQ
W3_PERS_DT	Web Personal Data		PRO	W3_GVT_PERS_DATA	PRO	PRO, REQ

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Setting Up WIP Status

To set up WIP status, use the Approval Transactions component (GVT_WIP_RECORD).

These topics discuss how to set up WIP status.

Pages Used to Set Up WIP Status

Page Name	Definition Name	Usage
Transaction Setup Page	GVT_WIP_RECORD1	Define WIP statuses and associate status types for the USFED or Federal eApps transactions.
Batch Programs Page	GVT_WIP_RECORD2	Specify WIP status and type for related batch processes. This page appears only for the USFED transaction.

Understanding WIP Status Codes and Status Types

After you review the sample setup, analyze the request process, and determine the process that your agency will use, define your WIP statuses and link each one to a status type.

You can use all or some of the statuses that are delivered with the system, and you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval.

Assign the appropriate WIP status type to each status. As a PAR travels along the path of approvals, it retains the status type *Work-in-progress* until it is approved, at which time the status type would be *Completed.*

This table lists the available WIP status types with definitions indicating when you would use each:

WIP Status Type	Definition
Work-in-progress	The request hasn't reached the final level of approval. The personnel action information resides only in the Federal PAR component and is not applied (pushed) to core records and components.
Completed	A request has successfully completed all review levels and is approved by HR. The personnel action will be applied (pushed) to core records and components.
Canceled	A completed request is canceled by HR. The personnel action will be retained on the Federal PAR components, but is deleted from core records and components.

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WIP Status Type	Definition
Corrected	A completed request is corrected by HR. The personnel action will be retained on the Federal PAR components, but is updated on core records and components.
IRR Reported	The request will be reported on an Individual Retirement Record (IRR).

Related Topics

- Sample WIP Status Codes
  The USFED sample system is set up to display the WIP status code as the PAR status when entered on system pages.
- Sample WIP Status Types and Related Status Codes
  This table describes how the WIP status types are linked to the various WIP statuses in the sample USFED system:
- Configuration Steps
  These are the WIP system configuration steps:

Transaction Setup Page

Use the Transaction Setup page (GVT_WIP_RECORD1) to define WIP statuses and associate status types for the USFED or Federal eApps transactions.

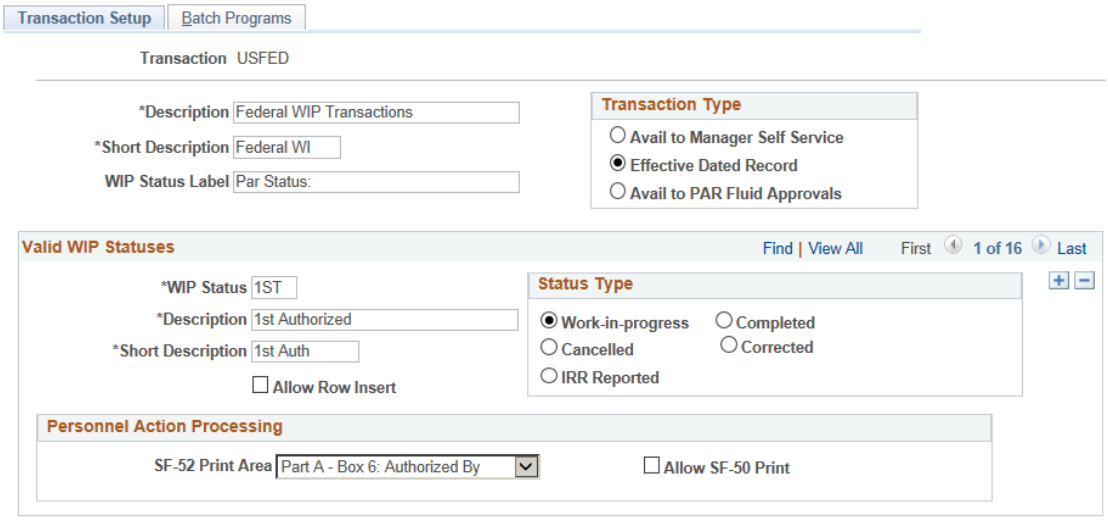
Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Approval Transaction setup**, and then **Transaction Setup**

Select *USFED* as the Transaction value in the search page.

Select any other value starting with *FE_* for Federal eApps for Self Service transactions.

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



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Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values in the USFED transaction to correspond to the setup that you require for your agency.

Field or Control	Description
WIP Status Label	Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is *Par Status* (personnel action request status).
Avail to Manager Self-Service (available to manager self-service)	Select this option only when setting up approvals for self-service transactions.
Effective Dated Record	Select if the record is to be effective-dated. This must be selected for the USFED transaction.
Avail to PAR Fluid Approvals	Select this option only when setting up approvals for PAR transactions in fluid.

Valid WIP Statuses

Field or Control	Description
WIP Status (work-in-progress status)	Add or modify the three-character status codes as necessary. Each WIP status represents a step in the approval process.
Description and **Short Description**	The system displays the description or short description on HCM pages when you select the three-character PAR Status that corresponds to the WIP status.
Allow Row Insert	Select this option if you want users to be allowed to insert a new row from a personnel transaction with the selected status. For example, the Data Control page in Administer Workforce enables users to enter new effective-dated rows and add new data, creating a history of the changes. These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row.
Status Type	Select the status type to be linked to the WIP status. Valid status types are: • **Work-in-progress.** • **Completed.** • **Canceled.** • **Corrected.** • **IRR Reported** (individual retirement record reported). These status codes are defined in the overview to this topic. See Understanding WIP Status Codes and Status Types.

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Personnel Action Processing

In this group box, enter details related to printing forms from a page with the selected status.

Field or Control	Description
SF-52 Print Area	Select the area where the name is to appear on the actual form; for example, *Part A - Box 6: Authorized By*.
Allow SF-50 Print	Select if you want the SF-50 button to be enabled. This allows the SF50 form to be printed for a personnel transaction with this status.

Reviewing all Data Rows

Continue reviewing and modifying data in the delivered data rows on the page. Add additional data rows if required.

Batch Programs Page

Use the Batch Programs page (GVT_WIP_RECORD2) to specify WIP status and type for related batch processes.

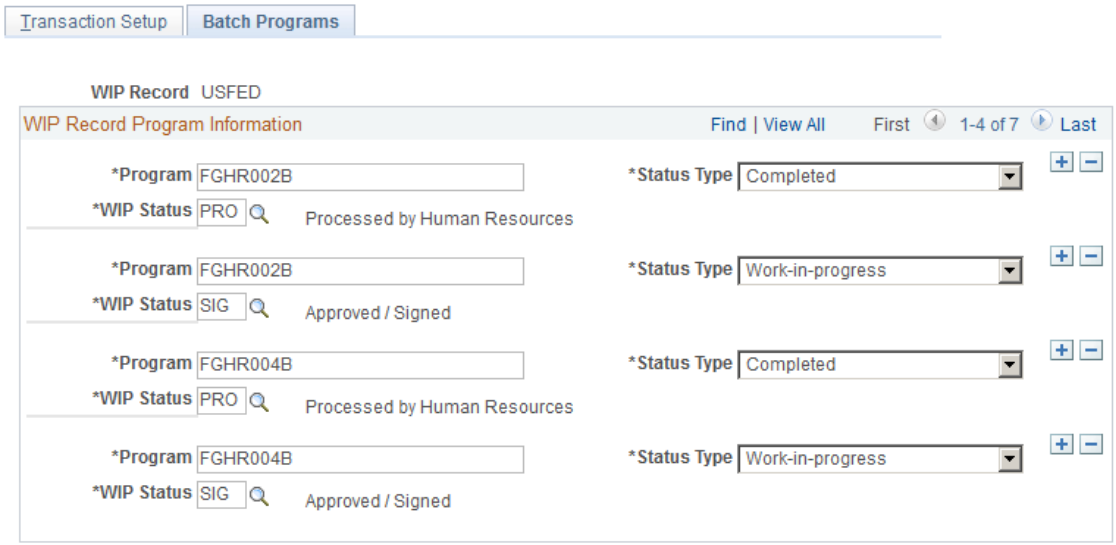
This page appears only for the USFED transaction.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Data USF**, and then **Approval Transaction setup**, and then **Batch Programs**

Select *USFED* as the Transaction value in the search page.

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



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Field or Control	Description
Program	Enter the name of the SQR, COBOL, or Application Engine process that inserts a new row. The row that the system inserts is the highest effective-dated row with the status type that is specified in the *Status Type* field on this page. Add rows as necessary to add programs.
Status Type	Specify the status type for which a new row is to be inserted by the program. Options are as follows: • *Completed:* The system searches for both *Completed* and *Corrected.* • *WIP:* The system searches for *Work-in-progress, Completed,* and *Corrected.*
WIP Status	Select the WIP status to be inserted on the new row.

Example

For example, based on the exhibit above, the *FGHR002B* process inserts the highest effective-dated row with the status type *Completed* and displays *PRO (Processed by Human Resources)* in the **WIP Status** field.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Understanding Automatic Action Processing

Defining WIP Activity Processing

To define WIP activity processing, use the Approval Flow Setup USF component (GVT_WIP_ACTVTY).

These topics discuss how to define WIP activity processing.

Pages Used to Define WIP Activity Processes

Page Name	Definition Name	Usage
WIP Activity 1 Page	GVT_WIP_ACTVTY1	Associate WIP activities with the components in which the action can be processed and specify other processing controls.
Component Defaults Page	GVT_WIP_PGRP_SEC	Select component defaults for action, reason, NOA, and legal authority.
WIP Activity 2 Page	GVT_WIP_ACTVTY2	Specify valid WIP status values, workflow routing, and PAR tracking for each combination of WIP activity and component.

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Page Name	Definition Name	Usage
WIP Activity 3 Page	GVT_WIP_ACTVTY3	Specify data entry availability for each combination of WIP activity and component.
Define Steps Page	GVT_WIP_ACTVTY4	Associate WIP statuses with steps in the approval process for federal self-service transactions. You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Workflow Engine (AWE) to define the approval process.

WIP Activity 1 Page

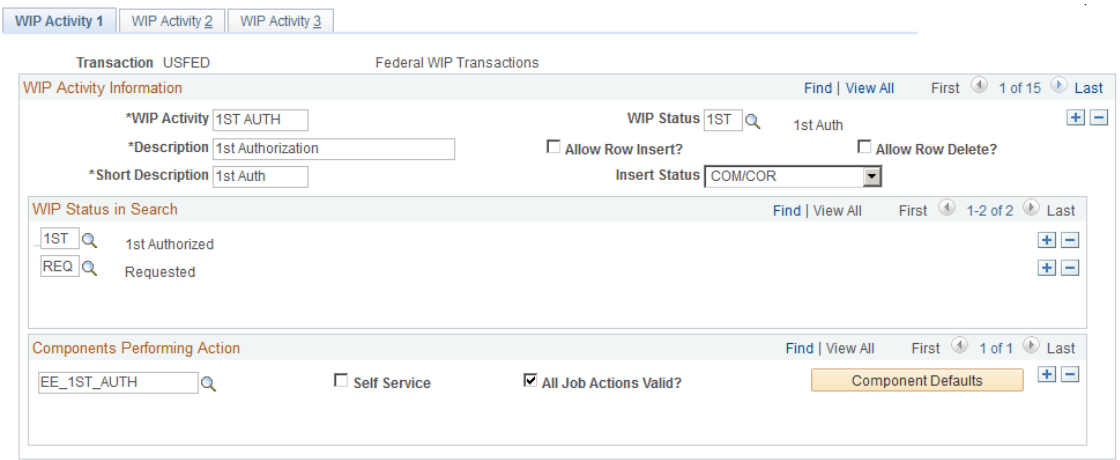
Use the WIP Activity 1 page (GVT_WIP_ACTVTY1) to associate WIP activities with the components in which the action can be processed and specify other processing controls.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Approval Flow Setup USF**

Select *USFED* as the **Transaction** value in the search page.

This example illustrates the fields and controls on the WIP Activity 1 page. You can find definitions for the fields and controls later on this page.



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WIP Activity Information

Field or Control	Description
WIP Activity	Enter the activity for which you are defining controls.
WIP Status	Select the default WIP status that appears on the respective component's Data Control page when you insert a new effective-dated transaction row, or when you are in Add mode.
Allow Row Insert?	For effective-dated records only. Select to permit users to insert rows using this WIP activity.
Allow Row Delete?	For effective-dated records only. Select to permit users to delete rows using this WIP activity.
Insert Status	Specify the status types from which row insert is permitted.

WIP Status in Search

Select the WIP status codes to include in search records. The search records for the components that are linked to this activity retrieve only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

Field or Control	Description
Self Service	Select if the component is a self-service component. When this option is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.
All Job Actions Valid?	Select if all job actions are valid for this component.
Component Defaults	Click this button to access the Component Defaults page, where you enter the valid job action, reason, NOA code, and legal authorities.

Component Defaults Page

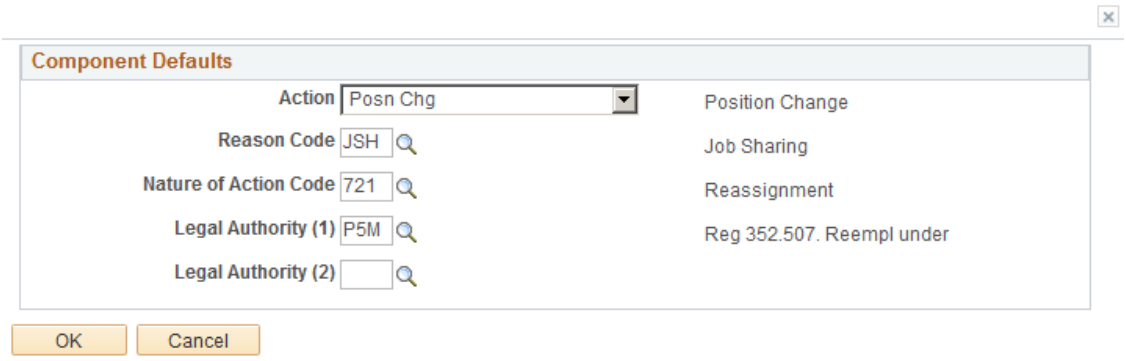
Use the Component Defaults page (GVT_WIP_PGRP_SEC) to select component defaults for action, reason, NOA, and legal authority.

Navigation:

Click the Component Defaults button on the WIP Activity 1 page for the *USFED* transaction.

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

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Select the values that the system enters by default in the component for this WIP activity.

WIP Activity 2 Page

Use the WIP Activity 2 page (GVT_WIP_ACTVTY2) to specify valid WIP status values, workflow routing, and PAR tracking for each combination of WIP activity and component.

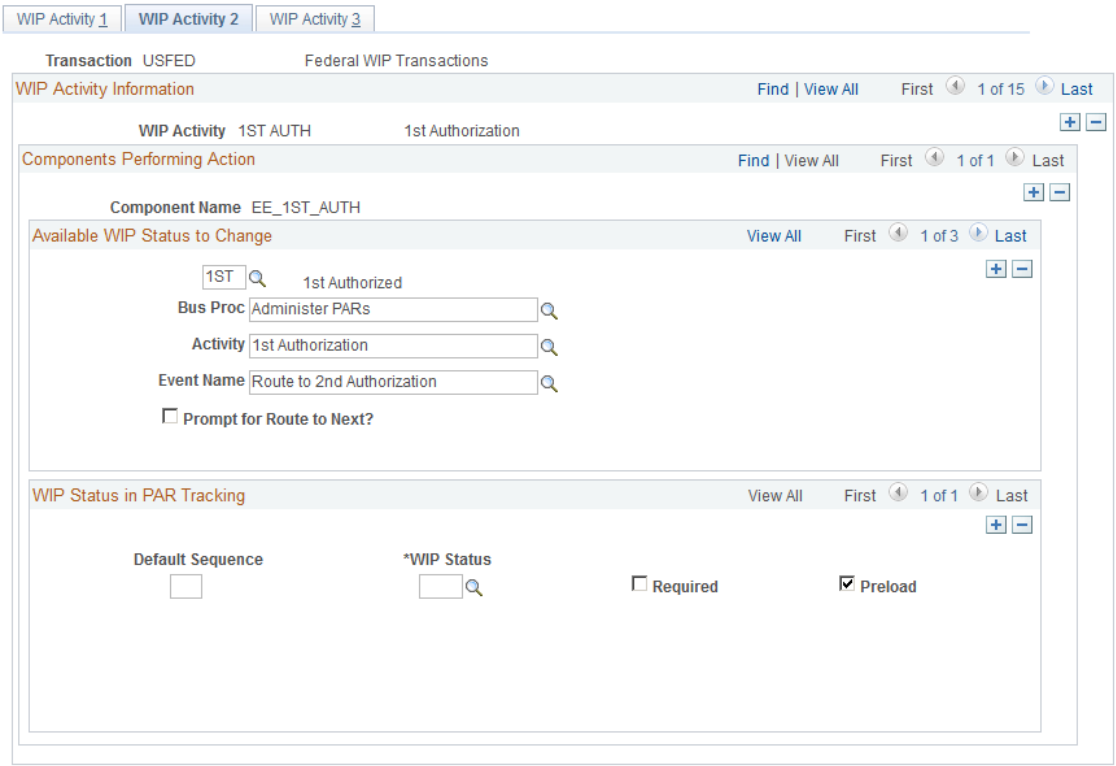
Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Approval Flow Setup USF**

Select *USFED* as the Transaction value in the search page.

Select the WIP Activity 2 page tab.

This example illustrates the fields and controls on the WIP Activity 2 page. You can find definitions for the fields and controls later on this page.



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Components Performing Action

This scroll area contains a row for each component listed for the WIP activity on the WIP Activity 1 page.

Available WIP Status to Change

The statuses that you specify in this group box are the only statuses available for selection in the WIP Status field on the PAR (personnel action request) pages in the component.

Field or Control	Description
Bus Proc (business process), **Activity,** and **Event Name**	The **Bus Proc, Activity,** and **Event Name** fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes. To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.
Prompt for Route to Next?	Select to specify the routing prompt list views that are to be used on the prompt page. When you select this option, the **Using** and **Routing Text fields appear,** where you enter the parameters for the routing process.
Using	A prompt page appears when the user saves the component if you have set up the activity with **Prompt for Route to Next?** selected for the component. On the prompt page, the user selects from the list of employees who are in the result set of the view that you select in the **Using** field on the WIP Activity 2 page. The user selects an employee from the results set to whom to route the request for the next level of approval.
Routing Text.	Specify the verbiage your users will see when prompted with the option of routing this personnel action.

WIP Status in PAR Tracking

Field or Control	Description
Default Sequence	Select the default sequence of a WIP status in PAR tracking.
WIP Status	Select the WIP status for the sequence you are defining.
Required	Select if the sequence is required.
Preload	Preload is the default sequence.

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WIP Activity 3 Page

Use the WIP Activity 3 page (GVT_WIP_ACTVTY3) to specify data entry availability for each combination of WIP activity and component.

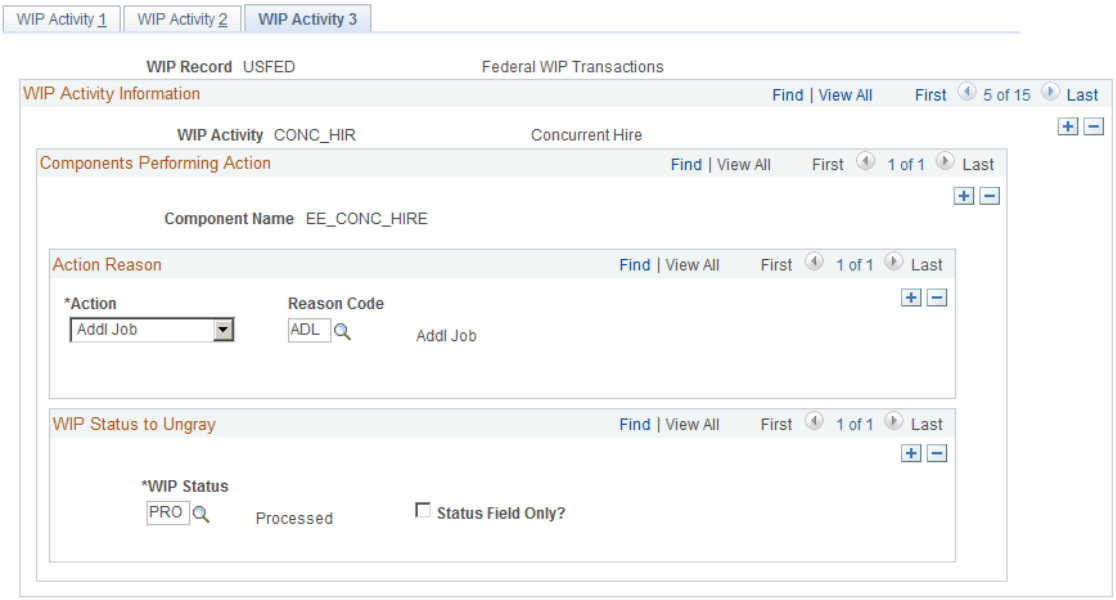
Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then **Approval Flow Setup USF**

Select *USFED* as the Transaction value in the search page.

Select the WIP Activity 3 page tab.

This example illustrates the fields and controls on the WIP Activity 3 page. You can find definitions for the fields and controls later on this page.



Action Reason

The **Action Reason group** box appears only if the **All Job Actions Valid?** option is deselected on the WIP Activity 1 page for the combination of activity and component. The **Action** and **Reason Code** values you select here control what values are available from the Action/Action Reason prompts when administering the PAR using the component and activity.

Field or Control	Description
Action	Enter the action for the selected activity and component.
Reason Code	Select a valid reason code for the selected activity and component. Only reason codes appropriate to the selected action are available.

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WIP Status to Ungray

All fields on the page are unavailable for data entry if the WIP status is not one of the values selected here for the activity the user is in.

Field or Control	Description
WIP Status	Select the WIP statuses that enable data input in the component.
Status Field Only?	Select if only the status field is available for entry. Use this option when a reviewer is allowed to change the WIP status but is not allowed to change the underlying data in the action.

Define Steps Page

Use the Define Steps page (GVT_WIP_ACTVTY4) to associate WIP statuses with steps in the approval process for federal self-service transactions.

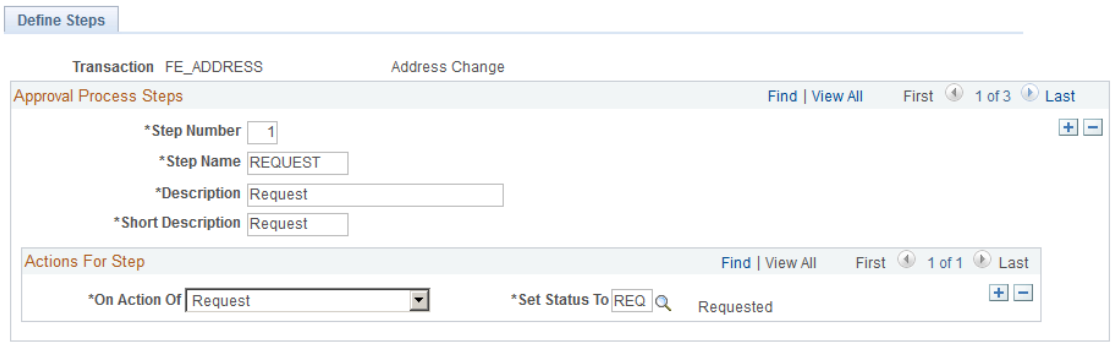
You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Workflow Engine (AWE) to define the approval process.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data USF**, and then , and then **Approval Flow Setup USF**

Select a transaction beginning with *FE* as the Transaction value in the search page.

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



When you search for transactions that begin with FE, the system accesses the Define Steps page rather than the WIP Activity pages for approval setup. *PeopleSoft eProfile* documents this page in detail.

Related Topics

- PeopleSoft eProfile: Define Steps Page
- PeopleSoft eProfile Manager Desktop: Understanding Self-Service Transactions and Approvals

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Setting Up PeopleSoft HelpDesk for HR – 360 View

Understanding PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR – 360° View provides a complete view of a person's HCM data. This PeopleSoft CRM application is set up and operated from CRM but extracts and displays data stored in PeopleSoft HCM.

As part of the PeopleSoft HelpDesk for HR setup, you must:

- Set up HCM security giving HelpDesk agents access to the data of the people they will be serving.
- Set up the direct report structure for the managers in your organization.

Related Topics

- Enterprise Components

Extracting and Displaying PeopleSoft HCM Information

PeopleSoft HelpDesk for HR extracts and displays the following information from PeopleSoft HCM:

- Personal
- Job
- Position summary
- Payroll summary
- Benefits summary
- Dependent and benefits
- Direct reports

You cannot modify the information from the HelpDesk pages.

Setting Up Security for PeopleSoft HelpDesk for HR

Data permission security for PeopleSoft HelpDesk for HR works the same way as it does for all of HCM. The HelpDesk agents using PeopleSoft HelpDesk for HR must be have access to data in order to view it on the 360 Degree View page.

Agent Levels and Permissions

There are three levels of HR HelpDesk Agents in the CRM database – Level 1, Level 2 and Level 3. Level 1 and Level 2 Agents cannot access certain HCM pages through the Action

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Links. Besides, the Level 1 Agent can only view the HCM pages but cannot make changes. The following table shows the pages that each agent can access in HCM database.

Action Links	Level 1 Agent	Level 2 Agent	Level 3 Agent
HCM – Personal Information	No	Yes	Yes
HCM – Emergency Contact	Yes	Yes	Yes
HCM – Job Summary	Yes	Yes	Yes
HCM – Job Data Information	Yes	Yes	Yes
Benefits – Benefits Summary	Yes	Yes	Yes
Benefits – Dependent Benefits	No	Yes	Yes
Benefits – Disability Plans	Yes	Yes	Yes
Benefits – Enroll In Benefits	No	Yes	Yes
Benefits – FSA Plans	Yes	Yes	Yes
Benefits – Health Plans	Yes	Yes	Yes
Benefits – Leave Plans	Yes	Yes	Yes
Benefits – Life/ADD Plans	Yes	Yes	Yes
Benefits – Pension Plans	Yes	Yes	Yes
Benefits – Retirement Plans	Yes	Yes	Yes
Benefits – Savings Plans	Yes	Yes	Yes
Benefits – Vacation Plans	Yes	Yes	Yes
Payroll – Direct Deposit – US	No	Yes	Yes
Payroll – Direct Deposit – USF	No	Yes	Yes
Payroll – General Deduct - US	No	No	Yes
Payroll – General Deduct – USF	No	No	Yes
Payroll – Paycheck – US	Yes	Yes	Yes
Payroll – Paycheck – USF	Yes	Yes	Yes
Payroll – Paysheet – US	No	No	Yes
Payroll – Paysheet – USF	No	No	Yes
Payroll – Savings Bond – US	Yes	Yes	Yes

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Action Links	Level 1 Agent	Level 2 Agent	Level 3 Agent
Payroll – Tax Data – US	No	No	Yes
Payroll – Tax Data – USF	No	No	Yes
Stock – Stock Activity	No	Yes	Yes
Stock – Stock Exercise	No	Yes	Yes
Training – Course Enrollment	No	Yes	Yes
Training – Training Summary	Yes	Yes	Yes

Related Topics

- Understanding PeopleSoft Security
  PeopleSoft security is based on permission lists and roles.
- Understanding Data Permission Security for HCM
  Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HCM, you can control access to the following types of data:

Setting Up Direct Reports for PeopleSoft HelpDesk for HR

To set up Direct Reports for PeopleSoft HelpDesk for HR, use the Direct Reports Setup component (SS_LINK_TBL).

PeopleSoft HelpDesk for HR can only retrieve the appropriate reporting structure for a person if you have set up the access type on the Direct Reports Setup page.

Page Used to Set Up Direct Reports for PeopleSoft HelpDesk for HR

Page Name	Definition Name	Usage
Target Information Page	SS_LINK_TBL	Set up the access type for the HD_360_COMPONENT.

Target Information Page

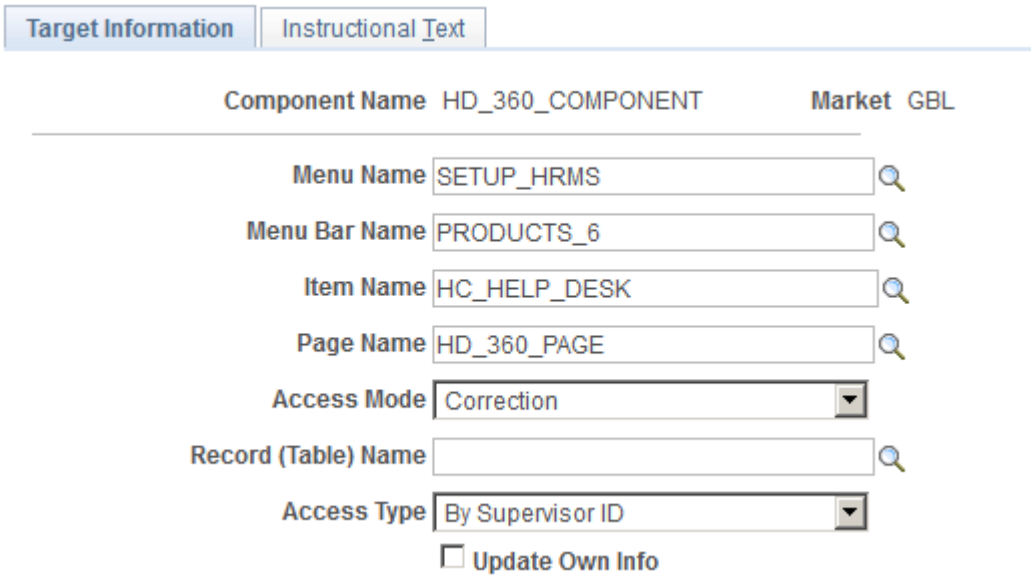
Use the Target Information page (SS_LINK_TBL) to set up the access type for the HD_360_COMPONENT.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Direct Reports Setup**, and then **Target Information**

This example illustrates the fields and controls on the Target Information page.

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To set up the access type:

1. Access the Direct Reports Setup component and select the component *HD_360_COMPONENT*.
2. On the Target Information page choose the **Access Type** *By Supervisor Id.*
3. Save the page.

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Setting Up and Working with Self-Service Transactions

Configuring Self-Service Transactions

Self-service transactions serve as extensions of a core PeopleSoft application. They enable workers to update their personal information or to perform some basic task required by their job.

> **Note**
>
> PeopleSoft delivers two different workflow technologies for self-service transactions. Delivered self-service transactions with workflow are preconfigured for either the Approval Framework or the technology described in these topics.

To configure self-service transactions, use the Self Service Workflow Configurations component (WF_CO_CONFIG).

These topics provide an overview of rules for self-service transactions and discuss how to configure self-service transactions.

> **Note**
>
> If the self-service transaction uses the Approval Framework for approval processing, you must also set up the transaction for use with that engine and its framework.

> **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 Enterprise Components: Understanding Notification Composer.

See Understanding Approvals.

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Related Topics

- Understanding Approvals
  Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.

Pages Used to Set Up Rules for Self Service Transactions

Page Name	Definition Name	Usage
Workflow Configurations Page	WF_CO_CONFIG	Determine whether transactions should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.
SS Component Interface Setup Page	SS_TRANS_CIDTL_SEC	Define the name of the component interface used by the transaction and location of error and warning messages.
Admin Notification Setup Page	WF_HR_TRANS_NOT	Define if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.

Understanding Rules for Self-Service Transactions

You can set rules that define whether the transaction:

- Goes through an approval process.
- Updates the database or sends a notice to the administrator to complete the transaction manually.
- Notifies a specific person when problems occur during the processing of the transaction or when a transaction successfully completes.

Which Transactions Can Be Configured

This table lists the configurable transactions and indicates the approval and delegation features that are delivered active for each:

Configurable Transaction Description	Approval Framework Delivered Active	Delegation Initiation Delivered Active	Delegation Approval Delivered Active
Performance Document	Yes (Approval Framework)		Yes (Approval Framework)
Address Change			
Change Full/Part Time Status		Yes	

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Configurable Transaction Description	Approval Framework Delivered Active	Delegation Initiation Delivered Active	Delegation Approval Delivered Active
Change Location		Yes	
Marital Status			
Name Change			
Promotion	Yes (Approval Framework)	Yes (Approval Framework)	Yes (Approval Framework)
Reporting Change	Yes (Approval Framework)		
Retire Employee		Yes	
Ad Hoc Salary Change	Yes		
Terminate Employee		Yes	
Training Enrollment			
Training Enrollment by Manager	Yes		
Transfer	Yes (Approval Framework)	Yes (Approval Framework)	Yes (Approval Framework)

You can change the delegation setting for any transaction on the Workflow Transactions page. For workflow that does not use the Approval Framework, you can enable transactions for delegation initiation, but not for delegation approval.

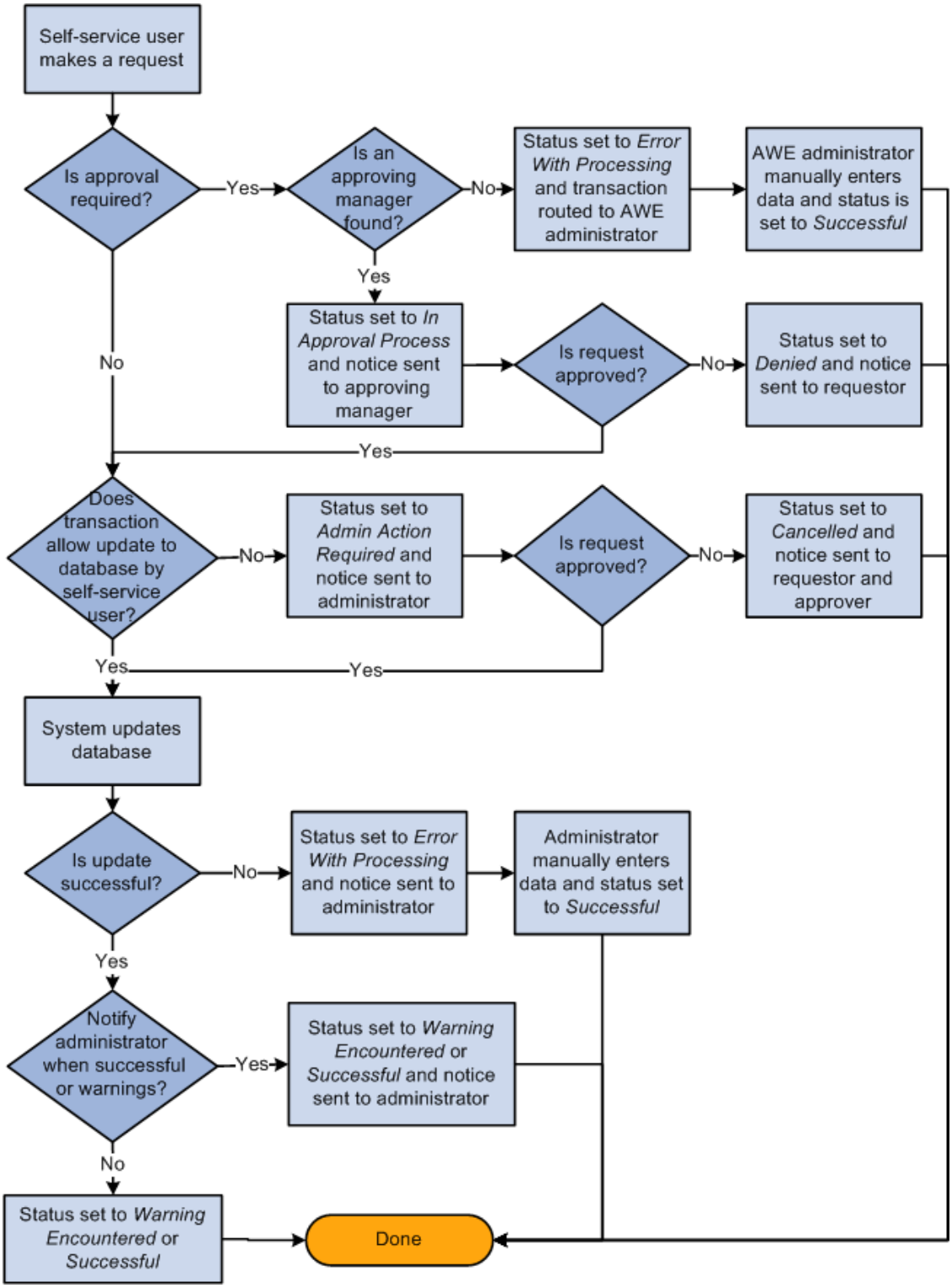
See Enterprise Components: Understanding Delegation.

Transactions that use the Approval Framework functionality and the delegation functionality require additional configuration. PeopleSoft delivers these transactions preconfigured for using these functionalities.

Overview of the Self-Service Processing

This diagram maps out the process a self-service transaction takes when the transaction is set up to follow the configuration rules:

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> **Note**
>
> If the transaction uses the Approval Framework and an appropriate user is not found, the system automatically routes the transaction to the Approval Framework (AWE) administrator for review and approval. If an appropriate user is not found for a transaction that does not use Approval Framework for workflow, the system sends an error notification to the administrator who can view the error using the Self-Service Inquiry page. In these cases, the administrator is required to manually enter data and set the status to *Successful.*
>
> If you enter an alternate user on the General Profile Information page, make sure the user ID entered has permission to access the necessary pages.

Exceptions to the Rules

Some transactions update the worker's job data. These self-service rules cannot override information controlled by Position Management.

Position Management Setting	Worker's Job	Auto-Update of Database
None	Not Applicable	Is allowed.
Partial	In a position	Not allowed. Exception to this rule is when a manager is requesting a reporting change for a worker. If the worker is in a position and an ID was entered in the Supervisor ID field automatic update is allowed. **Note:** If you select Partial Position Management on the Installation page, the system automatically updates position data if you also select the Position Override check box on the Workforce Administration - Job page. If you select Full Position Management on the Installation page the system automatically updates all position data.
Full	In a position	Not allowed. Exception to this rule is transferring and promoting a worker. This is because managers promote or transfer workers by selecting a new position number, not changing the existing one. So, automatic updates will insert the new position number and update all the related fields; position data is not touched.

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Related Topics

- Understanding Approvals
  Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.
- Enterprise Components: Understanding Delegation

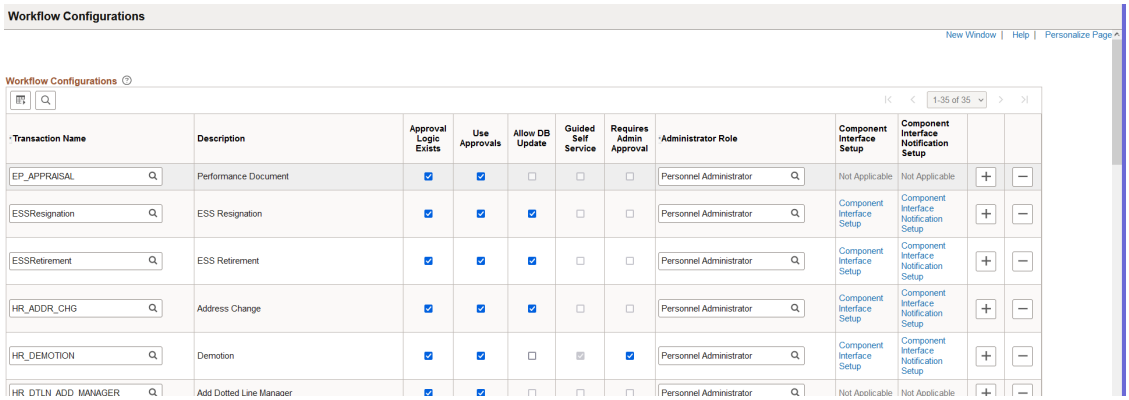
Workflow Configurations Page

Use the Workflow Configurations page (WF_CO_CONFIG) to determine whether transactions should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service**, and then **Workflow Configurations**, and then **Workflow Configurations**

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



> **Note**
>
> (USF) This page is not used for U.S. federal self-service transactions, which never update the HR tables directly. Instead, federal transactions go through intermediate Personnel Action Request (PAR) tables, where an HR administrator completes a final approval outside of the standard approval process.

Field or Control	Description
Transaction Name	Specifies the name of the transaction to define if it should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.

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Field or Control	Description
Description	Lists the self-service transaction delivered with the system that is designed to work with the Process Configuration process.
Approval Logic Exists	If selected, this check box indicates that an approval process has been configured in AWE for this transaction.
Use Approvals	This check box is only available to those transactions designed to use an approval process. If selected, the system requires Manager level approval. If not selected, manager level approval is not required. **Note:** Transactions that use the Approval Framework require additional approval configuration. See Understanding Approvals.
Allow DB Update (allow database updates)	If selected, this check box allows the transaction to update the database. If not selected, an administrator will be notified of the change and need to complete the process request. Administrators can complete the request on the Workflow Inquiry page or in the Self-Service transaction pages.
Guided Self Service	Select to indicate that the corresponding transaction is for Guided Self Service (GSS). Deselect if it is not used for GSS.
Requires Admin Approval	This column is enabled only for GSS transactions and when Notification composer is turned on. Select for GSS transactions to use a second level administrator approval when Notification Composer is turned on.
Administrator Role	Identifies the role of the person who is responsible for reviewing the results of the transaction if errors occur. If Notify on Success or Notify on Warnings is selected on the Admin Notification Setup page, this role receives notifications when processing is successful or warnings are encountered.
Component Interface Setup	Click this link to access the SS Component Interface Setup Page.
Component Interface Notification Setup	Click this link to access the Admin Notification Setup Page.

For more information, see the product documentation for *PeopleTools: Security Administration*.

SS Component Interface Setup Page

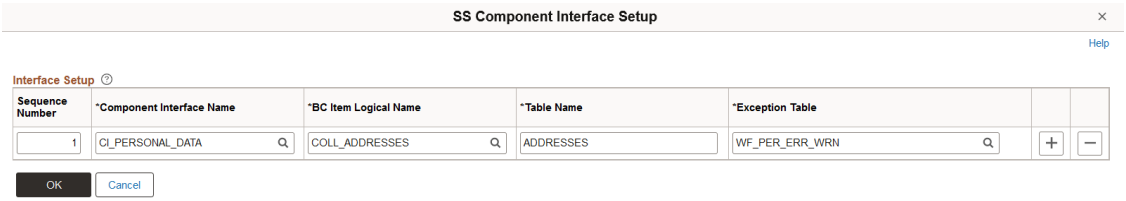
Use the SS Component Interface Setup page (SS_TRANS_CIDTL_SEC) to define the name of the component interface used by the transaction and location of error and warning messages.

Navigation:

Click the **Component Interface Setup** link on the Workflow Configurations page.

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



> **Note**
>
> You do not need to modify this page unless you use component interfaces or exception tables that you have created or modified. This is predefined system data that can be changed if you want to use a different component interface.

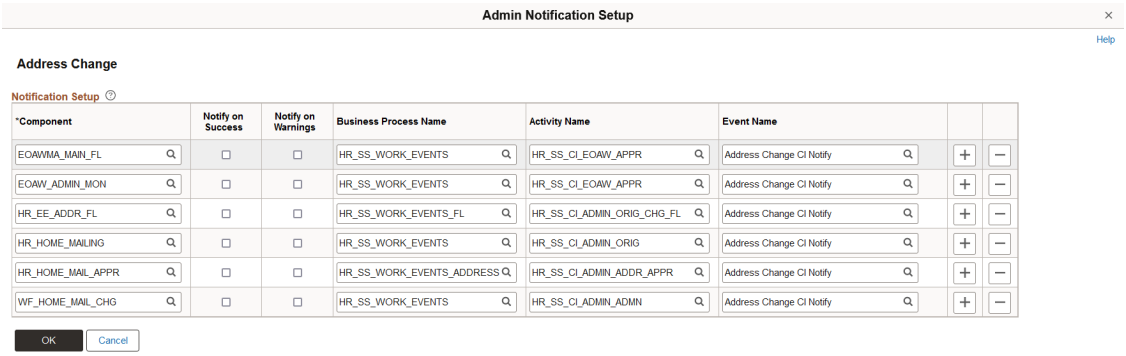
Admin Notification Setup Page

Use the Admin Notification Setup page (WF_HR_TRANS_NOT) to define if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.

Navigation:

Click the **Component Interface Notification Setup** link on the Workflow Configurations page.

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



Field or Control	Description
Component	The name of the transaction.
Notify on Success	Applicable only if Allow DB Update is selected on the Workflow Configuration page. Select to have the role selected on the Workflow Configuration page receive an email when automatic updates are successful.

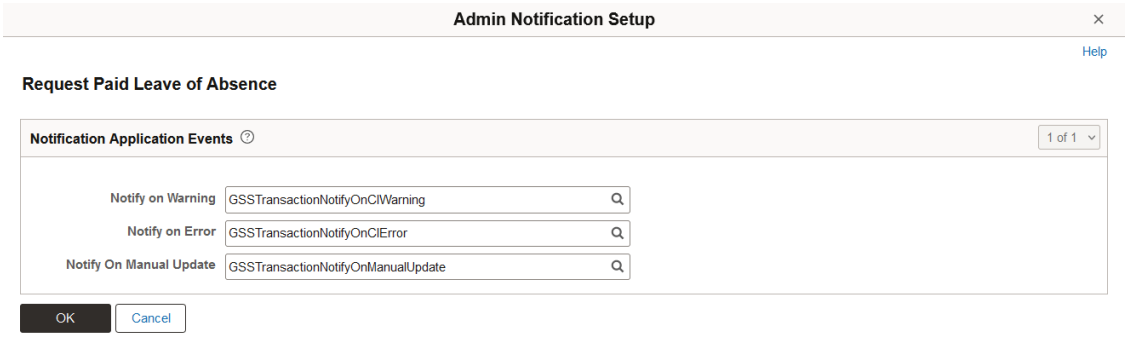
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Field or Control	Description
Notify on Warnings	Select to have the role selected on the Workflow Configuration page receive an email when warning messages are generated during a successful HR database update.
Business Process Name, Activity Name, and **Event Name**	This is predefined system data that can be changed if you want to use a different business process.

Notification Application Events

The page displays this section when working with a Guided Self Service transaction and Notification Composer is on.

This example illustrates the fields and controls on the Admin Notification Setup page for a Guided Self Service transaction. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Notify on Warning	Enter the notification event ID the system will use when CI warnings occur during the approval of the administrator approval step.
Notify on Error	Enter the notification event ID the system will use when CI errors occur during the approval of the administrator approval step.
Notify on Manual Update	Enter the notification event ID the system will use when the administrator performs a manual update for a transaction request.

Reviewing Transactions

This section discusses how to review transaction activity.

> **Note**
>
> Use the Approval Monitor to review transactions that use the Approval Framework.

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Page Used to Review Transactions

Page Name	Definition Name	Usage
Workflow Inquiry Page	WF_SS_STAGED	Review activity for self-service transactions that do not use the Approval Framework.

Related Topics

- Administering Approvals
  The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

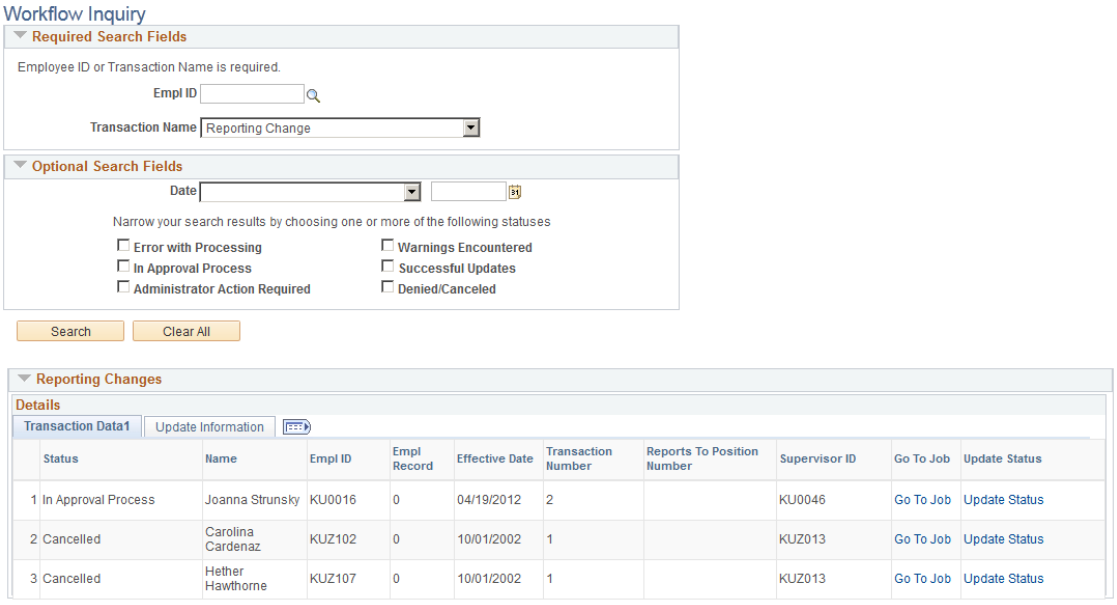
Workflow Inquiry Page

Use the Workflow Inquiry page (WF_SS_STAGED) to review activity for self-service transactions that do not use the Approval Framework.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Workflow Inquiry**, and then **Workflow Inquiry**

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



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Field or Control	Description
Required Search Fields	To see the activity for a specific worker enter the ID in the **Empl ID** field. Make sure to tab out of the field. To see the transaction activity, select the transaction name in the **Transaction Name** field.
Optional Search Field	To see the activity for transaction that occurred on a specific date, enter the date in the **Date** field. To select activity with a specific status, select the check box next to the name of the status. You can select one or more statuses.
Search	Click this button to find transactions that match the search criteria. Results display below the **Search** button.
Clear All	Click this button to clear all search criteria or search results on the page and start a new inquiry.

Search Results

Information about the transaction appears below the search area. Click the various tabs to display information relevant to the transaction:

- Click the **Errors** or **Warnings** links to display error and warning messages.
- Click the **Go To** link to display the component page relevant to the transaction.
- Click the **Update Status** link to view or update the status.

(USF) Reviewing Federal Self-Service Transactions

This topic provides an overview of federal self-service transactions and discusses how to review federal self service transactions.

> **Note**
>
> The Approval Workflow Engine (AWE) provides its own approval monitor that you can use to review and, if necessary, perform certain administrative actions for approval transactions. The pages described in this topic provide additional administrative capabilities, including the option to review transactions that predate the use of AWE processing for federal self-service transactions.

Pages Used to Review Federal Self-Service Transactions

Page Name	Definition Name	Usage
Workflow Inquiry (USF) Page	FE_SS_STAGED	Review activity for self-service transactions that do not use the Approval Framework.

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Page Name	Definition Name	Usage
<Transaction Name> Page	<Various>	Review detailed transaction information, and take administrative action for certain transactions.

Related Topics

- Administering Approvals
  The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

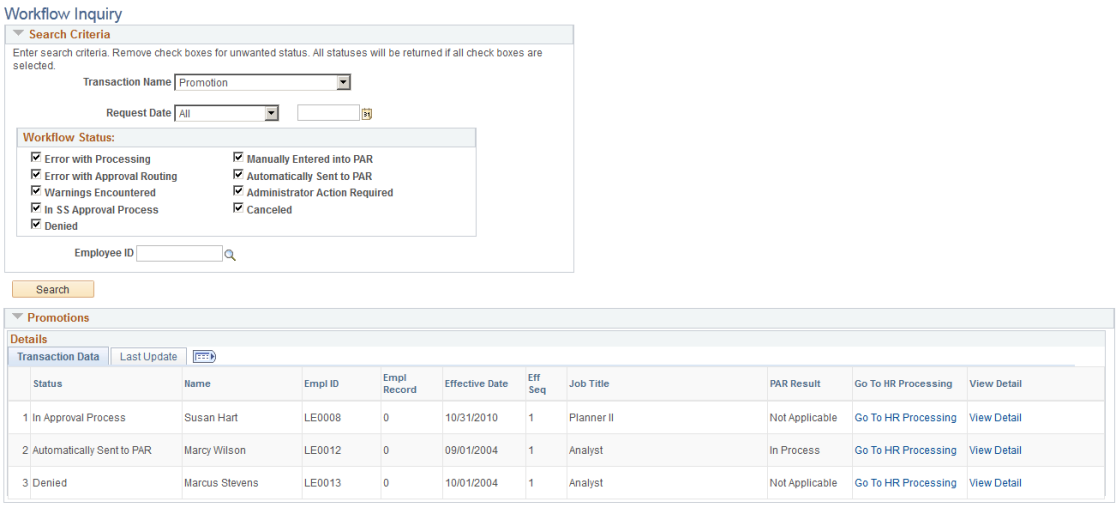
Workflow Inquiry (USF) Page

Use the Workflow Inquiry (USF) page (FE_SS_STAGED) to review activity for self-service transactions that do not use the Approval Framework.

Navigation:

Workforce Administration, and then **Self Service Transactions**, and then **Workflow Inquiry (USF)**, and then **Workflow Inquiry**

This example illustrates the fields and controls on the Workflow Inquiry (USF) page. You can find definitions for the fields and controls later on this page.



Search Criteria

Field or Control	Description
Transaction Name, Request Date, and **Employee ID**	To see the activity for a specific transaction type, request date, or employee, enter the appropriate search criteria in these fields.

Workflow Status

To get search results, you must select at least on of these check boxes; only transactions with selected statuses are included your search results.

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Field or Control	Description
Error With Processing	An approved AWE transaction encountered an error with the component interface that pushes the transaction data to the U.S. federal PAR tables. See PeopleSoft Human Resources Administer Workforce: Understanding the Administering PAR System.
Error With Approval Routing	An AWE transaction encountered a routing error. To review and address the error, you must use the AWE approval monitor (the Monitor Approvals page).
Warnings Encountered	The transaction generated warnings.
In SS Approval Process (in self-service approval process)	The transaction is currently awaiting approval.
Denied	Transaction approval was denied.
Manually Entered into PAR	The transaction was approved and an administrator manually entered the transaction into the PAR tables. This occurs for the full-time/part-time change, location change, and reporting change transactions. These transactions cannot be automatically pushed to the PAR system because they are position-controlled: changes are made to the position and then propagated out to the persons in the positions
Automatically sent to PAR	The transaction was approved and the system automatically pushed the data into the PAR tables using a component interface.
Administrator Action Required	A transaction requires an administrator to make a decision in order to continue.
Cancelled	The transaction was cancelled.

Search

Field or Control	Description
Search	Click this button to access a list of self-service approval transactions that meet the specified criteria.

Search Results

Search results are grouped into transaction-specific grids. The grids display basic transaction information such as the employee name and ID and the date of the transaction. The grids also display the following approval processing columns:

Field or Control	Description
Status	Displays the status of the transaction. The statuses are the same as the status check boxes in the Search Criteria group box.

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Field or Control	Description
PAR Result	Indicates whether the transaction has been sent to the PAR tables. • *Not Applicable:* The transaction is still in the approval process and, until it is approved, it cannot be sent to the PAR tables. This value is used only for transactions that are normally sent to the PAR tables automatically. • *Not Available:* The transaction cannot be automatically sent to the PAR tables. This value is used for the three position-based transactions that require a user to manually enter data into the PAR tables: location change, reporting change, and full time/part time change. • *In Process:* The transaction has been sent to the PAR tables and is awaiting HR action. • *Complete:* The transaction has been sent to the PAR tables, and HR personnel have finalized the transaction. • *Denied:* The transaction was sent to the PAR tables, and HR personnel have denied PAR approval.
Go to HR Processing	Click this link to access the HR Processing USF component where the HR Personnelist reviews and finalizes the approved transaction.
View Detail	Click this link to access a detail page that displays more information about the transaction, including: • The specific data change that the user requested (for example, the previous and new marital status). • Information about the approval process, including the status of each approval step.

<Transaction Name> Page

Use the <Transaction Name> page to review detailed transaction information, and take administrative action for certain transactions.

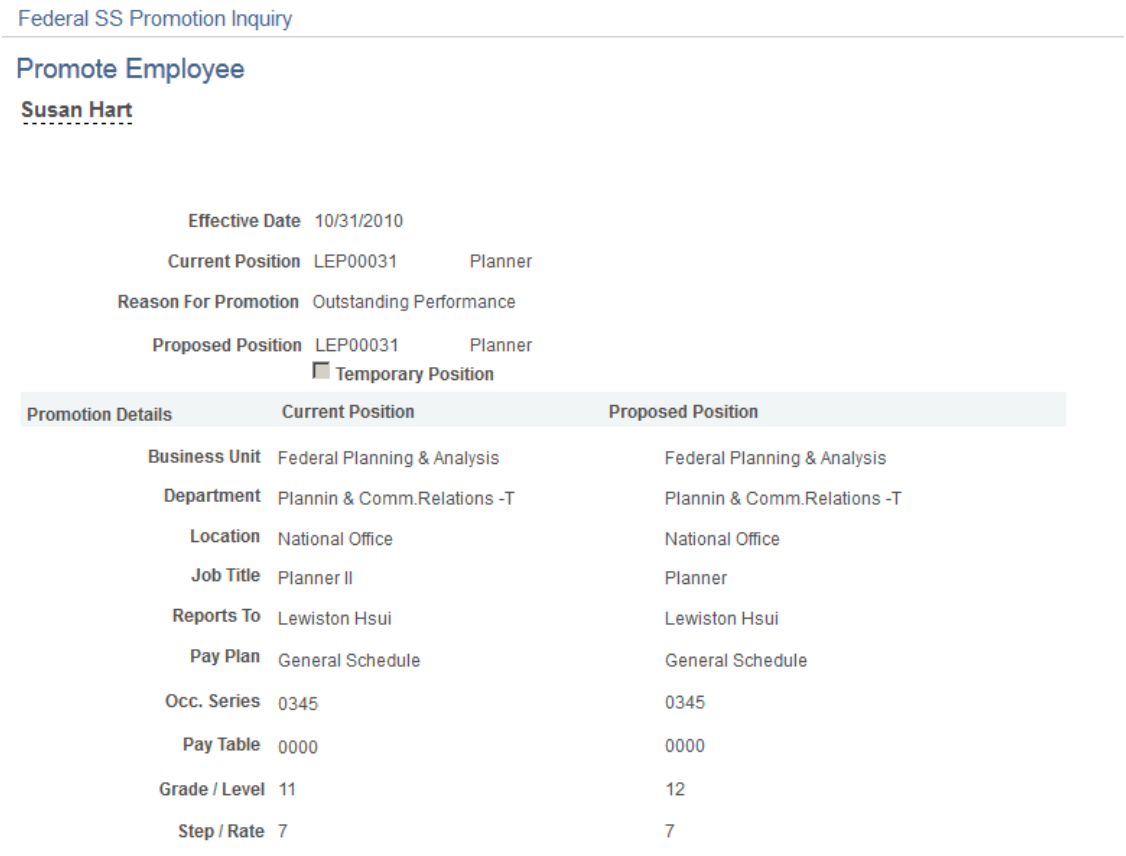
Navigation:

Click the **View Detail** link for a transaction on the Workflow Inquiry (USF) page.

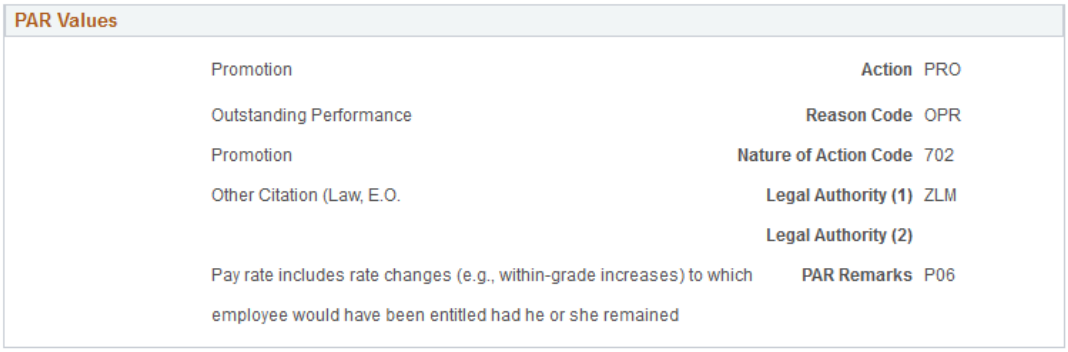
> **Note**
>
> The page name and certain field vary depending on the transaction type.

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

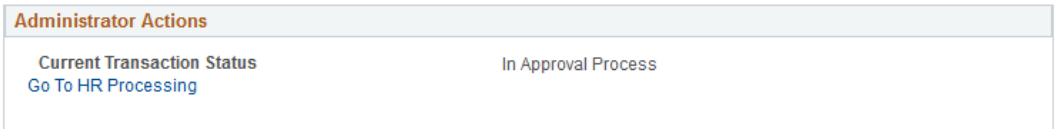
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This example illustrates the fields and controls on the <Transaction Detail> page (2 of 2). You can find definitions for the fields and controls later on this page.







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At the top of the page, you can see the previous and new values for the requested data change. The specific fields that appear depend on the type of transaction.

PAR Values

This group box displays data that will be written to the PAR tables for this transaction. This data is not provided by the self-service user; instead, you use the Defaults/Admin setup page to provide transaction-specific default values for each field.

See PeopleSoft eProfile: Defining PAR Tracking Data.

Approval Details for AWE Transactions

When transaction approvals are processed using AWE, the transaction details page includes a graphical representation of the approval flow.

The approval chain diagram includes a box for each approver. The box title shows the approver's status, while the box contents include the approver's name, the approver's role in the approval process (for example, First Authorizer), and the date, if any, when the approver took action on the approval request

Approval Details for Non-AWE Transactions

When the transaction predates the use of AWE to manage approvals for federal self-service transactions, the approval steps appear in a grid rather than as a graphical representation of the approval flow.

This grid lists each approver by role and by name and displays the action (if any) taken by the approver, the date the action was taken, and any comments entered by the approver at the time the action was taken.

PAR Result

Field or Control	Description
PAR Result (Personnel Action Request Result)	Displays a message that corresponds to the PAR Result field on the Workflow Inquiry (USF) summary page.

Administrator Actions

Field or Control	Description
Current Transaction Status	Displays a message that corresponds to the Status field on the Workflow Inquiry (USF) summary page.
Select this option as the request cannot be completed using Self-Service. You will be required to manually enter the request into PAR	This check box and the **Save** button appear only if the current transaction status is *Error with CI.* Select the check box to acknowledge that you know you must manually enter the request into PAR, then click the Save button.

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Field or Control	Description
Go to HR Processing	Click this link to access the HR Processing USF component where the HR Personnelist reviews and finalizes the approved transaction (and where you manually enter the transaction data if necessary). This link is not available if the current transaction status is *Error With Approval Routing* because such errors must be addressed in the AWE approval monitor (the Monitor Approval page).

Setting Up Access to Direct Reports Data

To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

These topics discuss how to set up access to direct reports data.

> **Note**
>
> If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" topics.

See Configuring Direct Reports Functionality.

Pages Used to Set Up Direct Reports

Page Name	Definition Name	Usage
Target Information Page	SS_LINK_TBL	Set up worker data access for the Manager self-service option.
Instructional Text Page	SS_LINK_TBL2	Add instructional messages to the Select Employee page (OPRROWS) for this transaction component.service.
Direct Reports Configuration Page	HR_DR_UI_CFG_1	Select the ePerformance or eProfile transaction that you want to configure for direct reports or user interface behavior.
Direct Reports Transaction Configuration Page	HR_DR_UI_CFG_2	Configure direct reports or user interface behavior for ePerformance or eProfile self-service transactions.

Determining Access to Manager Self-Service

The system determines who can access the manager self-service components and data by determining the answers to these questions:

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- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the manager self-service components when you define their component access on the Permission List page. In the Direct Reports Setup component, you specify whose data a user can see for a particular manager self-service transaction.

The system determines what kind of reporting relationship exists between managers and their staff. Reporting relationships are determined on two pages: the Work Location page (JOB_DATA1) and the Department Profile page (DEPARTMENT_TBL_GBL). On the Work Location page, you indicate who a worker's manager is. On the Department Profile page, you indicate who manages a department and the staff who report to that department.

> **Note**
>
> This section does not apply to the manager role in PeopleSoft Talent Acquisition Manager.

Related Topics

- Setting Up Primary Permission List Preferences
  To set up primary permission list preferences, use the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).
- PeopleSoft Human Resources Administer Workforce: Work Location Page
- Department Profile Page
  Use the Department Profile page (DEPARTMENT_TBL_GBL) to define basic information about a department.

Target Information Page

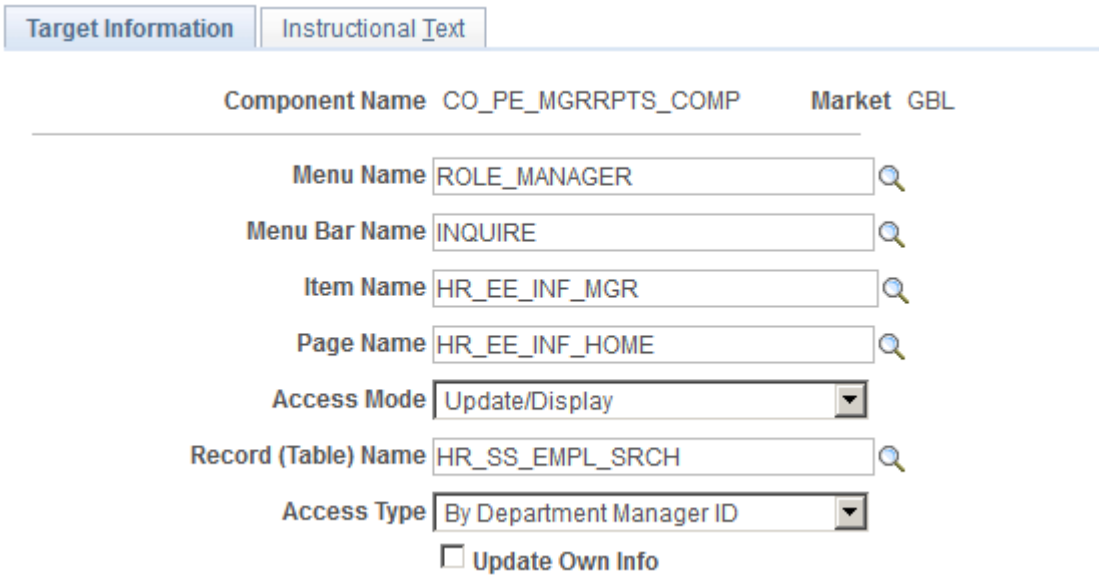
Use the Target Information page (SS_LINK_TBL) to set up worker data access for the Manager self-service option.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Direct Reports Setup**, and then **Target Information**

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

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> **Note**
>
> If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" topics.

See Configuring Direct Reports Functionality.

> **Note**
>
> To determine technical names of the system objects, use PeopleSoft Application Designer.

Field or Control	Description
Component Name	Enter the component name as defined on the menu in PeopleSoft Application Designer. The component name is the name of the Select Employee page that the system displays when the user selects a Manager self-service transaction. It isn't the name of the transaction component.
Menu Name	Select *ROLE_MANAGER*. All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.
Menu Bar Name	Select the name of the menu bar that the transaction component is under.

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Field or Control	Description
Item Name	Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page. The transaction component contains pages that the manager uses to view or manipulate staff data.
Page Name	Enter the object name of the transaction component's page. The object name for each Manager self-service transaction is listed in the introduction table of the page discussion. If a transaction component has more than one page, enter the name of the transaction page that the system displays first (usually the first page in the component) when a user selects a person name.
Access Mode	Select which action the user performs in the transaction. Options are *Add, Update/Display, Update/Display All,* and *Correction.*
Record (Table) Name	Enter the object name of the record that makes up the page of the transaction component.

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Field or Control	Description
Access Type	This field defines the reporting relationship used by the Select Employee page for this transaction component. Available options are: • *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the workers who are in the user's department. • *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on 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 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 information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position. • *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.
Update Own Info (update own information)	Not applicable to self service. Select to allow managers to update their own information in this transaction component.

See *PeopleTools: Applications User's Guide*.

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Related Topics

- Creating and Modifying Security Trees
  You can create a security tree automatically or manually.

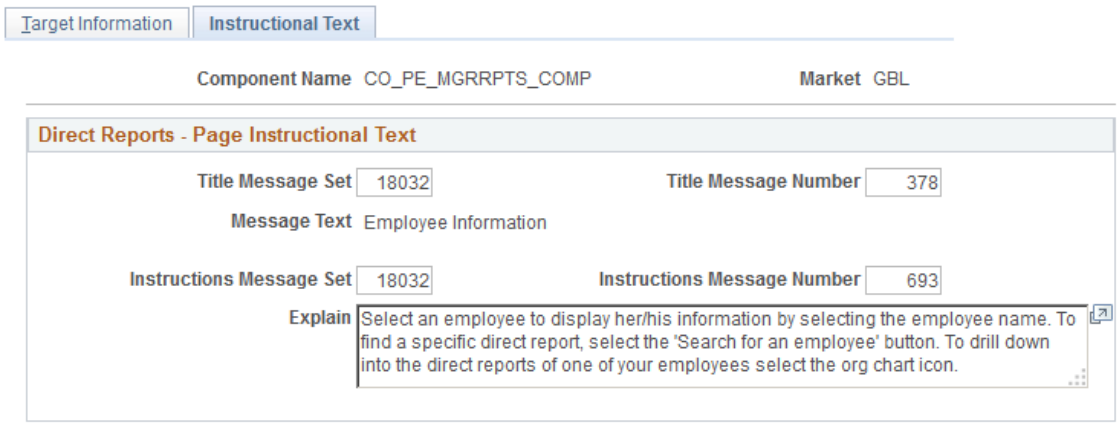
Instructional Text Page

Use the Instructional Text page (SS_LINK_TBL2) to add instructional messages to the Select Employee page (OPRROWS) for this transaction component.service.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Direct Reports Setup**, and then **Instructional Text**

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



Direct Reports - Page Instructional Text

Field or Control	Description
Title Message Set and **Title Message Number**	Enter the title message set and number of the transaction instructions title that the system displays on this component's Select Employees page.
Message Text	Displays the text of the transaction instruction title that is associated with the **Title Message Number.** The system displays this text on this component's Select Employees page.
Instructions Message Set and **Instructions Message Number**	Enter the number of the instructions message set and number for the instruction message that the system displays on this component's Select Employees page.
Explain	Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page. Tells the user how to select the employees whose data they want to view or manipulate.

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Using Workflow with Self-Service Transactions

To use workflow with self-service transactions, use the Set Workflow Defaults component (WF_SYSTEM_DEFAULTS), Workflow Transaction Category component (EO_TRAN_CATS), Workflow Transactions component (EO_TRANSACTIONS), System Workflow Rules component (EO_SYS_WF_RULES), Workflow Status component (HR_WF_STATUS), and Workflow User Preferences component (HR_SS_WF_EE_PREF).

These topics discuss how to use workflow with self-service transactions.

> **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 Enterprise Components: Understanding Notification Composer.

Pages Used to Activate Workflow

Page Name	Definition Name	Usage
Worklist System Defaults Page	WF_SYS_DEFAULTS	Set default parameters for workflow messages.
Workflow Transaction Categories Page	EO_TRAN_CATS	Define the category for self-service transactions. Generally, all self-service transactions are assigned to HR_TRANSACTIONS. This data is supplied by PeopleSoft and it is recommended that you not change this information.

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Page Name	Definition Name	Usage
Workflow Transactions Page	EO_TRANSACTIONS	Register self-service transactions as workflow transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that do not use the Approval Framework, the a category is supplied by PeopleSoft and we recommend that you not change this information. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.
System Workflow Rules Page	EO_SYS_WF_RULES	Set the rules for workflow notification for every set ID where you plan to use workflow.
Workflow Status Page	HR_WF_STATUS	Specify what workflow is triggered for each self-service transaction. Changes to the approval path can be made, but is not recommended.
Workflow User Preferences Page	HR_SS_WF_EE_PREF	Set up a user's notification method for workflow messages.

See *PeopleTools: Workflow Technology*.

Worklist System Defaults Page

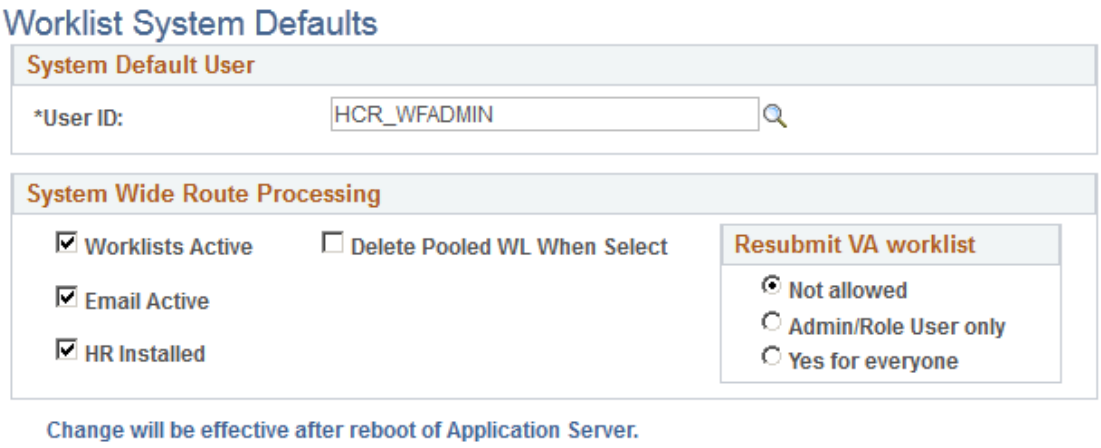
Use the Worklist System Defaults page (WF_SYS_DEFAULTS) to set default parameters for workflow messages.

Navigation:

PeopleTools, and then **Workflow**, and then **Defaults & Messages**, and then **Set Workflow Defaults**, and then **Worklist System Defaults**

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

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Make sure the **Worklist Active, Email Active,** and **HR Installed** check boxes are selected.

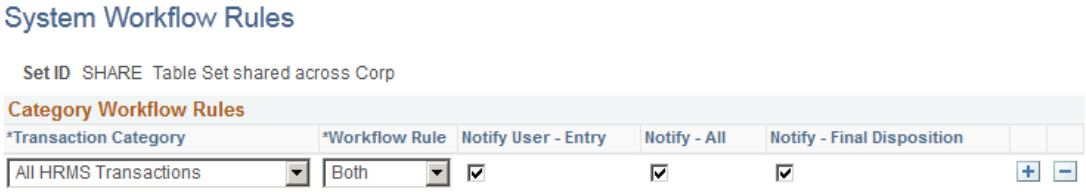
System Workflow Rules Page

Use the System Workflow Rules page (EO_SYS_WF_RULES) to set the rules for workflow notification for every set ID where you plan to use workflow.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self Service**, and then **System Workflow Rules**, and then **System Workflow Rules**

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



For different rules to exist for different business units, specify these rules at the SetID level.

> **Note**
>
> You must specify this information when you implement PeopleSoft HCM.

Field or Control	Description
Transaction Category	Select a transaction category.

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Field or Control	Description
Workflow Rule	Define how the system notifies users when they're required to perform a function. Values include: • *Email:* Notify the user through email. • *Worklist:* Notify the user by placing an entry in the user's worklist. • *Both:* Notify the user by both email and worklist. • *None:* No notification. • *User:* Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.
Notify User - Entry	Select if users are to receive confirmation when initiating transactions.
Notify All	Select if users are to be notified each time someone processes one of their transactions.
Notify - Final disposition	Select if users are to be notified when the final disposition has been made for the request.

Related Topics

- General Workflow Information
  Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

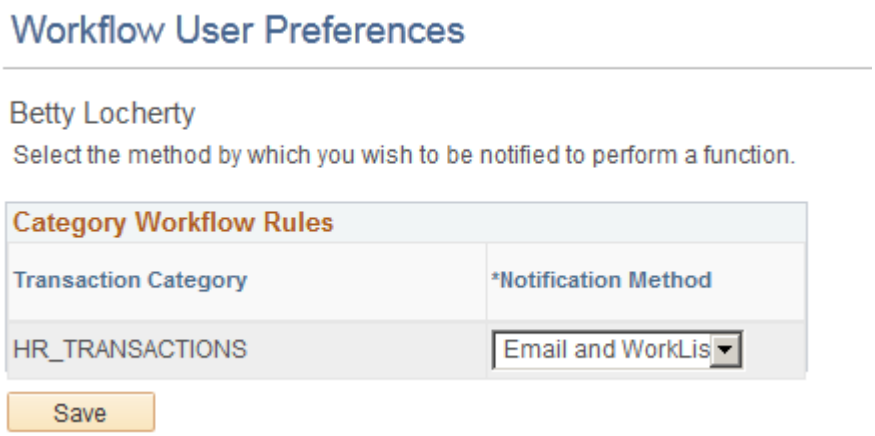
Workflow User Preferences Page

Use the Workflow User Preferences page (HR_SS_WF_EE_PREF) to set up a user's notification method for workflow messages.

Navigation:

Self Service, and then **Workflow User Preferences**, and then **Workflow User Preferences**

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



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Select the method of workflow notifications.

Setting Up PeopleSoft HelpDesk for HR Self Service Integration with CRM

PeopleSoft HelpDesk for HR Self Service Integration facilitates employees to integrate and configure contextual HR HelpDesk specific content on PeopleSoft Fluid HCM Self-service pages. As part of integration, administrators need to setup integration between HCM and CRM nodes and enable the Find Help Related Content service on certain HCM fluid pages as per business needs. Employees can use the Find Help related content service on an HCM transaction page, to search and view solutions which are contextually recommended and report HR HelpDesk cases in CRM For more details on how to configure the integration of PeopleSoft HelpDesk HR Self Service in CRM, refer the topic *HRHD Self Service Integration Setup in CRM* in the *PeopleSoft Call Center Applications* book in the PeopleSoft CRM Online Help.

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(Fluid) Using PeopleSoft Homepages

Understanding PeopleSoft Fluid User Interface Homepages

This overview discusses the PeopleSoft Fluid User Interface.

This video provides and overview of the PeopleSoft Fluid User Interface:

Video: PeopleSoft Fluid User Interface Concepts

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces:

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop.

  This interface was previously known as PIA (PeopleSoft Internet Architecture).

- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

  Oracle delivers fluid pages for a variety of PeopleSoft HCM self-service transactions.

Fluid mode is enabled in web profiles. If fluid mode is not enabled, fluid pages and content references throughout the system are not enabled. Users can still access the classic versions of pages that have both classic and fluid versions, but transactions that exist only as fluid components are not accessible. If fluid mode is enabled, an additional web profile setting controls whether fluid mode is available on desktop devices as well as mobile devices. On desktop devices, fluid pages appear only if the browser supports the PeopleSoft Fluid User Interface. Users with older browsers see only classic pages even if fluid mode is enabled for desktop devices.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.
- *PeopleTools: Fluid User Interface Developer's Guide*

Video: How to Switch Between PeopleSoft Fluid and Classic User Interfaces

Fluid Homepages

Homepages are collections of tiles that users tap to access transactions. A homepage can display different tiles on different form factors. For example, several of the tiles on the delivered employee self-service homepage do not show up on small form factors (phones).

Users can have multiple homepages. When users sign into the system, the user's default homepage displays. To access a different homepage, the user taps the homepage title and then selects a different homepage from the list that appears.

Tapping a tile on a homepage opens the corresponding transaction. Most of the delivered tiles open fluid pages, but a few open classic pages.

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Homepage tiles also can display dynamic information, such as the last pay date or the number of current performance documents. Personalization options enable users to choose which tiles appear on each homepage.

PeopleSoft HCM includes several delivered homepages. The delivered homepages and their tiles are described in these topics:

- Using the Employee Self-Service Homepage
- Using the Manager Self-Service Homepage
- Using the Workforce Administrator Homepage
- Using the Talent Administrator Homepage
- Using the Recruiting Homepage

Video: PeopleSoft Fluid User Interface Experience in HCM

Video: PeopleSoft Fluid User Interface Concepts

Fluid Transactions and Conditional Navigation

If a fluid page is equivalent to a classic page, then in fluid mode, the classic menu provide navigation to the fluid page rather than to the classic page.

For example, when you are not in fluid mode, the classic menu includes the path **Self Service**, and then **Payroll and Compensation**, and then **View Paycheck**, which provides access to the classic View Paycheck page. In fluid mode, this menu path is not available, and instead the classic menu provides a path to the fluid page: **Self Service**, and then **Payroll and Compensation**, and then **Pay.** This substitution means that the classic page is not accessible at all in fluid mode.

The logic that directs users to fluid page rather than an equivalent classic page is known as *conditional navigation.* Conditional navigation is also the mechanism that displays the fluid home when users initially access the system on a mobile device.

If a user on a desktop or laptop accesses a fluid homepage and taps a tile, conditional navigation logic will not redirect the users to a classic page. Note, however, that PeopleSoft HCM delivers some tiles that open classic pages. This is not a function of conditional navigation. The tile opens a classic page because there is no fluid version of the page. The tile functions solely as a navigational shortcut to the classic page.

Documentation for the delivered homepages includes information about conditional navigation for the delivered fluid transactions:

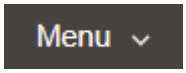
- Employee Self Service Homepage
- Manager Self Service Homepage

Common Elements Used with PeopleSoft Fluid User Interface

A standard banner appears at the top of every fluid page. The banner includes the page title and these standard buttons:

Term	Definition
	Use the **Recently Visited** button to display your recently visited items in the quick access bar.

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Term	Definition
	Use the **Favorites** button to display your favorite items in the quick access bar.
	Use the **Accessibility** button to enable screen reader mode, display a list of keyboard shortcuts, and access information on how to enable and use the accessibility layout features within the application.
	Use the Search Category selector of the Global Search bar to select the global search category for your keyword search. Values include: • *Menu* Select to search menu items available to you. Menu items are those that are available to you from the Navigator menu. It is not recommended that you search for folder labels, such as “search framework.” Instead search for content reference names or descriptions. For example, enter “Deploy Search Objects”, which is a CREF label, or "definition based on worklist", which is a CREF description. • *Insights* Select to search for Insights dashboard and visualizations. You can enter all or part of a dashboard name or description. You can also enter keywords to search for a visualization name that is in a dashboard; the dashboard it is in is displayed. • HCM application categories delivered for Global Search. For a list of application transactions that are available for Global Search, see Using Global Search Definitions for HCM. The search categories that are available to you are based on your permissions.
<Keyword input field>	Click in the keyword input field of the Global Search bar to automatically display search suggestions and to enter search terms. As you type, search suggestions are updated to reflect the search term or terms you’ve entered. **Note:** When displayed on fluid dashboards and pages, the Global Search bar is muted and is activated when selected.
	Use the **Search** button of the Global Search bar to perform the search and review the complete result set on the Search Results page. There, you can filter results, apply advanced search criteria, perform related actions, and so on.
	Use the **Home** button to return to your default homepage, which is the homepage that you arrive at directly upon signon.

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Term	Definition
	Use the **Notifications** button to open the Notifications panel displaying any pending actions and alerts.
	Use the **Actions** button to display the Actions menu.
	Use the **More Actions** button to display the a list of menu items specific to the dashboard you are viewing. **Note:** On small form factor devices, the More Actions menu does not appear and the items are integrated in the Actions menu, similar to PeopleTools 8.59.
	Use the **NavBar** button to display the NavBar (sometimes referred to as the navigation bar). NavBar provides handy navigation options such as Recently Visited, Favorites, Menu (which expands to show the classic menu hierarchy), and Classic Home. Users can also add and remove fluid tiles from the NavBar using personalization options.

For more information about using Global Search, see *PeopleTools: Search Technology*, "Working with PeopleSoft Search," Working with Global Search.

For more information about the controls available on the Fluid banner, see *PeopleTools: Applications User's Guide*, "Working With the PeopleSoft Fluid User Interface," Working with Fluid Pages and Controls.

Understanding Delivered Fluid Pages

This section provides the PeopleSoft Fluid pages listed by HCM application product categories, as represented by the online help Contents menu:

- Common to HCM Core Functionality
- Workforce Data Management
- Workforce Development
- Compensation Management
- Budgets and Requirements Administration
- Self-Service Applications
- Time and Pay
- Global Payroll
- Recruiting Solutions

Common to HCM Core Functionality

This table lists PeopleSoft delivered Fluid pages that are common to HCM core functionality:

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Pending Approvals Page		Image 20	See also Administering Approvals
Pending Approvals - <Transaction Details> Page		Image 20	See also Administering Approvals
Approvals History Page		Image 20	See also Administering Approvals
Approvals History - <Transaction Details> Page		Image 20	See also Administering Approvals
File Definitions Page		Image 18	The File Integration Framework feature is a guided process that assists users in generating Flat files.
Enterprise Components: <Notification> Page (HCSC_NOTIF_ADH_FLU)		Image 20	
Enterprise Components: Announcements Tile		Image 29	The Announcement Tile is added to Employee-Self Service homepage to navigate the announcements page.
Employee Self Service Homepage		Image 9	
Manager Self Service Homepage		Image 9	
Talent Administrator Homepage		Image 17	
Workforce Administrator Homepage		Image 17	
Enterprise Components: Activity Guide Templates Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Introduction Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Enterprise Components: Activity Guide Composer - Activity Guide Type Page		Image 23 Image 31 Image 34 Image 55	Image 31 delivered the Activity Guide Composer framework for Enterprise Components. Image 34 provides the ability to hide steps that are not assigned to a user. Image 55 delivered the overdue process to support an activity guide process due date.
Enterprise Components: Activity Guide Composer - General Information Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Security Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Additional Actions Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Sub Banner Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Select Steps Page		Image 23 Image 29 Image 31	Image 29 delivered Activity Guide Composer for single component, which enables additional configuration and validation at the activity guide composer category level to ensure the user defined steps from a single fluid component. Image 31 delivered the Activity Guide Composer framework for Enterprise Components.

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Enterprise Components: Activity Guide Composer - Organize and Configure Steps Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Display and Processing Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: Activity Guide Composer - Notifications Page		Image 31 Image 55	Image 31 delivered the Activity Guide Composer framework for Enterprise Components. Image 55 delivered the overdue process to support an activity guide process due date.
Enterprise Components: Activity Guide Composer - Review and Activate Page		Image 23 Image 31	Image 31 delivered the Activity Guide Composer framework for Enterprise Components.
Enterprise Components: My Processes Page		Image 23 Image 31 Image 55	Image 31 delivered the Activity Guide Composer framework for Enterprise Components. Image 55 shows an activity guide process due date, if applicable.
Enterprise Components: <Business Process> - Review Activity Guide Page		Image 31 Image 55	Image 55 shows an activity guide process due date, if applicable.
See Configuring and Working With Attachments		Image 24 Image 25 Image 31 Image 32	The sub pages include the documentation for Attachment, Note and Link. Enhanced the Fluid Attachment framework to support multiple attachment types and categories.

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
See Implementing Sensitive Data Masking		Image 26	The Data Masking addresses the protection of sensitive data by providing a configurable option of masking sensitive content in administrator pages.
Component Configuration Page		Image 28	The Data Masking feature enhanced to enable masking for License and Passport Number.
Enterprise Components: Maintain Data Privacy Settings Page		Image 27	The PeopleSoft Data Privacy Framework enables the facility for identifying and maintaining Personally Identifiable and sensitive information.
Enterprise Components: View References Page		Image 28	The PeopleSoft Data Privacy Framework phase II included different types of reference Types in the View References Page.
Installed Products only		Image 30	The filter *Installed Products Only* is added to the Enterprise Components: Maintain Data Privacy Settings Page and Enterprise Components: View References Page tabs to display information on installed products alone.
Enterprise Components: Authorized Roles Page		Image 34	The PeopleSoft Data Privacy Framework is enhanced with Query Masking feature. This page is for identifying PeopleSoft roles and defining access to sensitive record fields.
Enterprise Components: Configure Partial Masking Page		Image 53	This page is to set the number of trailing unmasked characters that should be revealed.

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Enterprise Components: Synchronize Data Page		Image 34	This page is for synchronizing the mappings defined in Data Privacy Framework with the Query system and the authorized roles
Enterprise Components: Exclude Fields Page		Image 34	This page is for identifying fields that should be excluded from the Data Sync process.
Enterprise Components: System Settings Page		Image 34	This page is used to enable/disable Query Masking system setting.
See Editing ChartField Combinations in HCM Fluid Transactions		Image 35	This page is used to understand the Fluid ChartFields for search of combination codes and search types.
Recognition Impact Type Page		Image 48	
Recognition Category Type Page		Image 48	
Configure Recognition Groups Page		Image 48	
Fluid Popup Menu Setup Page		Image 48	
Recognition Preferences Page		Image 48	
Recognition - <Everyone or My Peers> Page		Image 48	
Recognition - Received Page		Image 48	
Recognition - Sent Page		Image 48	
Team Recognition - Received Page		Image 48	
Recognitions Received Page		Image 48	
Team Recognition - Sent Page		Image 48	
New Recognition Page		Image 48	
Profile Information Page		Image 48	
<Received By or Sent To> Page		Image 48	
Liked By Page		Image 48	

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
All Comments Page		Image 48	
Privacy Settings Page		Image 48	
Edit Post Page		Image 48	
Report Post Page		Image 48	
Report Comment Page		Image 48	
View Recognitions Page		Image 48	
Reported Posts and Comments Page		Image 48	
Reported <Original Post or Comment> Page		Image 48	
Insights Catalog Tile		Image 49	
Insights Catalog Navigation Collection			
Approval Insights Dashboard (for Managers)		Image 51	
Admin Approval Insights Dashboard		Image 55	
View Approval Status Page		Image 52	
(Notification Publisher) Enterprise Components: Recipient Type Information Page	Specify Recipient Type Information page	Image 53	Image 53 delivered Notification Publisher for Enterprise Components.
(Notification Publisher) Enterprise Components: Setup Security Page	Setup Security page	Image 53	Image 53 delivered Notification Publisher for Enterprise Components.
(Notification Publisher) Enterprise Components: Recipient Population Source Page	Select Recipient Population Method page	Image 53	Image 53 delivered Notification Publisher for Enterprise Components.
(Notification Publisher) Enterprise Components: Review and Submit Page	Select Recipient Population Method - Confirmation page	Image 53	Image 53 delivered Notification Publisher for Enterprise Components.
(Notification Publisher) Enterprise Components: Publish Notification Page	HR Notification page	Image 53	Image 53 delivered Notification Publisher for Enterprise Components.

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
PeopleSoft (My Home) Landing Page		Image 53 Image 54 Image 55	Image 54 delivers additional Suggestions and Continue with notifications: • Compose Notification for drafts • Dependent Update for Benefits • OffBoarding (for employee and manager) • Performance Review Documents (for employee and manager) (USF) Image 54 provides the Personnel Information tile for Federal users. Image 54 delivers additional Suggestions and Continue with notifications: • Inactive Position • Benefits Online Confirmation Suggestion • ACA 1095C Announcement Image 55 supports adding activity guide process tiles to Landing Page sections.
Quick Access – Benefits, Pay & Time Tile		Image 53 Image 54	Image 54 delivers the Tuition Reimbursement tile.
Personal Details Dashboard		Image 53	
Personal Information Dashboard		Image 54	
Team Dashboard		Image 53 Image 54	Image 54 delivers the Team Tuition Reimbursements tile.
Manage People and Jobs Tile		Image 53	
Manage People and Jobs Dashboard			

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Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
(USF) Manage Personnel Actions Tile		Image 54	
(USF) Manage Personnel Actions Dashboard			
Administer Time and Attendance Dashboard		Image 53	
Recruiting Dashboard		Image 53	
View and Award Badges Page		Image 55	
View Recipients Page		Image 55	
Give a Badge Page		Image 55	
View Digital Badges Page		Image 55	
Badge Details Page		Image 55	
Badge History Page		Image 55	
Traverser Configuration Page		Image 55	
Traverser Component Mapping - Component Mapping Page		Image 55	

Workforce Data Management

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Workforce Data Management products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Current Headcount Insights Dashboard		Image 54	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Workforce Insight Dashboard		Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Current Headcount Page	PeopleSoft Human Resources Administer Workforce: Current Headcount Pivot Grid	Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Headcount Movement Page	PeopleSoft Human Resources Administer Workforce: Headcount Movement Pivot Grid	Image 29	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Workforce Turnover Page		Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Highest Education Page		Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Diversity Overview Page		Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Diversity Analysis Page		Image 29	
Human Resources (Analytics)	PeopleSoft Human Resources Administer Workforce: Position Status Page		Image 29	
Human Resources (Business Partners)	PeopleSoft Human Resources Administer Workforce: View Overlapping Members Page		Image 32	
Human Resources (Business Partners)	PeopleSoft Human Resources Administer Workforce: View Teams (Summary) Page		Image 31	
Human Resources (Business Partners)	PeopleSoft Human Resources Administer Workforce: View Teams (Detail) Page		Image 31	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Company Directory Home Page		Image 12 Image 26 Image 45	Image 26 delivered easier access to a profile and the org chart. See also PeopleSoft Human Resources Administer Workforce: Using the Org Chart Viewer. Image 45 delivers the ability to display a person's remote work status and local time. The administrator can also configure the page to show either the person's job title, business title, or position title.
Human Resources (Company Directory)	Profile Page (see PeopleSoft Human Resources Administer Workforce: Company Directory Profile Page Layout)		Image 12 Image 41 Image 45	Image 41 delivers the ability to display an employee's pronouns. Image 45 delivers the ability to display a person's remote work status and local time. The administrator can also configure the page to show either the person's job title, business title, or position title.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Company Directory)	Supplementary Panel (see PeopleSoft Human Resources Administer Workforce: Company Directory Profile Page Layout)		Image 18	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: (Smartphone) Profile Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 17 Image 41 Image 45	Image 41 delivers the ability to display an employee's pronouns. Image 45 delivers the ability to display a person's time zone and remote work status.
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Contact Information Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Address Page		Image 17	Available when eLocation map services is licensed.
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Reporting Structure Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12 Image 28	Image 28 delivered the ability to display empty positions in the organization chart.
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Manage Dotted Line Page		Image 23	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Directs Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12 Image 28	Image 28 delivered the ability to display empty positions in the organization chart.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Peers Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12 Image 28	Image 28 delivered the ability to display empty positions in the organization chart.
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Other Teams - <Team Name> Page	PeopleSoft Human Resources Administer Workforce: Org Chart Viewer - Teams Page	Image 12	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Job Details Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - Business Partners Page		Image 31	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Profile - About Page	PeopleSoft Human Resources Administer Workforce: Profile Page	Image 12	
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Organization Chart Page	PeopleSoft Human Resources Administer Workforce: Org Chart Page	Image 12 Image 23 Image 27 Image 28	Image 23 delivered small form factor accessibility. Image 27 delivered exporting and printing capabilities, the ability to show or hide peers, and easier viewing options. Image 28 delivered the ability to display empty positions in the organization chart.
Human Resources (Company Directory)	PeopleSoft Human Resources Administer Workforce: Export Org Chart Page or Export Organization Chart Page		Image 28	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Company Directory-Chatbot)	PeopleSoft Human Resources Administer Workforce: (Web-Based) Employee Directory Assistant Page		Image 33	
Human Resources (Dotted Line)	PeopleSoft Human Resources Administer Workforce: Dotted Line Page		Image 23	
Human Resources (Fluid Approvals - Dotted Line)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Dotted Line Page		Image 23	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: Manage Human Resources Dashboard		Image 36 Image 47 Image 50	Image 36 delivered the PeopleSoft Human Resources Administer Workforce: Manage Job Tile and pages. Image 47 delivered the following tiles: • PeopleSoft Human Resources Administer Workforce: Add Person Tile • PeopleSoft Human Resources Administer Workforce: Modify Person Tile • PeopleSoft Human Resources Administer Workforce: Create Employee Tile • PeopleSoft Human Resources Administer Workforce: Create Contingent Worker Tile • PeopleSoft Human Resources Administer Workforce: Create

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
				Person of Interest Tile • PeopleSoft Human Resources Administer Workforce: (Fluid) Organizational Relationship Tile • PeopleSoft Human Resources Administer Workforce: (Fluid) Maintain Person of Interest Tile Image 50 uses the configurable header feature for Fluid.
Human Resources (Fluid Job Data)	Manage Job Search Page (see PeopleSoft Human Resources Administer Workforce: Understanding the Manage Job - Search Criteria Page)		Image 36	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: Job Actions Summary Page		Image 36 Image 50	Image 50 uses the configurable header feature for Fluid for many of the Manage Job employee headers. This image also added the ability to change the access mode (Update/ Display, Include History, Correct History) and use Previous In List and Next In List buttons from the Job Actions Summary page.
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Work Location Page	PeopleSoft Human Resources Administer Workforce: Work Location Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Job Information Page	PeopleSoft Human Resources Administer Workforce: Job Information Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Labor Information Page	PeopleSoft Human Resources Administer Workforce: Job Labor Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Salary and Compensation Page	PeopleSoft Human Resources Administer Workforce: Job Data - Salary Plan Page PeopleSoft Human Resources Administer Workforce: Compensation Page	Image 36	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Payroll Page	PeopleSoft Human Resources Administer Workforce: Payroll Page PeopleSoft Human Resources Administer Workforce: Job Earnings Distribution Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Employment Data Page	PeopleSoft Human Resources Administer Workforce: Employment Information Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Benefit Program Page	PeopleSoft Human Resources Administer Workforce: Benefit Program Participation Page	Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) <Drop Zone> Pages		Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Job Data - Attachments Page		Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Validate Page		Image 36	
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Job Data - Summary Page		Image 36 Image 42	Image 42 allows the requestor to enter comments to share with the approver.
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Job Data - Comments Page		Image 42	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Job Data)	PeopleSoft Human Resources Administer Workforce: Job Details Page		Image 36 Image 40 Image 42	Image 40 provides updates to the page name and navigation. Image 42 allows you to view all comments for a transaction row.
Human Resources (Fluid Approvals - Manage Job Data)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Create Job Page or Pending Approvals - Correct Job Page		Image 36 Image 42	Image 42 allows you to view all comments for a transaction row.
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Add Person Page		Image 47	
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Request Details Page		Image 47	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Person Data Page • PeopleSoft Human Resources Administer Workforce: Person Data Page - Person Details Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Contact Information Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Regional Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - CheckList Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - <Drop Zone> Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Validation Section	PeopleSoft Human Resources Administer Workforce: Biographical Details Page PeopleSoft Human Resources Administer Workforce: Add a Person or Modify a Person - Contact Information Page PeopleSoft Human Resources Administer Workforce: Add a Person or Modify a Person - Regional Page	Image 47 Image 48 Image 49 Image 50	Image 48 delivers fluid attachment capability for veteran status. It also enables administrators to view attachments uploaded from Employee Self Service when using the Modify Person pages. Image 49 incorporates new preferred name fields and supports formal and display names. Image 50 uses the configurable header feature for Fluid for many of the employee headers for people in the system.
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Add Person - Summary Page		Image 47	
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Submit Confirmation Page		Image 47	
Human Resources (Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Add Person of Interest or Maintain Person of Interest Page	PeopleSoft Human Resources Administer Workforce: (Classic) Add a POI Relationship or Maintain Person of Interest Page	Image 47	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Add Person Tile PeopleSoft Human Resources Administer Workforce: Modify Person Tile		Image 53	Image 53 delivers Fluid Person Data for federal users.
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Add Person Page		Image 53	Image 53 delivers Fluid Person Data for federal users.
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Request Details Page		Image 53	Image 53 delivers Fluid Person Data for federal users.
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Person Data Page • PeopleSoft Human Resources Administer Workforce: Person Data Page - Person Details Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Contact Information Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Regional Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - CheckList Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - <Drop Zone> Section • PeopleSoft Human Resources Administer Workforce: Person Data Page - Validation Section		Image 53	Image 53 delivers Fluid Person Data for federal users.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Add Person - Summary Page		Image 53	Image 53 delivers Fluid Person Data for federal users.
Human Resources (USF - Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: Submit Confirmation Page		Image 53	Image 53 delivers Fluid Person Data for federal users.
Human Resources (USF-Federal Fluid Person Data)	PeopleSoft Human Resources Administer Workforce: (USF) (Fluid) Add Organizational Relationship Page		Image 53	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: Job Data Page • PeopleSoft Human Resources Administer Workforce: Job Data Page - Work Location Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Job Information Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Labor Information Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Salary and Compensation Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Payroll Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Employment Data Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Benefit Program Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - <Drop Zone> Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Attachments Section • PeopleSoft Human Resources Administer Workforce: Job Data Page - Validation Section	PeopleSoft Human Resources Administer Workforce: Work Location Page PeopleSoft Human Resources Administer Workforce: Job Information Page PeopleSoft Human Resources Administer Workforce: Job Labor Page PeopleSoft Human Resources Administer Workforce: Payroll Page PeopleSoft Human Resources Administer Workforce: Job Data - Salary Plan Page PeopleSoft Human Resources Administer Workforce: Compensation Page PeopleSoft Human Resources Administer Workforce: Employment Information Page PeopleSoft Human Resources Administer Workforce: Job Earnings Distribution Page PeopleSoft Human Resources Administer Workforce: Benefit Program Participation Page	Image 47 Image 50	Image 50 uses the configurable header feature for Fluid.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: Create <Organizational Relationship> - Summary Page		Image 47	
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: Create <Organizational Relationship> - Submit Confirmation Page		Image 47	
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Organizational Relationship Page	PeopleSoft Human Resources Administer Workforce: (Classic) Person Organizational Summary Page	Image 47	
Human Resources (Fluid Person and Job Data)	PeopleSoft Human Resources Administer Workforce: (Fluid) Add Organizational Relationship Page	PeopleSoft Human Resources Administer Workforce: (Classic) Add a Person - Organizational Relationships Page	Image 47	
Human Resources (Fluid Approvals - Person and Job Data)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Add <Organizational Relationship> Page		Image 47 Image 48	Image 48 allows approvers to make edits to organizational relationship requests.
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Work Authorization Setup Page		Image 50	
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: My Tasks Page		Image 50	
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Delegated Tasks Page		Image 50	
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Employee Tasks Page		Image 50	
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Completed I-9's Page		Image 50	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Verify/ Reverify Form I9 Page - Section 2. Employer Review and Verification	PeopleSoft Human Resources Administer Workforce: (Employer) Employment Eligibility Verification Page, Section 2. Employer Review and Verification	Image 50	
Human Resources (Form I-9)	PeopleSoft Human Resources Administer Workforce: Verify/ Reverify Form I9 Page - Supplement B, Reverification and Rehire (formerly Section 3)	PeopleSoft Human Resources Administer Workforce: (Employer) Employment Eligibility Verification Page, Supplement B, Reverification and Rehire (formerly Section 3)	Image 50	
Human Resources (Fluid Approvals - Form I-9)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Form I9 Request Page		Image 50	
Human Resources (PeopleSoft Insights)	PeopleSoft Human Resources Administer Workforce: Workforce Composition Dashboard		Image 34 Image 41	Image 41 delivers the Workforce Composition tile for easy access to the dashboard.
Human Resources (PeopleSoft Insights)	PeopleSoft Human Resources Administer Workforce: Workforce Equity Dashboard		Image 34	
Human Resources (Matrix Team)	PeopleSoft Human Resources Administer Workforce: Manage Matrix Teams Page		Image 17	
Human Resources (Fluid Approvals - Matrix Team)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Matrix Team Page		Image 20	
Human Resources (Fluid Approvals - Military Rank Change)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Military Rank Change Page	PeopleSoft Human Resources Administer Workforce: Review Military Rank Change Page	Image 24	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Involuntary Template) Acknowledgement of final check receipt Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Involuntary Template) Acknowledgement of submission of final expenses Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Voluntary Template) Introduction video Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Voluntary Template) Exit Survey Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Voluntary Template) Letter of Resignation Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Voluntary Template) Acknowledge Final Check Page		Image 32	
Human Resources (OffBoarding)	PeopleSoft Human Resources Administer Workforce: (Manager Only Step) Manager Checklist Page		Image 45	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Manager Checklist Page		Image 51	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Dashboard		Image 23 Image 33	Image 33 provides access to the Business Partners tile and page from the OnBoarding dashboard.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Activities Page (for Employees)		Image 23 Image 50	Image 50 supports the PreBoarding phase of the activity guide, which enables prospective employees the ability to access and start the OnBoarding process before their start date.
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Activities Page (for Managers)		Image 51	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Before You Start Page (OnBoarding)		Image 23 Image 51	Image 51 provides this page as a manager step in the OnBoarding process.
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Welcome Page		Image 23	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Documents Page		Image 23	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Attachments Page		Image 23	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Personal Details - Photo Page		Image 23	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: Summary Page (or Overall Summary) Page		Image 23	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Activities Page (for Managers)		Image 24	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Status Page (for Managers)		Image 24	
Human Resources (OnBoarding)	PeopleSoft Human Resources Administer Workforce: OnBoarding Status Page (for Administrators)		Image 28	
Human Resources (OnBoarding - PreBoarding Phase)	PeopleSoft Human Resources Administer Workforce: (PreBoarding phase only) PreBoarding Instructions Page		Image 50	
Human Resources (OnBoarding - PreBoarding Phase)	PeopleSoft Human Resources Administer Workforce: (PreBoarding phase) PreBoarding Document Acknowledgement Page		Image 50	
Human Resources (OnBoarding - PreBoarding Phase)	PeopleSoft Human Resources Administer Workforce: (PreBoarding phase only) PreBoarding Summary Page		Image 50	
Human Resources (OnBoarding - OnBoarding Phase)	PeopleSoft Human Resources Administer Workforce: (OnBoarding phase only) OnBoarding Instructions Page		Image 50	
Human Resources (OnBoarding - OnBoarding Phase)	PeopleSoft Human Resources Administer Workforce: (OnBoarding phase only) OnBoarding Document Acknowledgement Page		Image 50	
Human Resources (OnBoarding Insights)	PeopleSoft Human Resources Administer Workforce: OnBoarding Insight Dashboard (for Administrators)		Image 49	
Human Resources (OnBoarding Insights)	PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Insight Dashboard (for Managers)		Image 49	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Position Management Dashboard		Image 29	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Administer Positions Tile		Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Position Details Page		Image 29 Image 37	Image 37 delivers user interface updates such search results navigation buttons and a more prominent Add Row button.
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Clone Page		Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Request Details Page		Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Edit Position Page		Image 37	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage/Create Position - Position Data Page	PeopleSoft Human Resources Manage Positions: Position Data - Description Page	Image 29 Image 49 Image 51	(USF) Image 49 includes the following new USF fields for OPF reporting: • Program and Project Management field • Remote/ Telework Type Image 51 delivered the Remote Worker Eligibility fields to enable remote worker eligibility and identify remote worker types available for a position.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Current Incumbents Page		Image 33	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage/Create Position - Additional Information Page	PeopleSoft Human Resources Manage Positions: Position Data - Specific Information Page	Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage/Create Position - Attachments Page		Image 30	In image 30, the attachments section is now on its own page.
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage/Create Position - Budget Incumbents Page	PeopleSoft Human Resources Manage Positions: Position Data - Budget and Incumbents Page	Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage/Create Position - Review and Submit Page		Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: View Position Page		Image 29	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage Primary Incumbents Page		Image 33	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Primary Incumbent History Page		Image 33	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Position Incumbents Page		Image 48	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage Position - Position Data Page		Image 50	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage Position - Position Attachments Page		Image 50	
Human Resources (Position Management)	PeopleSoft Human Resources Manage Positions: Manage Position - Review and Submit Page		Image 50	
Human Resources (Fluid Approvals - Position Management)	PeopleSoft Human Resources Manage Positions: Pending Approvals - Create (or Manage or Update) Position Page		Image 29 Image 31 Image 50	Image 31 delivered Approval Edit capabilities. Image 50 support approvals for the manager Update Position requests for empty positions.
Human Resources (Fluid Approvals - Position Management)	PeopleSoft Human Resources Manage Positions: Attachments Page		Image 29	
Human Resources (Position Management Insights)	PeopleSoft Human Resources Manage Positions: Position Management Insights Dashboard		Image 48	
Human Resources (Remote Worker Requests)	Remote Worker Search Page (see PeopleSoft Human Resources Administer Workforce: Understanding the Remote Worker - Search Criteria Page for Administrators)		Image 40	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Remote Worker Request Page		Image 40 Image 45 Image 48 Image 51	Image 45 gives administrators the ability to delete requests. Image 48 enhanced the Remote Worker feature to automatically add or update the end date of an existing remote worker request when a new request overlaps with the current one. Image 51 allows you to restrict the eligible remote work types for an employee's job code or position as well as limit retroactive requests for employees or managers.
Human Resources (Remote Worker Requests)	PeopleSoft eProfile: (Employee) Remote Worker Request - Acknowledgement Page		Image 40	
Human Resources (Remote Worker Requests)	PeopleSoft eProfile: (Employee) Remote Worker Request - Verify Address Page		Image 46	
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Remote Worker Request - Request Details Page		Image 40 Image 51	Image 51 allows you to restrict the eligible remote work types for an employee's job code or position.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Remote Worker Request - Attachments Page		Image 40	
Human Resources (Remote Worker Requests)	PeopleSoft eProfile: (Employee) Remote Worker Request - Workplace Support Page		Image 40	
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Remote Worker Request - Review and Submit Page		Image 40	
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Request Details Page		Image 40 Image 42 Image 53	Image 42 gives you access to view the employee's answers to the remote work questionnaire. Image 53 delivers remote worker Insight visualizations for managers and administrators.
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Questionnaire Page		Image 42	
Human Resources (Remote Worker Requests)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Remote Worker Page		Image 40	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (Remote Worker Insights)	PeopleSoft Human Resources Administer Workforce: Remote Worker Insights Dashboard (for Administrators)		Image 40 Image 44 Image 45	Image 44 includes additional analytics for reason, eligibility, location maps, and historical data. Image 45 allows administrators to view the vaccination status of employees by remote work status.
Human Resources (Remote Worker Insights)	PeopleSoft Human Resources Administer Workforce: Remote Worker Dashboard (for Managers)		Image 42 Image 44	Image 44 includes additional analytics for reason, eligibility, and historical data.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (USF - Personnel Action Requests)	Create/View Personnel Actions Page (see PeopleSoft Human Resources Administer Workforce: Creating Personnel Actions Using Fluid)	PeopleSoft Human Resources Administer Workforce: Add Employment Instance USF Page (See also PeopleSoft Human Resources Administer Workforce: Initiating and Requesting Personnel Actions)	Image 24 Image 49 Image 54 Image 55	Image 49 includes the following new USF fields for OPF reporting: • Program and Project Management field • Remote/ Telework Type Image 54 delivers the Position Effective Sequence field to select the appropriate position data for the employee record. Image 55 enables administrators to view personnel action history in a separate window while completing PAR requests.
Human Resources (USF - Fluid Approvals - Personnel Action Requests)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Personnel Action Request Page	PeopleSoft Human Resources Administer Workforce: Authorizing and Approving Personnel Actions	Image 24 Image 50 Image 55	Image 50 enables the final approver to edit the effective date for PAR transactions. Image 55 enables administrators to view personnel action history in a separate window while completing PAR requests.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Human Resources (USF - Fluid Approvals - Personnel Action Requests)	PeopleSoft Human Resources Administer Workforce: Canceling a PAR	PeopleSoft Human Resources Administer Workforce: Cancellation Details Page	Image 25	

Workforce Development

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Workforce Development products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Current Documents Page (Team Performance)	PeopleSoft ePerformance: Current <Performance or Development> Documents Page or <Performance or Development> Documents Page	Image 9	
ePerformance	PeopleSoft ePerformance: Create Documents Page (Team Performance)	PeopleSoft ePerformance: Create <Performance or Development> Documents - Document Creation Details Page	Image 9	
ePerformance	PeopleSoft ePerformance: Delegated Documents Page (Team Performance)		Image 9	
ePerformance	PeopleSoft ePerformance: Historical Documents Page (Team Performance)	PeopleSoft ePerformance: <Performance or Development> Document History Page	Image 9	
ePerformance	PeopleSoft ePerformance: Transfer Documents Page (Team Performance)	PeopleSoft ePerformance: Transfer Document Page	Image 29	
ePerformance	PeopleSoft ePerformance: Reopen Documents Page (Team Performance)	PeopleSoft ePerformance: Reopen Document Page	Image 29	
ePerformance	PeopleSoft ePerformance: Cancel Documents Page (Team Performance)	PeopleSoft ePerformance: Cancel Document Page	Image 29	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Delete Documents Page (Team Performance)	PeopleSoft ePerformance: Delete Documents Page	Image 29	
ePerformance	PeopleSoft ePerformance: Enter Preliminary Ratings Page (Team Performance)	PeopleSoft ePerformance: Enter Preliminary Ratings Page	Image 29	
ePerformance	PeopleSoft ePerformance: View-Only Documents - Select Employee Page (Team Performance)	PeopleSoft ePerformance: (Classic) Viewing Documents for Your Team	Image 29	
ePerformance	PeopleSoft ePerformance: Create Documents by Group - Results Page (Team Performance)	PeopleSoft ePerformance: Create <Performance or Development> Documents - Results Page	Image 29	
ePerformance	PeopleSoft ePerformance: Team Performance Status Page	PeopleSoft eProfile Manager Desktop: My Team's Performance Status Pagelet	Image 9	
ePerformance	PeopleSoft ePerformance: Pending Approvals - Performance Page	PeopleSoft ePerformance: Approve Document Page	Image 20	
ePerformance	PeopleSoft ePerformance: My Current Documents Page	PeopleSoft ePerformance: Current <Performance or Development> Documents Page or <Performance or Development> Documents Page	Image 9	
ePerformance	PeopleSoft ePerformance: Create Document Page (Performance)	PeopleSoft ePerformance: Create <Performance or Development> Documents Page	Image 9	
ePerformance	PeopleSoft ePerformance: My Historical Documents Page	PeopleSoft ePerformance: <Performance or Development> Document History Page	Image 9	
ePerformance	PeopleSoft ePerformance: Evaluations of Others Page	PeopleSoft ePerformance: My Current Evaluations for Others Page	Image 9	
ePerformance	PeopleSoft ePerformance: Historical Evaluations of Others Page	My Historical Evaluations for Others Page (See PeopleSoft ePerformance: (Classic) Viewing Historical Documents)	Image 9	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Auto Transfer Document Status Page		Image 30	
ePerformance	PeopleSoft ePerformance: Team Performance Dashboard		Image 45	
ePerformance	PeopleSoft ePerformance: Team Documents - Team Documents Page	PeopleSoft ePerformance: Current Documents Page (Team Performance) and PeopleSoft ePerformance: Historical Documents Page (Team Performance)	Image 45	
ePerformance	PeopleSoft ePerformance: Team Documents - Delegated Documents Page	PeopleSoft ePerformance: Delegated Documents Page (Team Performance)	Image 45	
ePerformance	PeopleSoft ePerformance: My Documents - My Documents Page	PeopleSoft ePerformance: My Current Documents Page and PeopleSoft ePerformance: My Historical Documents Page	Image 45	
ePerformance	PeopleSoft ePerformance: My Documents - Evaluations of Others Page	PeopleSoft ePerformance: Evaluations of Others Page and PeopleSoft ePerformance: Historical Evaluations of Others Page	Image 45	
ePerformance	PeopleSoft ePerformance: Performance Document Page	PeopleSoft ePerformance: Define Criteria Page, PeopleSoft ePerformance: Checkpoint <#> Page, PeopleSoft ePerformance: Finalize Criteria Page, and PeopleSoft ePerformance: <Manager or Self-> Evaluation Page	Image 45	
ePerformance	PeopleSoft ePerformance: Select/ Create Items - Pre-defined Page	PeopleSoft ePerformance: Add a Pre-Defined <section item> Page	Image 45	
ePerformance	PeopleSoft ePerformance: Select/ Create Items - Your Own Page	PeopleSoft ePerformance: Add Your Own <section item> or Edit <section item> Page	Image 45	
ePerformance	PeopleSoft ePerformance: Select/ Create Items - Business Objectives Page	PeopleSoft ePerformance: Copy from Business Objectives Page	Image 45	
ePerformance	PeopleSoft ePerformance: Select/ Create Items - Manager Document Page	PeopleSoft ePerformance: Copy from Manager Document Page	Image 45	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Select/ Create Items - My Document Page	PeopleSoft ePerformance: Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page	Image 45	
ePerformance	PeopleSoft ePerformance: Select/ Create Items - Team Document Page	PeopleSoft ePerformance: Copy <section item> from My Documents or Copy <section item> from My Team's Documents Page	Image 45	
ePerformance	PeopleSoft ePerformance: <Section Name> in List Page		Image 45	
ePerformance	PeopleSoft ePerformance: Details Page		Image 45	
ePerformance	PeopleSoft ePerformance: Performance Document Item Page	PeopleSoft ePerformance: Add Your Own <section item> or Edit <section item> Page	Image 45	
ePerformance	PeopleSoft ePerformance: Alignment Chain Page	Alignment Chain page	Image 45	
ePerformance	PeopleSoft ePerformance: Sub-Items Page	PeopleSoft ePerformance: Add a <section item> Behavior Page (EP_APPR_EDIT7)	Image 45	
ePerformance	PeopleSoft ePerformance: My Notes Page	PeopleSoft ePerformance: Performance Notes - Add/ Update Notes Page	Image 45	
ePerformance	PeopleSoft ePerformance: Quick Evaluation Page		Image 45	
ePerformance	PeopleSoft ePerformance: Notify Page	Send Notification page	Image 45	
ePerformance	PeopleSoft ePerformance: Rating History Page	Rating History page	Image 45	
ePerformance	PeopleSoft ePerformance: 360 Graphical View Page	360 Graphical View page	Image 45	
ePerformance	PeopleSoft ePerformance: Attachment Page	Attachment page	Image 45	
ePerformance	PeopleSoft ePerformance: Last Updated Page		Image 45	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Performance Process Overview Page	Overview page	Image 45	
ePerformance	PeopleSoft ePerformance: <Section or Item> Weight Page		Image 45	
ePerformance	PeopleSoft ePerformance: Reorder Items Page		Image 45	
ePerformance	PeopleSoft ePerformance: <Section> Page (Delete Multiple Items)		Image 45	
ePerformance	PeopleSoft ePerformance: Average Ratings Page	Average Ratings page	Image 45	
ePerformance	PeopleSoft ePerformance: Copy to Other Documents Page		Image 45	
ePerformance	PeopleSoft ePerformance: Rating Model Page	Rating Model page	Image 45	
ePerformance	PeopleSoft ePerformance: Add/ Review Participants Page	PeopleSoft ePerformance: Nominate Participants - Add Nominees Page and PeopleSoft ePerformance: Nominate Participants - Track Nominations Page	Image 45	
ePerformance	PeopleSoft ePerformance: Performance Document Page (Participant Evaluation) or Participant Evaluation Page	PeopleSoft ePerformance: Peer Evaluation Page	Image 45	
ePerformance	PeopleSoft ePerformance: Self-Evaluation - <Status> Page	PeopleSoft ePerformance: <Manager or Self-> Evaluation Page	Image 45	
ePerformance	PeopleSoft ePerformance: Document Insights Dashboard		Image 46	
ePerformance	PeopleSoft ePerformance: Performance Insights Dashboard		Image 46	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Team Document Insights Dashboard		Image 46	
ePerformance	PeopleSoft ePerformance: Team Performance Insights Dashboard		Image 46	
ePerformance	PeopleSoft ePerformance: Check Language Page	PeopleSoft ePerformance: Check Language Page	Image 46	
ePerformance	PeopleSoft ePerformance: Writing Suggestions - All Page	PeopleSoft ePerformance: Writing Tools - Suggested Results Page	Image 46	
ePerformance	PeopleSoft ePerformance: Writing Suggestions - Evaluators' Comment Page	PeopleSoft ePerformance: Writing Tools - Evaluators' Comments Page	Image 46	
ePerformance	PeopleSoft ePerformance: Writing Suggestions - Development Tips Page	PeopleSoft ePerformance: Find Development Tips Page	Image 46	
ePerformance	PeopleSoft ePerformance: Writing Suggestions - Results Writer Page	PeopleSoft ePerformance: Writing Tools - Results Writer Statements Page	Image 46	
ePerformance	PeopleSoft ePerformance: Writing Suggestions - Performance Notes Page	PeopleSoft ePerformance: Writing Tools - Performance Notes Page	Image 46	
ePerformance	PeopleSoft ePerformance: Business Objectives Page	PeopleSoft ePerformance: Manage Business Objectives - Select Business Objectives Page	Image 47	
ePerformance	PeopleSoft ePerformance: View Business Objectives Page		Image 47	
ePerformance	PeopleSoft ePerformance: New Business Objective Document Page	PeopleSoft ePerformance: Create Business Objectives Page	Image 47	
ePerformance	PeopleSoft ePerformance: Business Objectives Document Page	PeopleSoft ePerformance: Update Objectives - <Department or Position> Page	Image 47	
ePerformance	PeopleSoft ePerformance: Select / Create Objectives - Pre-defined Page		Image 47	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Select / Create Objectives - Custom Page		Image 47	
ePerformance	PeopleSoft ePerformance: <Section Name> in List Page		Image 47	
ePerformance	PeopleSoft ePerformance: Document Details Page		Image 47	
ePerformance	PeopleSoft ePerformance: Published Objectives Page		Image 47	
ePerformance	PeopleSoft ePerformance: Business Objectives Document Page	PeopleSoft ePerformance: View Objectives - <Name of Objective> Page	Image 47	
ePerformance	PeopleSoft ePerformance: Notify Owner Page		Image 47	
ePerformance	PeopleSoft ePerformance: Business Objectives - <Date> Page		Image 47	
ePerformance	PeopleSoft ePerformance: Edit Items - <Objective Name> Page		Image 47	
ePerformance	PeopleSoft ePerformance: <Section Name> - Goals Page		Image 47	
ePerformance	PeopleSoft ePerformance: Employees Aligned to Organizational Objectives Page		Image 47	
ePerformance	PeopleSoft ePerformance: Alignment Chain Page		Image 47	
ePerformance	PeopleSoft ePerformance: Reorder Objective Items Page		Image 47	
ePerformance	PeopleSoft ePerformance: Reactivate Objective Items Page		Image 47	
ePerformance	PeopleSoft ePerformance: Last Updated Page		Image 47	
ePerformance	PeopleSoft ePerformance: Publish Page		Image 49	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Cascade Items Page		Image 49	
ePerformance	PeopleSoft ePerformance: Review Manager Cascaded Items Page		Image 49	
ePerformance	PeopleSoft ePerformance: Cascaded Items Page (Read-only)		Image 49	
ePerformance	PeopleSoft ePerformance: Team Rating Insights Dashboard		Image 50	
ePerformance	PeopleSoft ePerformance: Instructions Page		Image 51	
ePerformance	PeopleSoft ePerformance: Exclude Item Ratings Page		Image 52	
ePerformance	PeopleSoft ePerformance: Exclude Rating Page		Image 52	
ePerformance	PeopleSoft ePerformance: Excluded Items Page		Image 52	
ePerformance	PeopleSoft ePerformance: Performance Notes Page or My Performance Notes Page (Note List)		Image 52	
ePerformance	PeopleSoft ePerformance: Add Note Page	PeopleSoft ePerformance: Performance Notes - Add/ Update Notes Page	Image 52	
ePerformance	PeopleSoft ePerformance: Performance Notes Page or My Performance Notes (Note Details)	PeopleSoft ePerformance: Performance Notes Page or My Performance Notes Page	Image 52	
ePerformance	PeopleSoft ePerformance: Update Note Page	PeopleSoft ePerformance: Performance Notes - Add/ Update Notes Page	Image 52	
ePerformance	PeopleSoft ePerformance: Advance by Document Search - Select Documents Page		Image 54	
ePerformance	PeopleSoft ePerformance: Advance by Document Search - Submit Page		Image 54	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
ePerformance	PeopleSoft ePerformance: Review Advanced Documents - Detail Page		Image 54	
ePerformance	PeopleSoft ePerformance: Review Advanced Documents - List Page		Image 54	
Manage Profiles	PeopleSoft Human Resources Manage Profiles: Manage Profiles Dashboard		Image 36	
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Start a New Search Page	(Classic) Search for Profiles Page (see PeopleSoft Human Resources Manage Profiles: (Classic) Searching and Comparing Profiles)	Image 36 Image 40	Image 40 delivers the ability to select from saved searches.
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Search Profiles Page	PeopleSoft Human Resources Manage Profiles: (Classic) Select a Profile Page	Image 36	
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Adhoc Search Profiles Page		Image 36	
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Search Criteria Page	PeopleSoft Human Resources Manage Profiles: (Classic) Search Criteria Page	Image 36 Image 39 Image 40	Image 39 provides the ability to include related items in your search criteria. Image 40 delivers the ability to save searches.
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Search Results Page	PeopleSoft Human Resources Manage Profiles: (Classic) Search Results Page	Image 36	
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Compare Results Page	PeopleSoft Human Resources Manage Profiles: (Classic) Compare Results Page	Image 36 Image 39	Image 39 provides the ability to include related items in your search criteria.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Manage Profiles	PeopleSoft Human Resources Manage Profiles: (Fluid) Profile Compare Page	PeopleSoft Human Resources Manage Profiles: (Classic) Compare Profiles Page	Image 36	
Tuition Reimbursement	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement (Landing) Page		Image 54	
Tuition Reimbursement	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Reimbursement Type Page		Image 54	
Tuition Reimbursement	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement (Details) Page		Image 54	
Tuition Reimbursement	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement (View Summary) Page		Image 54	
Tuition Reimbursement	PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Pending Approvals - Pre-Authorize Tuition or Reimburse Tuition Page		Image 54	

Compensation Management

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Compensation Management products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Compensation	PeopleSoft Human Resources Administer Compensation: Total Rewards Page	PeopleSoft Human Resources Administer Compensation: Total Rewards Page (Classic)	Image 20	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Compensation	PeopleSoft eCompensation Manager Desktop: Pending Approvals - Allocate Compensation Page	Approve Compensation Proposals Page	Image 25	
Compensation	PeopleSoft eCompensation Manager Desktop: View Compensation History Page (Fluid Manager View) and PeopleSoft eCompensation Manager Desktop: Compensation History Page (Fluid Employee View)	PeopleSoft eCompensation Manager Desktop: Compensation History Page (Classic Manager View) and PeopleSoft eCompensation Manager Desktop: Compensation History Page (Classic Employee View)	Image 28	
Benefits Administration	PeopleSoft Benefits Administration: Open Enrollment Tile		Image 28	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Statement Options Page		Image 28	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Enrollment Event Selection Page		Image 28	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Enrollment Page		Image 28	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Benefits Administration (Lists all benefit plan pages)	PeopleSoft Benefits Administration: Medical Page Dental Page Medical/Dental Page Major Medical Page Vision Page Domestic Partner Medical Page Domestic Partner Dental Page Domestic Partner Vision Page PeopleSoft Benefits Administration: Life Page PeopleSoft Benefits Administration: Supplemental Life Page AD and D Page Life and AD and D Page Dependent AD and D Page Dependent Life Page Survivor Income Page Supplemental AD and D Page Spousal Life Page PeopleSoft Benefits Administration: Short-Term Disability Page Long-Term Disability Page PeopleSoft Benefits Administration: 401(k) Page Profit Sharing Page Thrift Page		Image 28	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
	IRA Page Capital Accumulation Page U.S. Savings Bonds Page 403(b) Page Nonelective Contributions Page Employer Only Page Section 456 Page Employee Stock Purchase Page PeopleSoft Benefits Administration: Sick Page Vacation Page Personal Page Family and Medical Act Page PeopleSoft Benefits Administration: Flex Spending Health – U.S. Page Flex Spending Dependent Care Page Flex Spending Health – Canada Page Retirement Counselling Page PeopleSoft Benefits Administration: Health Savings Account PageHealth Savings Account Page PeopleSoft Benefits Administration: PERS (Public Employee Retirement Systems) Page PeopleSoft Benefits			

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
	Administration: Standard Pension Page			
	Pension Plan 1 - U.S. Page			
	Pension Plan 2 - U.S. Page			
	Pension Plan 3 - U.S. Page			
	Pension Plan 4 - U.S. Page			
	Pension Plan 5 - U.S. Page			
	Pension Plan 6 - U.S. Page			
	PeopleSoft Benefits Administration: Vacation Buy Page			
	Vacation Sell Page			
	PeopleSoft Benefits Administration: Long-Term Care Page			
	Legal Services Page			
	Wellness Credit Page			
Benefits Administration	PeopleSoft Benefits Administration: Online Confirmation Statements Page		Image 29	
Benefits Administration	PeopleSoft Benefits Administration: Review Employee Statements Page		Image 29	
Benefits Administration	PeopleSoft Benefits Administration: Benefit Details Tile Dashboard		Image 34	
Benefits Administration	PeopleSoft Benefits Administration: Benefits WorkCenter Page		Image 34	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Benefits Administration	PeopleSoft Benefits Administration: Birth Date or Adoption Date Page		Image 35	
Benefits Administration (Benefits Assistant)	PeopleSoft Benefits Administration: Benefits Assistant Page		Image 36	
Benefits Administration	PeopleSoft Benefits Administration: Review Benefits Attachment Page		Image 37	
Benefits Administration	PeopleSoft Benefits Administration: Life Event Document Upload Page		Image 37	
Benefits Administration	PeopleSoft Benefits Administration: Pending Approvals — Benefits Document Filing Page		Image 37	
Benefits Administration (Benefits Utilization Analytics)	PeopleSoft Benefits Administration: Benefits Utilization Dashboard		Image 39	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Attachment Page		Image 41	
Benefits Administration	PeopleSoft Human Resources Manage Base Benefits: Pending Approvals - Dependent Updates Page		Image 41	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Plan Comparison Page		Image 43	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Benefits Administration	PeopleSoft Benefits Administration: Comparison Definition Page		Image 43	
Benefits Administration	PeopleSoft Benefits Administration: Comparison Template Page		Image 43	
Benefits Administration	PeopleSoft Benefits Administration: Comparison Footnote Table page		Image 43	
Benefits Administration	PeopleSoft Benefits Administration: Comparison Plan Data page		Image 43	
Benefits Administration	PeopleSoft Benefits Administration: Benefits Statement Template Page		Image 44	
Benefits Administration	PeopleSoft Benefits Administration: Manage Benefits Tile		Image 44	Image 44 provides access to Manage Benefits tile and dashboard that includes Benefits WorkCenter and analytics.
Benefits Administration	PeopleSoft Benefits Administration: Manage Benefits Home Page		Image 44	
Benefits Administration (Life Events Insights Analytics)	PeopleSoft Benefits Administration: Life Events Insights Dashboard		Image 44	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Benefits Administration (Ben Admin Processing Insights Analytics)	PeopleSoft Benefits Administration: Benefits Admin Processing Insights Dashboard		Image 44	
Benefits Administration (Open Enrollment Insights Analytics)	PeopleSoft Benefits Administration: Open Enrollment Insights Dashboard		Image 46	
Benefits Administration	PeopleSoft Benefits Administration: Generate Benefit Notifications Page		Image 51	

Budgets and Requirements Administration

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Budgets and Requirements Administration products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Health and Safety Dashboard		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - My Incidents Page		Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Welcome Page		Image 36	This page appears if this step is added to the activity guide template used in the incident reporting guided process.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Acknowledgement Page		Image 36	This page appears if this step is added to the activity guide template used in the incident reporting guided process.
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Report Incident Page	PeopleSoft Human Resources Monitor Health and Safety: Incident Details - Incident Page PeopleSoft Human Resources Monitor Health and Safety: Incident Details - Location Page	Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Injury/Illness Page	PeopleSoft Human Resources Monitor Health and Safety: Injury Details - Description Page PeopleSoft Human Resources Monitor Health and Safety: Injury Details - Details Page	Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - People Connected Page	PeopleSoft Human Resources Monitor Health and Safety: Incident Details - People Page	Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Attachments Page		Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Report Incident - Review and Submit Page		Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: View Incident Page	PeopleSoft Human Resources Monitor Health and Safety: Review Employee Injury Summary Page	Image 36	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Pending Approvals - Incident Report Page		Image 36	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
Health and Safety (PeopleSoft Insights)	PeopleSoft Human Resources Monitor Health and Safety: Incident Analytics Dashboard		Image 37	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Vaccinations - Vaccine Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Vaccine Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: View Vaccine Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Test Results - Test Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Test Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: View Test Results Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Allergies - Allergy Details Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Pending Approvals - Vaccinations Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Pending Approvals - Test Results Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Vaccine Attachments Page		Image 40	
Health and Safety	PeopleSoft Human Resources Monitor Health and Safety: Test Attachments Page		Image 40	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
Health and Safety (PeopleSoft Insights)	PeopleSoft Human Resources Monitor Health and Safety: Test Analytics Dashboard		Image 41	
Health and Safety (PeopleSoft Insights)	PeopleSoft Human Resources Monitor Health and Safety: Vaccination Analytics Dashboard		Image 41	

Self-Service Applications

This table lists PeopleSoft delivered Fluid pages that are common to the HCM self service applications and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eBenefits	PeopleSoft eBenefits: Benefits Summary Page		Image 9	
eBenefits (Life Events)	PeopleSoft eBenefits: Life Events Page		Image 9 Image 23	The fluid Life Events page was delivered in image 9, which took you to classic pages to enter your life event changes. Image 23 delivered additional fluid Life Events-related pages to record the event. See also PeopleSoft eBenefits: The Activity Guide Composer Framework for Life Events.
eBenefits (Life Events)	PeopleSoft eBenefits: Welcome to <Transaction Name> Event Page		Image 23	
eBenefits (Life Events)	Life Event Status and Date pages (see PeopleSoft eBenefits: Marital Status or Divorce Status Page and PeopleSoft eBenefits: Birth Date or Adoption Date Page)		Image 23	
eBenefits (Life Events)	PeopleSoft eBenefits: Summary Page		Image 23	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eBenefits (Life Events)	PeopleSoft eBenefits: Pending Approvals — Life Event Page		Image 26	Image 26 delivered an enhancement to the fluid Life Event-page to approve a life event document.
eBenefits (Dependent/ Beneficiary Info)	PeopleSoft eBenefits: Dependent and Beneficiary Information Page	Dependent and Beneficiary Information Page	Image 24	
eBenefits (Affordable Care Act)	PeopleSoft Benefits Administration: View Form 1095-C Page	PeopleSoft eBenefits: View Form 1095-C Page	Image 20	
eBenefits (Affordable Care Act)	PeopleSoft Benefits Administration: 1095-C Delivery Preferences Page		Image 20	
eCompensation Manager Desktop	PeopleSoft eCompensation Manager Desktop: Pending Approvals - Ad Hoc Salary Change Page	PeopleSoft eCompensation Manager Desktop: Approve Ad Hoc Salary Change Page	Image 20	
eDevelopment	PeopleSoft eDevelopment: My Profiles Dashboard		Image 37	
eDevelopment	PeopleSoft eDevelopment: Team Profiles Dashboard		Image 37	
eDevelopment	PeopleSoft eDevelopment: Team Talent Profile - Find Team Member Page (for Managers)	Current Team Profiles - Select Employees to Process Page See also PeopleSoft eDevelopment: (Classic) Maintaining Person Profiles as an Employee or Manager.	Image 26 Image 38	Image 38 enhanced the user interface for selecting team members.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eDevelopment	(Smartphone) Employee Details Page		Image 26 Image 38	As of image 38, the Team Talent Profile feature no longer accesses this page. Instead, the smartphone user selects the More link from the PeopleSoft eDevelopment: Team Talent Profile - Find Team Member Page (for Managers) to expand the section and display additional details.
eDevelopment	PeopleSoft eDevelopment: Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)	My Current Profile Page Current Team Profiles See also PeopleSoft eDevelopment: (Classic) Maintaining Person Profiles as an Employee or Manager.	Image 9 Image 26 Image 55	Image 9 delivered the Talent Profile for the employee. Image 26 delivered the Team Talent Profile for the manager. Image 55 delivers the ability to track non-Talent Profile or non-Team Talent Profile information, such as hobbies, clothing sizes, food preferences, and so forth, by creating new tiles to access and track the data.
eDevelopment	PeopleSoft eDevelopment: Select Profile Type Page		Image 28	
eDevelopment	PeopleSoft eDevelopment: <Content Type> (Item Details) Page	Add New <content type> Page View <content type> Page Update <content type> Page See also PeopleSoft eDevelopment: (Classic) Maintaining Person Profiles as an Employee or Manager.	Image 9 Image 27 Image 46	Image 27 delivered fluid attachment capability. Image 46 displays a Details link that allows you to view content item details as defined in the Content Catalog.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eDevelopment	PeopleSoft eDevelopment: <Related Content Type> (Summary) Page		Image 25	
eDevelopment	PeopleSoft eDevelopment: <Related Content Type> (Details) Page	Related Items Page (see PeopleSoft eDevelopment: (Classic) Maintaining Person Profiles as an Employee or Manager.	Image 25	
eDevelopment	PeopleSoft eDevelopment: View Profile Item History Page	View Historical Items Page (see PeopleSoft eDevelopment: (Classic) Maintaining Person Profiles as an Employee or Manager)	Image 28	
eDevelopment	PeopleSoft eDevelopment: (Fluid) Searching and Comparing Profiles Pages	PeopleSoft eDevelopment: (Classic) Searching and Comparing Profiles Pages	Image 36 Image 40	Image 40 provides the ability to save searches.
eDevelopment	PeopleSoft eDevelopment: My Interest List Page (for Employees) or Team Interest List Page (for Managers)	My Interest List Page Team Interest List Page (See PeopleSoft eDevelopment: Page Used to Maintain Employee Interest Lists Using the Classic User Interface)	Image 37	
eDevelopment	PeopleSoft eDevelopment: My Job Profiles - Select Your Job Profile Page (for Employees)	My Job Profiles Page (See PeopleSoft eDevelopment: Pages Used to View Job Profiles Using the Classic User Interface)	Image 37	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eDevelopment	PeopleSoft eDevelopment: View Job Profiles (for Employees) or Maintain Job Profiles (for Managers) - Search Profiles Page	Select a Profile Page (See PeopleSoft eDevelopment: Pages Used to View Job Profiles Using the Classic User Interface)	Image 37	
eDevelopment	PeopleSoft eDevelopment: My Job Profiles Page (for Employees), View Job Profiles Page (for Employees), and Maintain Job Profiles Page (for Managers)	View Job Profiles Page Maintain Job Profiles Page (See PeopleSoft eDevelopment: Pages Used to View Job Profiles Using the Classic User Interface)	Image 37 Image 41	Image 41 includes the ability for employees to acknowledge their job profile items. It also gives managers the ability to request job profile acknowledgements from employees.
eDevelopment	PeopleSoft eDevelopment: Acknowledgement Status Page		Image 41	
eDevelopment	PeopleSoft eDevelopment: My Job Profiles Page or Job Profiles for <Employee Name> Page		Image 38	
eDevelopment	PeopleSoft eDevelopment: Copy Job Items Page		Image 38	
eDevelopment	PeopleSoft eDevelopment: Profile Item Detail Page		Image 38	
eDevelopment	PeopleSoft eDevelopment: Copy Profile Items Page		Image 38	
eDevelopment (Fluid Approvals)	PeopleSoft eDevelopment: Pending Approvals - Person Profile Page or Pending Approvals - Non-Person Profile Page		Image 25	
eDevelopment (Fluid Approvals)	PeopleSoft eDevelopment: Profile Item Details Page		Image 25 Image 27	Image 27 delivered fluid attachment capability.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
ePay (Global Payroll)	PeopleSoft ePay: Payslips Page	View Payslips See PeopleSoft ePay: Viewing Payslips Online.	Image 9	
ePay (Global Payroll)	PeopleSoft ePay: Payment Summary Page (small form factor only)		Image 14	Includes several secondary pages with details such as earnings, deductions, absence balances, payment distribution, and paycheck analytics.
ePay (Global Payroll)	PeopleSoft ePay: Payslip Analytics Page (small form factor only)		Image 14	
ePay (Global Payroll)	PeopleSoft ePay: Banking Page		Image 22	
ePay (Global Payroll)	PeopleSoft ePay: Bank Accounts Page	PeopleSoft Human Resources Administer Workforce: Maintain Bank Accounts Page	Image 22	
ePay (Global Payroll)	PeopleSoft ePay: Payment Distribution Page	PeopleSoft Global Payroll: Specify Net Pay Elections Page	Image 22	
ePay (Payroll for North America)	PeopleSoft ePay: Paychecks Page	Pay Page See PeopleSoft ePay: Setting Up and Viewing Self-Service Paychecks.	Image 9	
ePay (Payroll for North America)	PeopleSoft ePay: View Paycheck Page (medium and larger form factors)	Pay Page See PeopleSoft ePay: Setting Up and Viewing Self-Service Paychecks.	Image 9	
ePay (Payroll for North America)	PeopleSoft ePay: View Paycheck Page and Paycheque Summary page (small form factor only)	Pay Page and Paycheque Page See PeopleSoft ePay: Setting Up and Viewing Self-Service Paychecks	Image 14	Includes several secondary pages with details such as earnings, taxes, deductions, leave balances, net pay distribution, and paycheck analytics.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Analytics Page (small form factor only)		Image 14	
ePay (Payroll for North America)	PeopleSoft ePay: Tax Withholding Page		Image 18	
ePay (Payroll for North America)	PeopleSoft ePay: Federal Tax Withholding Forms Page		Image 18	
ePay (Payroll for North America)	PeopleSoft ePay: State Tax Withholding Forms Page		Image 18	
ePay (Payroll for North America)	PeopleSoft ePay: Pending Approvals - W-4 Tax Withholding Form Page		Image 25	
ePay (Payroll for North America)	PeopleSoft ePay: W-2/ W-2c Consent Page	W-2/W-2c Consent Form Page See PeopleSoft ePay: Managing Consent for Electronic Year-End Forms	Image 22	
ePay (Payroll for North America)	PeopleSoft ePay: Direct Deposit Page	PeopleSoft ePay: Setting Up and Viewing Direct Deposit	Image 26 image 44	
ePay (Payroll for North America)	PeopleSoft ePay: Reorder Accounts Page		Image 26 image 44	
ePay (Payroll for North America)	PeopleSoft ePay: T4/T4A Consent Form Page	PeopleSoft ePay: Managing Consent for Electronic Year-End Forms	Image 27	
ePay (Payroll for North America)	PeopleSoft ePay: Verify Identity Page		Image 27	
ePay (Payroll for North America)	PeopleSoft ePay: View T4/T4A Slips Page		Image 27	
ePay (Payroll for North America)	PeopleSoft ePay: RL-1/RL-2 Consent Page	PeopleSoft ePay: Managing Consent for Electronic Year-End Forms	Image 27	
ePay (Payroll for North America)	PeopleSoft ePay: View RL-1/RL-2 Slips Page		Image 27	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
ePay (Payroll for North America)	PeopleSoft ePay: View W-2/W-2c Forms Page		Image 28	
ePay (Payroll for North America)	PeopleSoft ePay: Year End Accessibility Page		Image 28	
ePay (Payroll for North America)	PeopleSoft ePay: View <Tax Form or Slip> Page (Screen Reader Mode)		Image 28	
ePay (Payroll for North America)	PeopleSoft ePay: Payroll Dashboard		Image 34	
ePay (Payroll for North America) (Payroll Chatbot)	PeopleSoft ePay: Payroll Assistant Page		Image 36	
ePay (Payroll for North America)	PeopleSoft ePay: Direct Deposit Page		Image 44	
ePay (Payroll for North America)	PeopleSoft ePay: Review Existing Accounts Page		Image 44	
ePay (Payroll for North America)	PeopleSoft ePay: Remaining Balance Account Page		Image 44	
ePay (Payroll for North America)	PeopleSoft ePay: View Pages		Image 46	
ePay (Payroll for North America)	PeopleSoft ePay: Tax Withholding Page		Image 46	
ePay (Payroll for North America)	PeopleSoft ePay: Federal Tax Withholding Forms Page		Image 46	
ePay (Payroll for North America)	PeopleSoft ePay: Pending Approvals - TD1 Tax Withholding Form Page		Image 46	
ePay (Payroll for North America)	PeopleSoft ePay: Provincial Tax Withholding Forms Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: 1042-S Consent Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: View Form 1042-S Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: View Form 1042-S Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: 1099-R Consent Page		Image 47	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
ePay (Payroll for North America)	PeopleSoft ePay: View 1099-R Forms Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: View Form 1099-R Page		Image 47	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Select a Job Page	Paycheck Modeler - Jobs page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Welcome Page	Paycheck Modeler - Start page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Decision Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Earnings Page	Paycheck Modeler - Earnings page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Deductions Page	Paycheck Modeler - Deductions page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Taxes Page	Paycheck Modeler - Taxes page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Model Federal Tax Withholding Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Model State Tax Withholding Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Modeled Local Tax Withholding Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Modeler - Results Page	Paycheck Modeler - Results page	Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Paycheck Details Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: Compare Modeled Check Page		Image 52	
ePay (Payroll for North America)	PeopleSoft ePay: View Modeled Changes Page		Image 52	
ePay (Payroll for North America)	View W-2/W-2c Forms page	View W-2/W-2c Forms - Select Tax Year Page	Image 54	See Also PeopleSoft ePay: Year-End Forms for Administrators.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
ePay (Payroll for North America)	View T4/T4A Slips Page	View T4/T4A Slips - Select Tax Year Page	Image 54	See Also PeopleSoft ePay: Year-End Forms for Administrators.
ePay (Payroll for North America)	View RL-1/RL-2 Slips Page	View RL-1/RL-2 Slips - Select Tax Year Page	Image 54	See Also PeopleSoft ePay: Year-End Forms for Administrators.
eProfile (Career Snapshot)	PeopleSoft eProfile: Career Snapshot - Summary Dashboard		Image 52	
eProfile (Career Snapshot)	PeopleSoft eProfile: Career Snapshot - Career Details Dashboard		Image 52	
eProfile (Career Snapshot)	PeopleSoft eProfile: Career Snapshot - Compensation Dashboard		Image 52	
eProfile (Career Snapshot)	PeopleSoft eProfile: Career Snapshot - Performance Dashboard		Image 52	
eProfile (Career Snapshot)	PeopleSoft eProfile: Career Snapshot - Recognition and Digital Badge Dashboard		Image 55	
eProfile (Personal Details)	PeopleSoft eProfile: Personal Details Dashboard		Image 34 Image 35 Image 50	(USA) Image 35 shows the Action Required message when I-9 information is required for a person working in the U.S. (see PeopleSoft eProfile: Personal Details Tile). Image 50 displays additional messages on the Form I-9 tile to support approvals.
eProfile (Personal Details)	PeopleSoft eProfile: Additional Information Page		Image 9 Image 32	See also PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information. Image 32 displays the business partner information.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile (Personal Details)	PeopleSoft eProfile: Addresses (Summary) Page	Home and Mailing Address Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 46	Image 46 delivers the ability to include other address types based the configuration settings on the Address Type Control Page.
eProfile (Personal Details)	PeopleSoft eProfile: <Type> Address (Detail) Page	Home and Mailing Address Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 27 Image 46	Image 27 delivered fluid attachment capability. Image 46 delivers the ability to include other address types based the configuration settings on the Address Type Control Page.
eProfile (Personal Details)	PeopleSoft eProfile: Business Partners Page		Image 31	
eProfile (Personal Details)	PeopleSoft eProfile: Contact Details Page	Phone Numbers Page Email Addresses Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 46	Image 46 delivers the ability to include other phone and email types based the configuration settings on the Phone Type Control Page and Email Type Control Page.
eProfile (Personal Details)	PeopleSoft eProfile: Emergency Contacts (Summary) Page	Emergency Contacts Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 55	Image 55 delivered the ability to designate emergency contacts for critical situations.
eProfile (Personal Details)	PeopleSoft eProfile: Ethnic Groups Page	Ethnic Groups Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile (Personal Details)	PeopleSoft eProfile: (USA) Form I-9 Page PeopleSoft eProfile: (USA) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation	PeopleSoft eProfile: (Employee) Employment Eligibility Verification Page, Section 1. Employee Information and Attestation	Image 17 Image 50	Image 50 delivers the Employment Eligibility Verification page for employee's I-9.
eProfile (Personal Details)	PeopleSoft eProfile: Marital Status Page	Marital Start Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9	
eProfile (Personal Details)	PeopleSoft eProfile: Name (Summary) Page	Name Change Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 49	Image 49 incorporates new preferred name fields and supports formal and display names.
eProfile (Personal Details)	PeopleSoft eProfile: Name (Detail) Page	Name Change Page See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information.	Image 9 Image 26 Image 49	Image 26 delivered fluid attachment capability. Image 49 incorporates new preferred name fields and supports formal and display names.
eProfile (Personal Details)	PeopleSoft eProfile: Social Media (Summary) Page		Image 30	
eProfile (Personal Details)	PeopleSoft eProfile: Social Media (Detail) Page		Image 30	
eProfile (Personal Details)	PeopleSoft eProfile: Veteran Status Page	PeopleSoft Human Resources Administer Workforce: Veteran Status Page	Image 17	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile (Personal Details)	PeopleSoft eProfile: Disability - Voluntary Self-Identification of Disability Page	Disability - Voluntary Self-Identification of Disability Page (See PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information)	Image 17 Image 35	Image 35 includes the 2020 updates to the Form CC-305 disability data.
eProfile (Personal Details)	PeopleSoft eProfile: Select Photo Page		Image 9	
eProfile (Personal Details)	PeopleSoft eProfile: Gender Identity Page		Image 41	
eProfile (Personal Details)	PeopleSoft eProfile: Gender Details Page		Image 41 Image 42	Image 42 triggers approvals on Gender (Current Sex) value changes only.
eProfile (Matrix Team)	PeopleSoft Human Resources Administer Workforce: Manage Matrix Teams Page		Image 17	
eProfile Manager Desktop (Fluid Approvals)	PeopleSoft eProfile Manager Desktop: Pending Approvals - <Transaction Name> Page		Image 20	Fluid Approvals supports the following eProfile Manager Desktop approval transaction requests that are generated from the following self service pages: *Employee Self Service:* • Address Change • Marital Status Change • Name Change *Manager Self Service:* • Full/Part Time Status • Location Change • Promote Employee • Reporting Change • Retire Employee • Terminate Employee • Transfer Employee

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Fluid Approvals)	PeopleSoft eProfile Manager Desktop: Name Change Details Page		Image 20	
eProfile Manager Desktop (Fluid Approvals)	PeopleSoft eProfile Manager Desktop: Attachments Page		Image 26 Image 27	Image 26 supports for the *Name Change* transaction. Image 27 supports attachments for the *Address Change* transaction.
eProfile Manager Desktop (Fluid Approvals - Gender Identity Change)	PeopleSoft eProfile Manager Desktop: Pending Approvals - Gender Identity Change Page		Image 41 Image 42	Image 42 triggers approvals for Gender (Current Sex) value changes only.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Competencies Page	PeopleSoft eProfile Manager Desktop: Other Pagelets Page	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Licenses and Certifications Page	PeopleSoft eProfile Manager Desktop: Other Pagelets Page	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Projects Page	PeopleSoft eProfile Manager Desktop: Other Pagelets Page	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Document History Page	PeopleSoft eProfile Manager Desktop: Other Pagelets Page	Image 22 Image 30 Image 31	Image 30 supports multiple performance document types. Image 31 supports development history and multiple development document types.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Performance versus Potential Page	PeopleSoft eProfile Manager Desktop: Header Rate Boxes Page	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Risk versus Loss Page	PeopleSoft eProfile Manager Desktop: Header Rate Boxes Page	Image 24	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Succession Options Page	PeopleSoft eProfile Manager Desktop: Other Pagelets Page	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Configure Snapshot - Profile Content Page		Image 32 Image 33	Image 33 supports publishing profile content tiles to all dashboards.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Tile Attributes Page		Image 32 Image 33	Image 33 supports publishing profile content tiles to all dashboards.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Dashboard Tiles Page		Image 33	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager) Team Snapshot - Find Team Member Page		Image 19 Image 38	Image 38 enhanced the user interface for selecting team members.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Administrator) View Snapshot - Search Page		Image 26	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Snapshot - Summary Dashboard		Image 19	See also PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Snapshot - Promotion Readiness Dashboard		Image 19 Image 28	See also PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout. Image 28 provides an interface with the ELM Learning tile and pages.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Snapshot - Compensation Review Dashboard		Image 21	See also PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Snapshot - Performance Review Dashboard		Image 22	See also PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop:Snapshot - Career Planning Dashboard		Image 23	See also PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager (Manager and Administrator) Snapshot - Recognition and Digital Badges Dashboard		Image 55	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Remote Worker Tile		Image 52	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Remote Worker Page		Image 52	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Performance History Page	PeopleSoft eProfile Manager Desktop: Performance History Pagelet as a Graph	Image 19 Image 30	Image 30 supports multiple performance document types.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Compensation: Current Salary Page	PeopleSoft eProfile Manager Desktop: Current Salary Pagelet	Image 20	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Compensation: Salary History Page	PeopleSoft eProfile Manager Desktop: Base Salary History Pagelet	Image 20	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Compensation History Page		Image 19	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Job Details: Job Information Page		Image 19	See also PeopleSoft eProfile Manager Desktop: Talent Summary Page.
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Job Details: Job History Page	PeopleSoft eProfile Manager Desktop: Career History Pagelet	Image 20	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Compensation: Total Rewards Page	PeopleSoft eProfile Manager Desktop: Total Rewards Pagelet	Image 21	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Job Competencies Page	PeopleSoft eProfile Manager Desktop: Job Related Competencies Pagelet	Image 19	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Personal Competencies Page	PeopleSoft eProfile Manager Desktop: Personal Competencies Pagelet	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Licenses and Certifications Page	PeopleSoft eProfile Manager Desktop: Licenses and Certifications Pagelet	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Responsibilities Page	PeopleSoft eProfile Manager Desktop: Responsibilities Pagelet	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Honors and Awards Page	PeopleSoft eProfile Manager Desktop: Honors and Awards Pagelet	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Job Interests Page	PeopleSoft eProfile Manager Desktop: Interest List Pagelet	Image 23	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Development History Page		Image 31	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Education Page	PeopleSoft eProfile Manager Desktop: Education Pagelet	Image 23	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Career Plans Page	PeopleSoft eProfile Manager Desktop: Career Planning Pagelet	Image 23	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Job History Page	PeopleSoft eProfile Manager Desktop: Career History Pagelet	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Employee Impact Page	See PeopleSoft eProfile Manager Desktop: Talent Summary Page	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: E&G Special Projects Page	PeopleSoft eProfile Manager Desktop: (E&G) E&G Special Projects Pagelet	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Succession Plans Page	PeopleSoft eProfile Manager Desktop: Succession Options Pagelet	Image 24	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Special Projects Page	PeopleSoft eProfile Manager Desktop: Special Projects Pagelet	Image 22	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Recognitions (Summary) Tile		Image 52	
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: Recognitions Page		Image 52	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (Snapshot)	PeopleSoft eProfile Manager Desktop: <Content Type> Page		Image 32 Image 33	Image 32 supports adding configurable tiles and pages to the Summary dashboard. Image 33 supports adding configurable tiles and pages to non-summary dashboards.
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Update Team Information Page		Image 24	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: <Transaction Name> - Find Team Member Page for Selecting Employees		Image 9 Image 11 Image 12 Image 20 Image 21 Image 24	Fluid pages for guided self-service were delivered in Image 9. Configurations for specific guided self-service transactions have been delivered in multiple images: • Image 9: *Change Full/Part Time Status, Promote Employee, Request Ad Hoc Salary Change, Transfer Employee* • Image 11: *Request Location Change, Request Reporting Change* • Image 12: *Retire Employee, Terminate Employee* • Image 20: *Demote Employee* Image 21: *Request Paid Leave of Absence, Request Leave of Absence* • Image 24: *Update Job Details for Group*
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Questionnaire Page		Image 9	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Decision Support Page (PeopleTools 8.55 or later)		Image 9	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Work and Job Information Page		Image 9	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Compensation Details Page		Image 9	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Clone Position Page		Image 22	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Review and Submit Page		Image 9	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: (Fluid) Pending Approvals - <Transaction Name> Page (for Guided Self-Service Approvals)		Image 20 Image 52	Image 52 enables the final approver to edit Clone Position transaction requests.
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Salary Change Details Page (for fluid approvals)		Image 20	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Salary Grade Information Page (for fluid approvals)		Image 20	
eProfile Manager Desktop (guided self-service)	PeopleSoft eProfile Manager Desktop: Attachments Page (for fluid approvals)		Image 20	
eProfile Manager Desktop (My Team)	PeopleSoft eProfile Manager Desktop: Select Manager Page		Image 17	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (My Team)	PeopleSoft eProfile Manager Desktop: My Team – Summary Page	See PeopleSoft eProfile Manager Desktop: Viewing the Manager Dashboard Pagelets and PeopleSoft eProfile Manager Desktop: Pages Used to View Personal Information.	Image 9 Image 32 Image 45 Image 50	In image 32, administrators can configure the My Team pages to show or hide pages. See PeopleSoft eProfile Manager Desktop: Configure My Team Pages Page. Image 45 includes remote work information under today's status. Image 50 enables managers to request position updates for empty positions.
eProfile Manager Desktop (My Team)	PeopleSoft eProfile Manager Desktop: My Team – Performance Page	See PeopleSoft eProfile Manager Desktop: Viewing the Manager Dashboard Pagelets and PeopleSoft eProfile Manager Desktop: Pages Used to View Personal Information.	Image 9 Image 26 Image 32	In image 26, this page can be secured separately from the other My Team pages. In image 32, administrators can configure the My Team pages to show or hide pages. See PeopleSoft eProfile Manager Desktop: Configure My Team Pages Page.
eProfile Manager Desktop (My Team)	PeopleSoft eProfile Manager Desktop: My Team – Compensation Page	See PeopleSoft eProfile Manager Desktop: Viewing the Manager Dashboard Pagelets and PeopleSoft eProfile Manager Desktop: Pages Used to View Personal Information.	Image 9 Image 26 Image 32	In image 26, this page can be secured separately from the other My Team pages. In image 32, administrators can configure the My Team pages to show or hide pages. See PeopleSoft eProfile Manager Desktop: Configure My Team Pages Page.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid page Delivered	Comments
eProfile Manager Desktop (My Team)	PeopleSoft eProfile Manager Desktop: My Team – Leave Balances Page	See PeopleSoft eProfile Manager Desktop: Viewing the Manager Dashboard Pagelets and PeopleSoft eProfile Manager Desktop: Pages Used to View Personal Information.	Image 9 Image 26 Image 32	In image 26, this page can be secured separately from the other My Team pages. In image 32, administrators can configure the My Team pages to show or hide pages. See PeopleSoft eProfile Manager Desktop: Configure My Team Pages Page.
eProfile Manager Desktop (My Team - Analytics)	PeopleSoft eProfile Manager Desktop: Performance vs. Compa-Ratio Pivot Grid		Image 18	
eProfile Manager Desktop (Fluid Approvals - Matrix Team)	PeopleSoft Human Resources Administer Workforce: Pending Approvals - Matrix Team Page		Image 20	

Time and Pay

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Time and Pay products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Absence Management	PeopleSoft Absence Management: Extended Absence Request Page	PeopleSoft Absence Management: Request Absence Page	Image 9	
Absence Management	PeopleSoft Absence Management: View Requests Page	PeopleSoft Absence Management: Absence Request History Page	Image 9	
Absence Management	PeopleSoft Absence Management: Absence Details Page	PeopleSoft Absence Management: Request Details Page	Image 9	
Absence Management	PeopleSoft Absence Management: Balances Page	PeopleSoft Absence Management: View Absence Balances Page	Image 9	
Absence Management	PeopleSoft Absence Management: Cancel Absences Page	PeopleSoft Absence Management: Cancel Absence Page	Image 19	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Pending Approvals - Absence Request Page		Image 20	
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Pending Approvals - Cancel Absence Page		Image 20	
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Absence Exceptions Page		Image 22	
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Pending Approvals — Leave Donations Page		Image 23	
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Extended Absence Request Page		Image 27	Image 27 supports attachments for the request absence and cancel absence. The Employee can attach the request document for absence using Fluid Attachment feature.
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Pending Approvals - Absence Request Page		Image 28	
Absence Management Employee Navigation for Absence Transaction	PeopleSoft Absence Management: Time Home Page		Image 29	Actionable tile are added under tile for Absence transactions.
Absence Management (Self Service Delegation for Fluid)	PeopleSoft Absence Management: Extended Absence Request Page		Image 29	Image 29 supports the delegation facility for employees to do absence transactions.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Absence Management (Fluid Approvals)	PeopleSoft Absence Management: Pending Approvals - Extended Absence		Image 29	Image 29 supports the feature for managers to approve the extended absences reported.
Absence Management Absence Assistant (Absence Management Chatbot) Digital Assistant uptake Absence Bot	PeopleSoft Absence Management: Understanding Absence Assistant PeopleSoft Absence Management: Communicating with Absence Assistant		Image 31 Image 38	Image 31 supports Absence Assistant tile to access Absence Chatbot to provide help with absence related tasks and queries. Image 38 provided an enhancement to the existing workflows: Absence Assistant Chatbot uptake.
Absence Management (Extended Absence Request Tile)	PeopleSoft Absence Management: Extended Absence Request Tile		Image 31	Image 31 delivered an Extended Absence Request Tile under Employee Self Service and Extended Absence Self Service feature to create and maintain extended absence requests using Fluid with the help of activity guide framework to include employee eligibility information and supporting documents.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Absence Management Request Absence Page Attachment Framework with Multiple Entry ID and Configuration ID	PeopleSoft Absence Management: Manage Absences Page		Image 31	Image 31 enable Request Absence page to include a document grid using which employee can attach the documents according to its Type and Category.
Absence Management Attachments - Enhanced View of Types and Categories	PeopleSoft Absence Management: Manage Absences Page Configure Keys Page		Image 32	The HCM Fluid Attachment framework adds a new option enabling employees, managers, and administrators to view the document type and category of an attachment and to view all attachments at once.
Absence Management	PeopleSoft Absence Management: Accumulators Comments Modal PeopleSoft Absence Management: Adjust Balance Comments Modal		Image 36	Added Comments functionality to Accumulator & Balance Adjustment transactions.
Absence Management (Fluid Time to follow Absence Workflow)	PeopleSoft Time and Labor: Setting Up System Defaults and Loading Dates PeopleSoft Time and Labor: Using PeopleSoft Fluid User Interface for Time Reporting as an Employee		Image 37	Enhanced the Fluid Enter Time feature to support approval routing as per the definition ID in Absence Management.
Absence Management (PeopleSoft Insights)	PeopleSoft Absence Management: Absence Event Insights Dashboard		Image 38	This feature provides a dashboard of Absence analytics for administrators using PeopleSoft Insights application.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Absence Management (PeopleSoft Insights)	PeopleSoft Absence Management: Processed Absence Insights Dashboard		Image 44	This feature provides a dashboard of processed absence analytics for administrators.
Absence Management (Manager Self Service - Team Calendar)	PeopleSoft Absence Management: Setup for Absence Calendar PeopleSoft Absence Management: Team Calendar Tile		Image 41	Manager Self Service (MSS) Team Calendar to provide managers at-a-glance display of team events.
Absence Management (Team Time Nav collection retain the context across Absence Mgmt Pages)	PeopleSoft Absence Management: Team Time Page		Image 42	Added the ability to retain the employee's context when switching between Absence transactions within the Team Time navigation collection in Manager Self Service (MSS).
Absence Management (Employee Self Service - Employee Calendar)	PeopleSoft Absence Management: Calendar Tile		Image 42	Employee Self Service (ESS) Employee Calendar helps employees to view peer events at one place.
Payroll for North America	PeopleSoft Payroll for North America: U.S. Payroll WorkCenter Page	PeopleSoft Payroll for North America: Payroll WorkCenter Page	Image 28	
Payroll for North America	PeopleSoft Payroll for North America: Canadian Payroll WorkCenter Page	PeopleSoft Payroll for North America: Payroll WorkCenter Page	Image 30	
Payroll for North America	PeopleSoft Payroll for North America: Payroll Insights Dashboard		Image 41	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: Canada Payroll Cost Analytics Dashboard		Image 39	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: U.S. Payroll Cost Insights Dashboard		Image 39	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: Canada Payroll Operations Analytics Dashboard		Image 41	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: U.S. Payroll Operations Analytics Dashboard		Image 41	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Dashboard PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Breakdown Dashboard		Image 43	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Dashboard PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Breakdown Dashboard		Image 43	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: U.S. Year-End Trends Dashboard		Image 50	
Payroll for North America (PeopleSoft Insights)	PeopleSoft Payroll for North America: U.S. Year-End Audit Dashboard		Image 50	
Time and Labor (Employee Self Service)	PeopleSoft Time and Labor: Report Time Page for Elapsed Time Reporter	PeopleSoft Time and Labor: Timesheet Page	Image 9	
Time and Labor (Employee Self Service)	PeopleSoft Time and Labor: Payable Time Page		Image 9	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor (Employee Self Service)	PeopleSoft Time and Labor: Weekly Time Page		Image 9	
Time and Labor (Employee Self Service)	PeopleSoft Time and Labor: Leave / Comp Time Tile		Image 31	Image 31 supports the Leave and Comp Balances feature for enhanced visibility to display leaves administered in Base Benefits and Comp time in Time and Labor.
Time and Labor (Employee Self Service)	PeopleSoft Time and Labor: Leave / Comp Time Page		Image 9	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Select Employee Page		Image 22	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Manage Exceptions Page		Image 14	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Reporting Locations Page		Image 16	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Workforce Availability Page		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Scheduled Daily Page		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: No Show Daily Pages		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Schedule Deviation Daily Pages		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Not Scheduled Daily Page		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Elapsed Daily Page		Image 17	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Away From Work Daily Category		Image 17	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Unapproved Absence Daily Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Approved Absence Daily Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Training Daily Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Comp Time Off Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Weekly Time Views		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Workforce Availability - Scheduled Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Schedule Deviation Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Away From Work Daily Category		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Unapproved Absence Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Approved Absence Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Training Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Comp Time Off Weekly Page		Image 18	
Time and Labor (Manager Self Service)	PeopleSoft Time and Labor: Generate Absence Payable Time Page		Image 22	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor Overtime Request Approval	PeopleSoft Time and Labor: Pending Approvals - Overtime Request	PeopleSoft Time and Labor: Working with Time and Labor Dashboard PeopleSoft Time and Labor: Requesting Overtime	Image 24	
Time and Labor Bulk Auto Enrollment	PeopleSoft Time and Labor: Setting Up Enrollment Group		Image 24	
Time and Labor (Fluid Approvals – Payable Time)	PeopleSoft Time and Labor: Pending Approvals_Payable Time Page	PeopleSoft Time and Labor: Working with Time and Labor Dashboard PeopleSoft Time and Labor: Approve Payable Time Page	Image 25	Fluid Approvals supports the following approval transactions for Time and Labor: • Reported Time • Overtime Request • Payable Time
Time and Labor (Fluid Approvals –Overtime Request)	PeopleSoft Time and Labor: Pending Approvals_Payable Time Page		Image 26	
Time and Labor (Fluid Approvals - Elapsed Time Reporting)	PeopleSoft Time and Labor: Pending Approval- Reported Time	PeopleSoft Time and Labor: Approving Reported Time	Image 27	
Time and Labor (Fluid Timesheet Folder)	PeopleSoft Time and Labor: Enter Time Tile	PeopleSoft Time and Labor: Reporting Time PeopleSoft Time and Labor: Reporting Time Rapidly	Image 25	The Timesheet group folder contains **Enter Time**, **View Time Summary**, **View Exceptions** and Setup Quick-Fill.
Time and Labor (Setup Quick-Fill)	PeopleSoft Time and Labor: Setup Quick-Fill Page		Image 26	
Time and Labor (Schedule Change Limits)	PeopleSoft Time and Labor: Schedule Detail Page PeopleSoft Time and Labor: Assign Work Schedule Page		Image 26	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — Fluid Timesheet Hourly for Tablet and Desktop Hourly Time Reporters — Enter Time Page Expand Time Details on Timesheet	PeopleSoft Time and Labor: Enter Time Page for Elapsed Time Reporter		Image 27 Image 34	Image 27 delivered Enter Time page for Time Reporters (Elapsed and Punch) for easily report time using Quick-Fill Facility. Image 34 Added the Time Details Expansion feature for employees to view the time details expanded on elapsed and punch timesheets.
Time and Labor — Fluid Timesheet SFF (Punch, Elapsed and Hourly)	PeopleSoft Time and Labor: (Smartphone) Weekly Time Review Page		Image 27	The Time reporters (Punch, Elapsed or Hourly) can report time for a week in one transaction using smart phone.
Time and Labor — Manager Self Service Fluid Timesheet Navigation Collection	PeopleSoft Time and Labor: Team Time Navigation Collection		Image 28	Image 28 delivered the Manager Self Service navigation collection with Enter Time, Report Time Weekly Time Entry and Weekly Time Summary with employee search pages and further time entry pages navigation.
Time and Labor — Manager Self Service Fluid Timesheet Navigation Collection	PeopleSoft Time and Labor: Select Employee Page		Image 28	
Time and Labor — Manager Self Service Fluid Timesheet Navigation Collection	PeopleSoft Time and Labor: Report Time Select Employee Filters page		Image 28	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — Manager Self Service Fluid Timesheet Navigation Collection	PeopleSoft Time and Labor: Weekly Time Entry page		Image 28	
Time and Labor — Manager Self Service Fluid Timesheet Navigation Collection	PeopleSoft Time and Labor: Weekly Time Summary page		Image 28	
Time and Labor — Actionable Tiles	PeopleSoft Time and Labor: Time Collection — Actionable Tiles		Image 29	Image 29 delivered employee navigation for Time and Labor transactions.
Time and Labor — Reported Time Archival	PeopleSoft Time and Labor: Delivered Data Archive Templates		Image 31	Image 31 delivered the facility to archive Reported Time Approval data for future reference.
Time and Labor — Reported Time Audit	PeopleSoft Time and Labor: Reported Time Audit Page Page Used as the Workforce Administrator Homepage		Image 31	Image 31 delivered Time and Labor tile under Workforce Administration to easily access employees reported time audit data with current and history expandable view.
Time and Labor — Attendance Violation	PeopleSoft Time and Labor: Attendance Violations page		Image 31	Image 31 enhanced the Fluid Attendance Violations feature in Time and Labor to show the violation up-front in Enter Time page using icons.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — Current Pay Period Timesheet Lockdown	PeopleSoft Time and Labor: Timesheet Lockdown Page		Image 32	The Current Pay Period Timesheet Lockdown feature allows an administrator to lock timesheets for current and previous pay periods based on Pay Group.
Time and Labor — Update of Reported Totals on Fluid Time Page after Save or Submit	PeopleSoft Time and Labor: Enter Time Page for Elapsed Time Reporter		Image 32	Image 32 introduced a new setting in Time and Labor that allows customers to defer the update of reported time hours until the time is either saved or submitted on both Employee and Manager Self Service pages.
Time and Labor —Fluid Payable Time Total by Units Real Time	PeopleSoft Time and Labor: Select Employee Page		Image 32	Image 32 updated the Manager Payable Time and View Payable Time pages to display the quantity of time in units.
Time and Labor — Small Form Factor Time Reporting Comments	PeopleSoft Time and Labor: Time Reporting Comments Page		Image 33	The Report Time page is enabled with a group box that allows to view the comments entered for a time on a mobile.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — Reported Time Units Employee Context Preservation for Team Time - TL Pages	PeopleSoft Time and Labor: Team Time Tile PeopleSoft Time and Labor: Report Time Select Employee Filters page		Image 35 Image 42	The Enter Time and Time Summary pages are enabled with displaying reported time units other than hours on the header level, day level and footer level. Image 42 added the ability to retain the employee's context when switching between Absence transactions within the Team Time navigation collection in Manager Self Service (MSS).
Time and Labor — Fluid WorkCenter	PeopleSoft Time and Labor: Time and Labor Fluid WorkCenter Page PeopleSoft Time and Labor: Time and Labor WorkCenter Page		Image 35	The Time Administrators and Managers can use the Fluid Time and Labor WorkCenter to easily access the Time and Labor process at one place.
Time and Labor — ChartFields	PeopleSoft Time and Labor: Report Time Page for Elapsed Time Reporter PeopleSoft Time and Labor: Weekly Time Page		Image 35	Time and Labor pages for Report Time, Entry Time and Weekly Time Entry are enabled with ChartField reporting using combination code and speed types.
Time and Labor — Pre-population of Weekly Time Entry	PeopleSoft Time and Labor: Weekly Time Page		Image 36	The table represents the honor of the user preferences and shows the desired option pre-populated in the weekly time entry page drop-down list.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — ChartField — Time summary page Filter	PeopleSoft Time and Labor: Time Summary Page		Image 36	The Combo code and ChartFields are available for selection using the filters. The time summary detail footer will display the respective combo code or chartfield values wherever available.
Time and Labor — Add Effective Date to Value Lists	PeopleSoft Time and Labor: Setting Up System Defaults and Loading Dates PeopleSoft Time and Labor: Creating Value Lists		Image 37	Enhanced Time and Labor Rules to support effective date for value list.
Time and Labor (PeopleSoft Insights)	PeopleSoft Time and Labor: Reported Time Insight Dashboard		Image 38	Delivered the Time and Labor Reported Time Analytics Dashboard created using PeopleSoft Insights analytics.
Time and Labor — Fluid Manage Time Reporter Data	PeopleSoft Time and Labor: Managing Time Enrollments Using Fluid	PeopleSoft Time and Labor: Entering and Maintaining Time Reporter Data	Image 39	Enhanced Fluid Manage Time Reporter Data to enable administrators to search, create and manage enrollments in Time and Labor through a single navigation and with ease
Time and Labor — Fluid Manage Schedule	PeopleSoft Time and Labor: Managing Schedules Using Fluid	PeopleSoft Time and Labor: Managing Schedules	Image 40	Added the Fluid Manage Schedule feature that enables administrators and managers to assign and manage schedules in Time and Labor.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — Preferences	PeopleSoft Time and Labor: Schedule Preferences Page		Image 42	Time and Labor user preferences. Users will be able to set their preferences from the fluid My Preferences option and have them reflect on their fluid time reporting pages.
Time and Labor — MSS Schedule - Override, Swap and Replace Option Enhancements	PeopleSoft Time and Labor: Override Schedules Page		Image 42	Enhanced the schedule management functionality using fluid to include Override Schedules. Enhanced Replace and Swap actions to facilitate time tracking and set punch sequences using schedule calendar.
Time and Labor (PeopleSoft Insights)	PeopleSoft Time and Labor: Payable Time Insights Dashboard PeopleSoft Time and Labor: Payable Time Trend Dashboard		Image 42	Delivered the Payable Time Trend and Payable Time Insights dashboards created using PeopleSoft Insights. These dashboards enable administrators to view visualizations for payable time data based on the Payable Time index, which can be enabled for real time indexing.

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Time and Labor — ESS Request Schedule Change	PeopleSoft Time and Labor: Managing Schedules Using Fluid for Employees		Image 44	Added the Employee Self Service Schedule feature that enables employees to Trade their Shift or Give up their Shift in Time and Labor.
Time and Labor — Manage Quick-Fill Dashboard	PeopleSoft Time and Labor: Manage Quick-Fill Dashboard		Image 52	Enhanced the Quick Fill feature, which enables the administrators to control the availability of quick fill options for time reporters according to their qualifications. Administrators can effortlessly add or remove these options, ensuring that time reporters have access only to the relevant values.

Global Payroll

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Global Payroll products and business processes:

Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Global Payroll	PeopleSoft Global Payroll: My GP Work Area Settings Page		Image 15	
Global Payroll	PeopleSoft Global Payroll: Global Payroll Calendar Groups Page		Image 15	
Global Payroll	PeopleSoft Global Payroll: Payroll Work Items Page		Image 15	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Global Payroll	PeopleSoft Global Payroll: <Work Item> Page		Image 15	
Global Payroll	PeopleSoft Global Payroll: Global Payroll Analytics Page		Image 15	
Global Payroll	PeopleSoft Global Payroll: Element Browser Page		Image 17	
Global Payroll	PeopleSoft Global Payroll: Payroll Reports Page		Image 25	
Global Payroll	PeopleSoft Global Payroll: Global Payroll Dashboard		Image 26	
Global Payroll	PeopleSoft Global Payroll: Global Payroll WorkCenter Page		Image 28	
Global Payroll	PeopleSoft Global Payroll: Global Payroll Dashboard		Image 34	
Global Payroll (Global Payroll Chatbot)	PeopleSoft Global Payroll: Understanding Global Payroll Assistant		Image 36	
Global Payroll	PeopleSoft Global Payroll: Viewing Global Payroll Insights		Image 39	
Global Payroll (PeopleSoft Insights)	PeopleSoft Global Payroll: Global Payroll Insights (Cost Analytics) Dashboard		Image 39	
Global Payroll (PeopleSoft Insights)	PeopleSoft Global Payroll: Global Payroll Operations Dashboard		Image 40	
Global Payroll (PeopleSoft Insights)	PeopleSoft Global Payroll: Global Payroll Trends Dashboard		Image 42	
Global Payroll	PeopleSoft Global Payroll: Element Trace Viewer Page		Image 48	

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Application / Product	Fluid Page	Classic Page (Replaced or Counterpart)	Image Fluid Page Delivered	Comments
Global Payroll	PeopleSoft Global Payroll: Formula Designer - Definition Page		Image 51	

Recruiting Solutions

This table lists PeopleSoft delivered Fluid pages that are common to the HCM Recruiting Solutions products and business processes:

Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: Open Jobs Page		Image 9	
Candidate Gateway	PeopleSoft Candidate Gateway: Explore Jobs Page		Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: New User Registration Page	PeopleSoft Candidate Gateway: Register Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Terms and Conditions Page		Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Sign In Page	PeopleSoft Candidate Gateway: Sign In Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Reset Password Page	PeopleSoft Candidate Gateway: Registration Update Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Registration Update Page	PeopleSoft Candidate Gateway: Registration Update Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Forgot User Name Page	PeopleSoft Candidate Gateway: Forgot User Name Page	Image 18	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Candidate Gateway	PeopleSoft Candidate Gateway: Forgot Password Page	PeopleSoft Candidate Gateway: Forgot Password Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Password Reset Page	PeopleSoft Candidate Gateway: Password Reset Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: My Account Information Page	PeopleSoft Candidate Gateway: My Account Information Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: My Contact Information Page	PeopleSoft Candidate Gateway: My Contact Information Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Change Password Page	PeopleSoft Candidate Gateway: Change Password Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Change Secret Question Page	PeopleSoft Candidate Gateway: Change Secret Question Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Add/Edit Email Page		Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Add/Edit Phone Page		Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Search Jobs Page	PeopleSoft Candidate Gateway: Job Search Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Job Description Page	PeopleSoft Candidate Gateway: Job Description Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Save Search Page	PeopleSoft Candidate Gateway: Save Search Page	Image 18	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Candidate Gateway	PeopleSoft Candidate Gateway: My Saved Searches Page	PeopleSoft Candidate Gateway: My Saved Searches Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Edit Saved Search Page	PeopleSoft Candidate Gateway: Edit Search Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: My Favorite Jobs Page	PeopleSoft Candidate Gateway: My Favorite Jobs Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Email Job Page	PeopleSoft Candidate Gateway: Send Email Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Start Page	PeopleSoft Candidate Gateway: Start Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Terms and Conditions Page		Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Prequalify Page	PeopleSoft Candidate Gateway: Prequalify Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Prequalify Results Page	PeopleSoft Candidate Gateway: Prequalify Results Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Resume Page	PeopleSoft Candidate Gateway: Resume Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Use Existing Resume Page	PeopleSoft Candidate Gateway: Use Existing Resume Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Copy & Paste Resume	PeopleSoft Candidate Gateway: Copy & Paste Resume Page	Image 18	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: <Step Name> Page	PeopleSoft Candidate Gateway: <Step Name> Page	Image 18	The sections on this page are controlled by the resume template. The Fluid version of the page supports all the same sections as the classic version of the page.
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit Attachment Page	PeopleSoft Candidate Gateway: Add Attachment Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: (USF) Add/Edit Priority Placement Page	PeopleSoft Candidate Gateway: Priority Placement Page	Image 19	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit Work Experience Page	PeopleSoft Candidate Gateway: Work Experience Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit Job Training Page	PeopleSoft Candidate Gateway: Job Training Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit <Profile Content Type> Page	PeopleSoft Candidate Gateway: <Profile Content Type> Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit Reference Page	PeopleSoft Candidate Gateway: Reference Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: (NIR) Community Background Page	PeopleSoft Candidate Gateway: (NIR) Community Background Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: (USA) Disability Page	PeopleSoft Candidate Gateway: (USA) Disability Page	Image 18	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: (USA) Veteran Page	PeopleSoft Candidate Gateway: Veteran Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: (USA) Diversity Page	PeopleSoft Candidate Gateway: (USA) Diversity Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Add/Edit Ethnic Group		Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Review and Submit Page	PeopleSoft Candidate Gateway: Review/Submit Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: My Contact Information Page	PeopleSoft Candidate Gateway: My Contact Information Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Application Confirmation Page	PeopleSoft Candidate Gateway: Application Confirmation Page	Image 18	
Candidate Gateway (job application)	PeopleSoft Candidate Gateway: Application Summary Page	PeopleSoft Candidate Gateway: Application Summary Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: My Job Notifications Page	PeopleSoft Candidate Gateway: My Notifications Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: My Job Applications Page	PeopleSoft Candidate Gateway: My Activities Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Resume Page (from the My Job Applications page)	PeopleSoft Candidate Gateway: Resume Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Add/Edit Attachment Page (from the My Job Applications page)	PeopleSoft Candidate Gateway: Add/Edit Attachment Page	Image 18	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Candidate Gateway	PeopleSoft Candidate Gateway: Applicant References Page	PeopleSoft Candidate Gateway: Applicant References Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Interview Details Page	PeopleSoft Candidate Gateway: Interview Details Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Job Offer Page	PeopleSoft Candidate Gateway: Job Offer Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Job Offer Note Page	PeopleSoft Candidate Gateway: Offer Attachment Note Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Document Description Page	PeopleSoft Candidate Gateway: Document Description Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Send Notification to Recruiter Page	PeopleSoft Candidate Gateway: Send Notification to Recruiter Page	Image 18	
Candidate Gateway	PeopleSoft Candidate Gateway: Refer Friend - Resume Page	PeopleSoft Candidate Gateway: Refer Friend - Resume Page	Image 19	
Candidate Gateway	PeopleSoft Candidate Gateway: Refer Friend - Contact Details Page	PeopleSoft Candidate Gateway: Refer Friend Contact Details Page	Image 19	
Candidate Gateway	PeopleSoft Candidate Gateway: Referral Confirmation Page	PeopleSoft Candidate Gateway: My Referrals Page	Image 19	
Candidate Gateway (Recruiting Solutions Chatbot)	PeopleSoft Candidate Gateway: Communicating with Recruiting Digital Assistant		Image 37	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: My Job Openings Page	PeopleSoft Talent Acquisition Manager: My Job Openings (Classic)	Image 26	
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: My Applicants Page	PeopleSoft Talent Acquisition Manager: My Applicants Pagelet	Image 26	
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: My Interviews Page	PeopleSoft Talent Acquisition Manager: Today's Interviews Pagelet	Image 26	
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: Recruiting Alerts Page	PeopleSoft Talent Acquisition Manager: My Alerts Pagelet	Image 26	
Talent Acquisition Manager	PeopleSoft Talent Acquisition Manager: Recruiting Manager Summary Page	PeopleSoft Talent Acquisition Manager: Recruiting Manager Summary Pagelet	Image 26	
Talent Acquisition Manager (job opening approvals)	PeopleSoft Talent Acquisition Manager: Job Opening Page for Fluid Approvals		Image 20	
Talent Acquisition Manager (job opening approvals)	PeopleSoft Talent Acquisition Manager: Additional Details Page		Image 20	
Talent Acquisition Manager (job opening approvals)	PeopleSoft Talent Acquisition Manager: Posting Destinations Page		Image 20	
Talent Acquisition Manager (job offer approvals)	PeopleSoft Talent Acquisition Manager: Job Offer Page for Fluid Approvals		Image 20	
Candidate Application Status	PeopleSoft Candidate Gateway: Candidate Application Status Page		Image 28	

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Product	Fluid Page	Classic Page (replaced or counterpart)	Image Fluid Page Delivered	Comments
Talent Acquisition Manager (PeopleSoft Insights)	PeopleSoft Talent Acquisition Manager: Application Details Insights Dashboard		Image 34	
Talent Acquisition Manager (PeopleSoft Insights)	PeopleSoft Talent Acquisition Manager: Recruiter Pipeline Dashboard		Image 41	
Talent Acquisition Manager (PeopleSoft Insights)	PeopleSoft Talent Acquisition Manager: Recruitment Admin Dashboard		Image 41	

Using the Employee Self-Service Homepage

This topic describes the delivered homepage for Employee Self Service.

Page Used as the Employee Self Service Homepage

Page Name	Definition Name	Usage
Employee Self Service Homepage	HC_HR_SELF_SERVICE_GBL (this is the cref for the homepage)	Access a variety of employee self-service transactions.

Employee Self Service Homepage

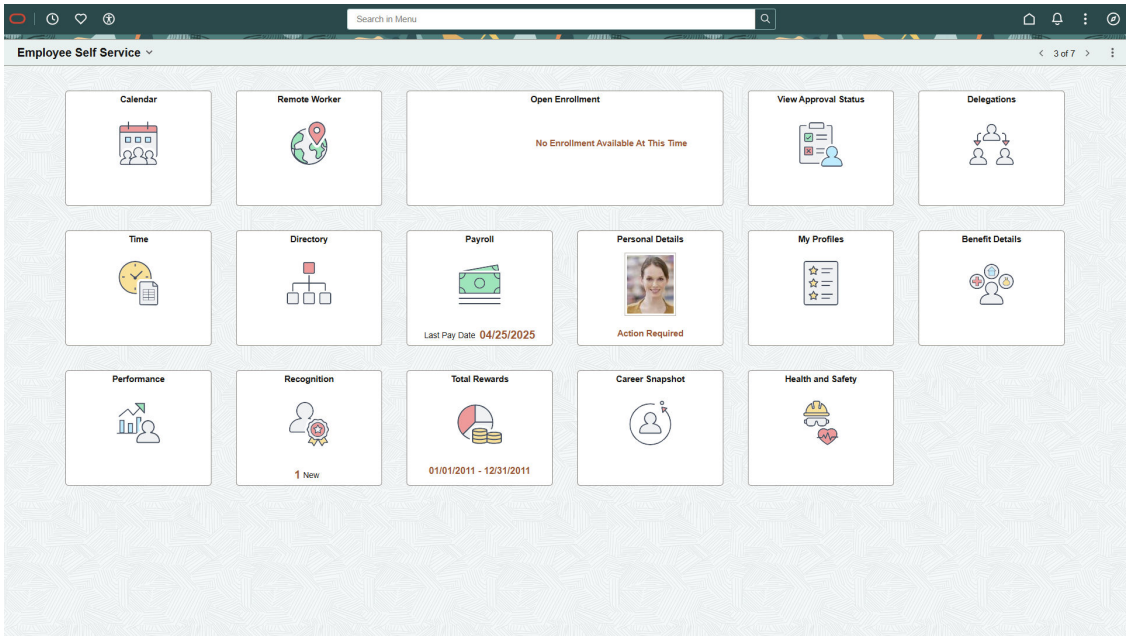
Use the Employee Self Service homepage to access a variety of employee self-service transactions. The cref for this homepage is HC_HR_SELF_SERVICE_GBL.

Navigation:

When you first sign in, the default homepage title appears at the top of the homepage. If the Employee Self Service homepage is not your default homepage, tap the title of the default homepage and select Employee Self Service from the list that appears.

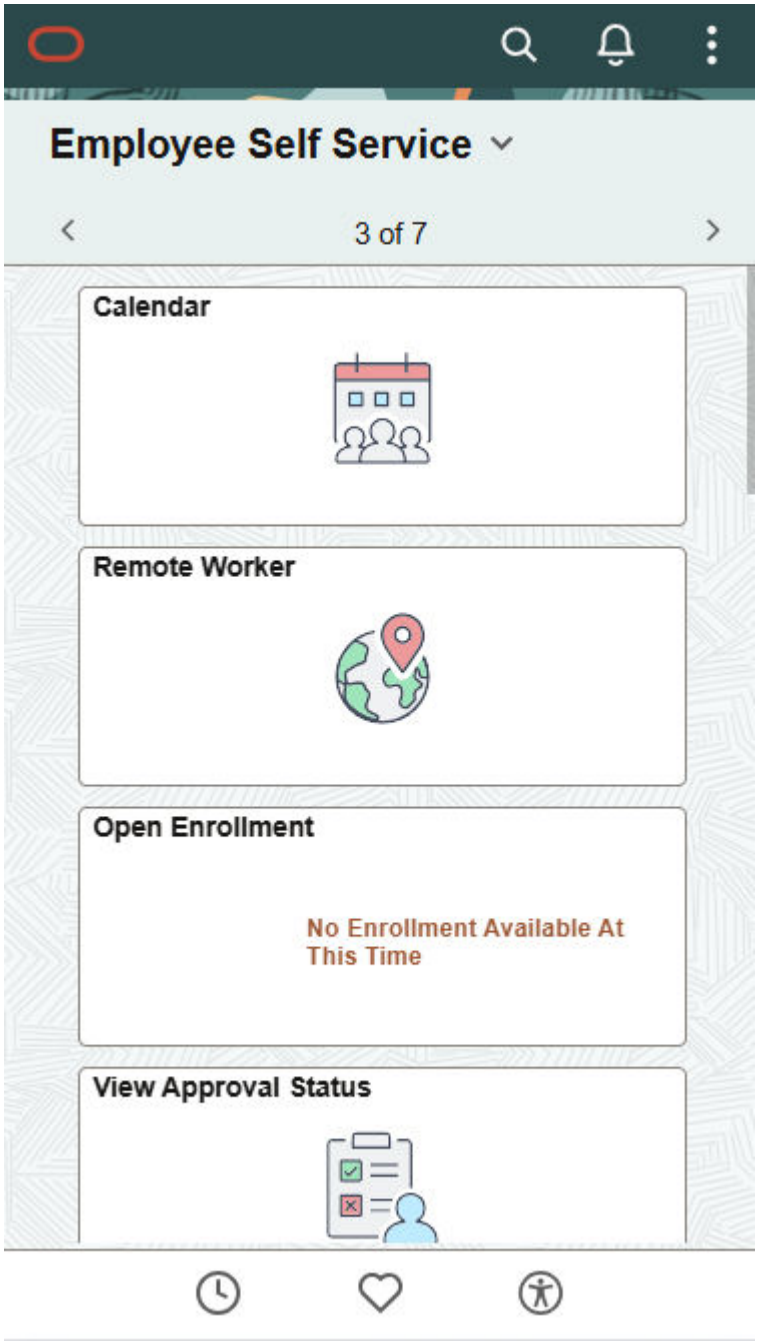
This example illustrates the Employee Self Service homepage.

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This example illustrates the Employee Self Service homepage for the smartphone. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

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PeopleSoft HCM Tiles on the Employee Self Service Homepage

The following table describes the tiles on the delivered Employee Self Service homepage. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to Fluid Transactions and Conditional Navigation when the user is in fluid mode.

Tiles are listed in alphabetical order. On the homepage, users can personalize the tile order.

Use the links in the table to access complete documentation for each transaction.

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Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft ePay: Banking Tile	Access the Banking page, where you can review and manage bank account and payment distribution information.	Pages found under the **Self Service**, and then **Payroll and Compensation** menu: • Personal Bank Accounts • Pay Distribution Instructions
PeopleSoft eBenefits: Benefit Details Tile	View a current benefits summary, enter life event information, (during open enrollment) enroll for benefits, and view and perform Affordable Care Act-related actions.	Multiple pages found under the **Self Service**, and then **Benefits** menu, including: • Benefits Summary • Life Events • Affordable Care Act pages: View Form 1095-C and 1095-C Delivery Preferences Page
PeopleSoft eProfile: Career Snapshot Tile	Access a group of dashboards and tiles to see a comprehensive view of your talent data as an employee.	None
PeopleSoft Human Resources Administer Workforce: 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.	Using the classic menu path, select Company Directory or the Org Chart Viewer menu.
PeopleSoft Absence Management: Calendar Tile	View peer events at one place.	None
PeopleSoft Global Payroll: Global Payroll Tile	Access a collection of frequently-used Global Payroll employee self service components.	None
PeopleSoft Human Resources Monitor Health and Safety: Health and Safety Tile	Access health and safety activities for employees.	None
PeopleSoft Human Resources Administer Workforce: Manage Matrix Teams Tile	Create and manage your matrix teams through the PeopleSoft Fluid User Interface pages. **Note:** This tile is not delivered to appear on the Employee Self Service homepage but can be added through personalizations.	**Set Up HCM**, and then **Common Definitions**, and then **Org Chart Viewer**, and then **Setup Matrix Teams**, and then **Matrix Teams**
PeopleSoft eDevelopment: My Profiles Tile	Access the PeopleSoft eDevelopment: My Profiles Dashboard, where employees can view and maintain various profile transactions for themselves.	**Self Service**, and then **Learning and Development**

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Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft Human Resources Administer Workforce: OnBoarding Tile	Access intuitive tiles and pages for employees and contingent workers to complete actions or tasks that are required for a new job. **Note:** This tile is available when an employee has been assigned access to the OnBoarding pages due to a job event such as hire, rehire, or additional assignment.	None
PeopleSoft Benefits Administration: Open Enrollment Tile	Launch the Open Enrollment activity guide from where employees can view and update their benefit plan choices every year during the open enrollment period.	None
PeopleSoft ePay: Payroll Tile	Provide payroll-related transactions for employees, such as view paychecks, manage direct deposit accounts, manage consent for electronic delivery of year-end tax forms, view year-end tax forms, update tax withholding forms, and more. Before the delivery of the Payroll tile (PeopleTools 8.55 or above required), the Pay tile was available to provide employees the ability to view paychecks.	Multiple pages found under the **Self Service**, and then **Payroll and Compensation** menu: • Pay • W-4 Tax Information USA • View W-2/W-2c Forms W-2/W-2c Consent • Direct Deposit • View T4/T4A Slips T4/T4A Consent • View RL-1/RL-2 Slips RL-1/RL-2 Consent • Voluntary Deductions • Paycheck Modeler • 3rd Party Pay Inquiry
PeopleSoft ePay: Payslips Tile	View your PeopleSoft Global Payroll payslips.	**Self Service**, and then **Payroll and Compensation**, and then **View Payslips**
PeopleSoft ePerformance: Performance Tile	Access tiles and pages to manage your performance documents and peer reviews, and view your business objectives.	• **Self Service**, and then **Performance Management**, and then **My Performance (or Development) Documents**, and then **Performance** • **Self Service**, and then **Performance Management**, and then **Business Objectives**, and then **View Business Objectives**

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Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft eProfile: Personal Details Tile	View and update the personal information such as your name and address, contact details, marital status, and so forth.	Multiple pages found under the **Self Service**, and then **Personal Information** menu, including: • Home and Mailing Address • Phone Numbers • Email Addresses • Instant Message IDs • Emergency Contacts • Marital Status • Name Change • Ethnic Groups • Personal Information Summary
Recognition Tile	Access pages to create, view, and interact with recognitions as employees.	None
PeopleSoft eProfile: Remote Worker Tile (for Employees)	Enter and review your remote worker requests using fluid pages.	None
PeopleSoft Absence Management: Time Tile	Perform self-service actions related to time reporting and absences.	• **Self Service**, and then **Time Reporting**, and then **Report Time**, and then **Time** • **Self Service**, and then **Time Reporting**, and then **View Time**, and then **View Requests** • **Self Service**, and then **Time Reporting**, and then **View Time**, and then **Absence Balances**
PeopleSoft Human Resources Administer Compensation: Total Rewards Tile	View your earnings, benefits, and other compensation information in the form of a statement.	**Self Service**, and then **Payroll and Compensation**, and then **Total Rewards**
PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement Tile (for Employees)	Access the Tuition Reimbursement pages to create or review a tuition pre-approval or reimbursement request.	None

Additional Tiles

If you set up a PeopleSoft cluster, the Employee Self Service homepage can also display tiles from other content provider systems (for example, PeopleSoft Enterprise Learning Management) that are federated by the portal system (PeopleSoft HCM) into the cluster.

On the cluster, homepages with the same name are automatically merged. Therefore, the following tiles from other Employee Self Service homepages can automatically appear on the PeopleSoft HCM Employee Self Service homepage if the associated content provider system is part of the cluster. For example:

- Company News (PeopleSoft Interaction Hub)

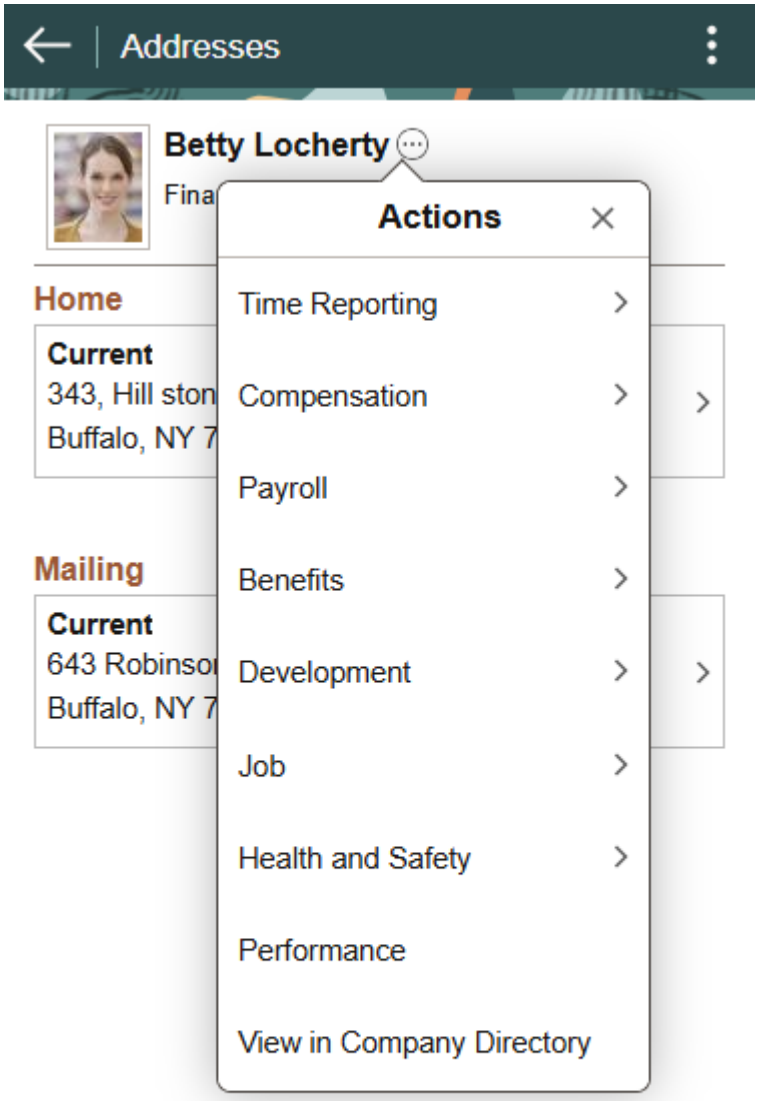
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- Learning (PeopleSoft Enterprise Learning Management)

Common Header for Employee Self-Service Pages

Many of the employee-related self-service fluid pages display a header with the employee's photo, name, job title, and an icon for accessing related actions. Although pages that use the delivered *Employee Photo Header* sub-page (HR_EMPL_HDR_SBF), display the employee name and job title in two rows, the Employee Header Configuration feature (see (Fluid) Managing Employee Headers) enables you to determine other field data that appears in fluid header.

This example illustrates the common header for employee self-service fluid pages. In this example, the user has tapped the Related Actions icon to display the Actions menu.



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Term	Definition
<**employee photo**>	The photo in the common header is visible if the **Display on Self Service** option is enabled on the Installation Table - HCM Options Page.
Update Photo	This link is visible if the **Allow Employee to Update Photo** option is enabled on the Installation Table. It is visible only on the Personal Details fluid pages. For more information about uploading an employee photo, refer to the documentation for the PeopleSoft eProfile: Select Photo Page.
	Tap the related actions icon next to the employee's name to display a menu of additional self-service transactions. The menu provides access to both fluid and classic pages.

Related Actions

On all pages that include a related actions menu, the menu choices are the same except that the menu never includes a link to the current page. The following table provides details about the related actions menu:

Top-Level Menu Item	Transactions
Time Reporting	• Timesheet • Request Extended Absence • View Extended Absence History • Donate Leave • Receive Donated Leave • Return Unused Leave • Terminate Participation in Program • View Leave Transfer Request • Overtime Request, • View Exceptions
Compensation	• Total Rewards • View Compensation History
Payroll	• Pay • Maintain Direct Deposit • Change W-4 Tax Information • Maintain Voluntary Deductions • W-2/W-2c Consent • Indicate T4/T4A Consent • View W-2/W-2c Forms • View T4/T4A Slips • Request W-2 Reissue • Payslips • View Payslip GBR • Maintain Personal Bank Accounts • Update Year End Adjustment Data Japan
Benefits	• Benefits Summary • View Dependent and Beneficiary Information

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Top-Level Menu Item	Transactions
Development	• Talent Profile • View My Historical Profile • View My Job Profiles • View My Interest List
Compare My Profile (appears only from the Talent Profile pages)	This menu item goes directly to the Select Profile page where users can begin the process of comparing their person profile to their job profile.
Search and Compare Profiles (appears only from the Talent Profile pages)	This menu item goes directly to the Search for Profiles page where users can begin the process of comparing various profiles.
Personal Details	This menu item goes directly to the Personal Details page.
Performance	This menu item goes directly to the Performance page.
View in Company Directory	This menu item goes directly to the Company Directory page.
View Team Snapshot (appears only from the Company Directory pages for one of your direct or indirect reports)	This menu item goes directly to the Team Snapshot - Summary dashboard.

Using the Manager Self-Service Homepage

This topic describes the delivered homepage for Manager Self-Service.

Page Used as the Manager Self Service Homepage

Page Name	Definition Name	Usage
Manager Self Service Homepage	HC_HR_MGR_SELF_SERVICE_FLU_GBL (this is the cref for the homepage)	Access a variety of manager self-service transactions.

Understanding Direct Reports

Most of the tiles on the Manager Self Service homepage provide managers with information about their team members.

Direct Reports UI Access Types are used for determining who reports to whom. The Access Type defines the reporting relationship between the logged in user and the employees reporting to that user for each registered transaction. Available options for Access Type 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). For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.

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- *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 information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

> **Note**
>
> Group ID and Department Security Tree are not supported access types for the My Team fluid pages.

Manager Self Service Homepage

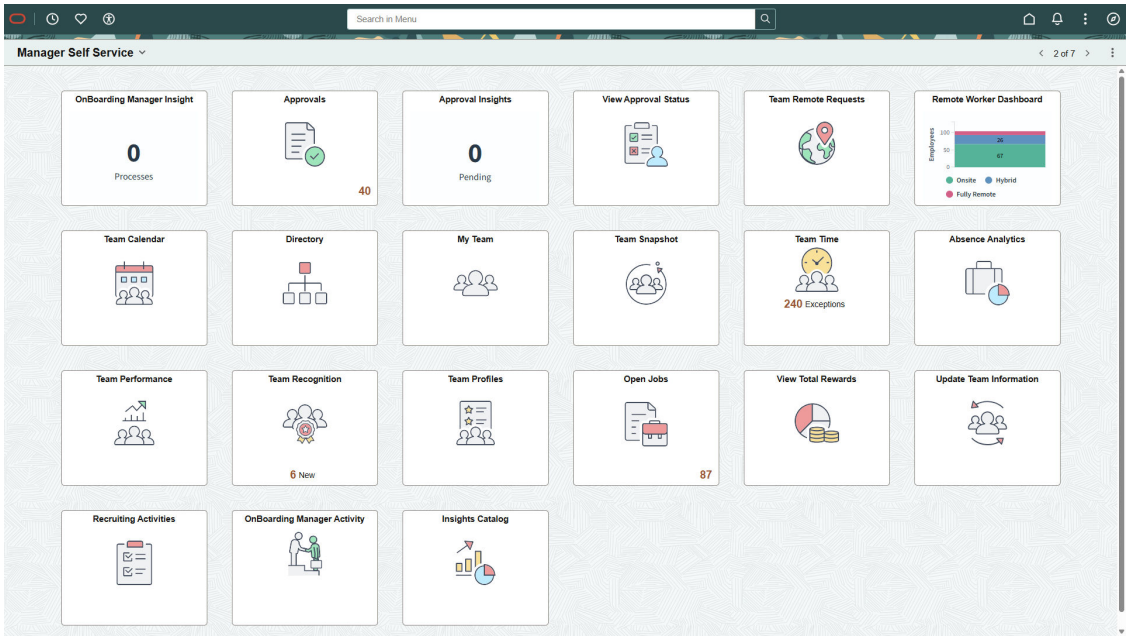
Use the Manager Self Service homepage to access a variety of manager self-service transactions. The cref for this page is HC_HR_MGR_SELF_SERVICE_FLU_GBL.

Navigation:

When you first sign in, the default homepage title appears at the top of the homepage. If the Manager Self Service homepage is not your default homepage, tap the title of the default homepage and select Manager Self Service from the list that appears.

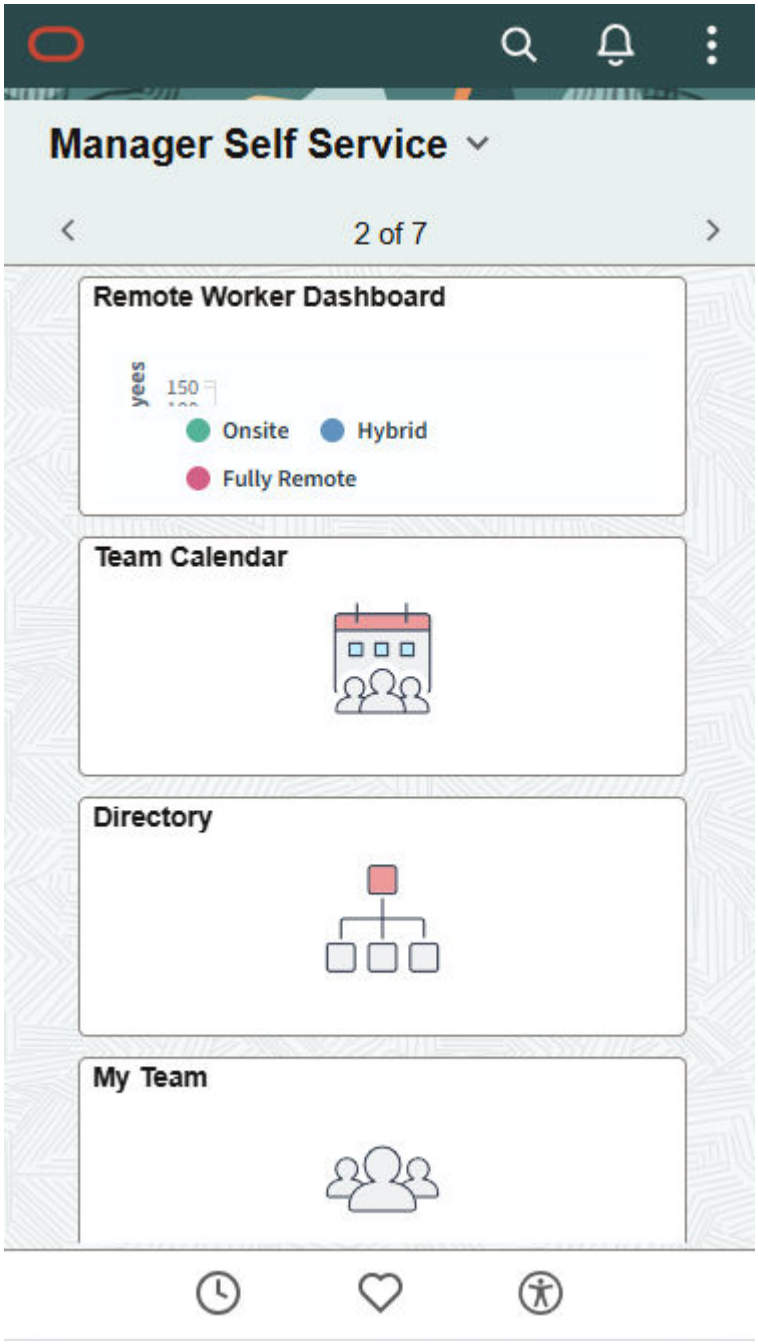
This example illustrates the Manager Self Service homepage.

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This example illustrates the Manager Self Service homepage for the smartphone. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

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PeopleSoft HCM Tiles on the Manager Self Service Homepage

The following table describes the tiles on the delivered Manager Self Service homepage. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to Fluid Transactions and Conditional Navigation when the user is in fluid mode.

Tiles are listed in alphabetical order. On the homepage, users can personalize the tile order.

Use the links in the table to access complete documentation for each transaction.

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Tile Name	Description	Conditional Navigation
PeopleSoft Absence Management: Absence Analytics Tile	Access a pivot grid with absence information about your team.	None
Approvals Tile (Fluid Approvals) Approvals Tile (MAP Approvals)	Review and act on approval requests.	Using the classic menu path **Manager Self Service** , and then **Review Transactions** redirects uses to the main fluid Pending Approvals page. The classic approval pages for these transactions also have conditional navigation to equivalent fluid approval pages: 1. Ad Hoc Salary Change 2. Address Change 3. Absence Request 4. Full/Part Time Status Change 5. Job Offer 6. Job Opening 7. Location Change 8. Name Change 9. Marital Status Change 10. Performance Document 11. Promote Employee 12. Reporting Change 13. Retire 14. Terminate 15. Transfer Employee
Approval Insights Tile (for Managers)	Access and view analytics related to approval requests that fall under your hierarchy.	None
PeopleSoft Human Resources Administer Workforce: Directory Tile	Access the Company Directory, where you can view employee personal and job data within the context of your organization's various hierarchical reporting structures.	Using the classic menu path, select Company Directory or the Org Chart Viewer menu.
PeopleSoft eProfile Manager Desktop: (Manager) Team Snapshot Tile	Access a group of tiles and dashboards to see a comprehensive view of talent data related to an employee.	None However, using the classic menu path, you can select **Manager Self Service**, and then **Talent Summary** to view similar data.
Insights Catalog Tile	Access a collection of HCM Insights dashboards.	None

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Tile Name	Description	Conditional Navigation
PeopleSoft eProfile Manager Desktop: My Team Tile	View information about employees in your direct line of reports and to perform actions for those employees. This tile provides information that is similar to the PeopleSoft eProfile Manager Desktop: Direct Line Reports Pagelet	None
PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Insight Tile (for Managers)	Access and view OnBoarding activity guide analytics for employees under your supervision.	None
PeopleSoft Talent Acquisition Manager: Open Jobs Tile	Review open jobs in your organization.	None
PeopleSoft Talent Acquisition Manager: Recruiting Activities Tile	View a navigation collection of commonly used recruiting pages, such as, My Job Openings, Search Job Openings, Create Job Opening, Applicant Lists, Interview Calender and Recruiting Alerts.	None
PeopleSoft Human Resources Administer Workforce: Remote Worker Dashboard Tile (for Managers)	Access and view HR remote workforce analytics as a manager to view information for employees under your supervision.	None
PeopleSoft Absence Management: Team Calendar Tile	Access the Team Calendar page to view and manage the calendar for direct and indirect reporters.	None
PeopleSoft ePerformance: Team Performance Tile	Work with performance documents, perform administrative tasks, and review document status progress for your team.	**Manager Self Service**, and then **Performance Management**, and then **Performance (or Development) Documents**, and then **Team Performance**
PeopleSoft ePerformance: Team Performance Status Tile	View a chart related to the status of your team's performance documents. Use this tile to view additional details and modify chart displays if necessary.	None
PeopleSoft eDevelopment: Team Profiles Tile	Access the manager Team Profiles dashboard, where managers can view and maintain various profile transactions related to their team.	**Manager Self Service**, and then **Learning and Development**
Team Recognition Tile	Access pages to create, view, and interact with team members' recognitions as managers.	None
PeopleSoft eProfile Manager Desktop: Team Remote Request Tile	Enter and review remote worker requests for your direct reports using fluid pages.	None

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Tile Name	Description	Conditional Navigation
PeopleSoft Time and Labor: Team Time Tile for time reporting PeopleSoft Absence Management: Team Time Tile for absences	Use this tile to: • Perform manager tasks related to time reporting, including viewing and resolving exceptions and viewing locations where employees entered time (if the employee has accepted the use of location services). • Perform manager tasks related to absences, including viewing absence requests and balances and entering absence requests on behalf of team members.	• **Manager Self Service**, and then **Time Management**, and then **Report Time**, and then **Request Absence** • **Manager Self Service**, and then **Time Management**, and then **View Time**, and then **View Requests** • **Manager Self Service**, and then **Time Management**, and then **View Time**, and then **Employee Absence Balances**
PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Team Tuition Reimbursements Tile (for Managers)	Access the Tuition Reimbursement request pages for one of their employees to view the status or history of tuition requests.	None
PeopleSoft eProfile Manager Desktop: Update Team Information Tile	Access guided self-service transactions. Managers use these transactions to update data for employees in their organization.	None.
PeopleSoft Human Resources Administer Compensation: View Total Rewards Tile	View employee's earnings, benefits, and other compensation information in the form of a statement.	**Manager Self Service**, and then **Compensation and Stock**, and then **View Total Rewards**

Additional Tiles

If you set up a PeopleSoft cluster, the Manager Self Service homepage can also display tiles from other content provider systems (for example, PeopleSoft Enterprise Learning Management) that are federated by the portal system (PeopleSoft HCM) into the cluster.

On the cluster, homepages with the same name are automatically merged. Therefore, the following tiles from other Manager Self Service homepages can automatically appear on the PeopleSoft HCM Manager Self Service homepage if the associated content provider system is part of the cluster. For example:

- Company News (PeopleSoft Interaction Hub)
- Team Learning (PeopleSoft Enterprise Learning Management)
- Learning Compliance (PeopleSoft Enterprise Learning Management)

Related Actions for Manager Self Service Pages

On many of the manager self-service fluid pages, a related actions icon appears next to the names of team members. Tapping the related actions icon displays a menu of additional self-service transactions, including classic self-service transactions, regular fluid transactions, and guided-self-service fluid transactions. For more information on guided self-service, see PeopleSoft eProfile Manager Desktop: Understanding Guided Self-Service Transactions.

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On all pages that include a related actions menu, the menu choices are the typically the same except that the menu never includes a link to the current page. Menu items and transactions may vary based on user availability or transaction.

The following table provides details about the related actions menu:

Top-Level Menu Item	Transactions
Time Management	• Request Absence • View Requests • Absence Balances
Job and Personal Information	• Request Reporting Change • Transfer Employee • Promote Employee • Request Location Change • View Employee Personal Info • Change Full/Part Time or Hours • Request Leave of Absence • Request Paid Leave of Absence • Retire Employee • Terminate Employee • Demote Employee • Clone Position See also PeopleSoft eProfile Manager Desktop: Performing Guided Self-Service Transactions in Manager Self-Service.
Compensation	• Request Ad Hoc Salary Change See also PeopleSoft eProfile Manager Desktop: Performing Guided Self-Service Transactions in Manager Self-Service. • View Total Rewards • View Compensation History
Development	• View Current Team Profiles • View Team Historical Profiles • View Team Interest Lists
Performance Management	• Team Performance • Open Performance Documents • Open Development Documents
Career Planning (appears only from the Team Snapshot pages)	• Manage Career Plans • View Career Progressions Chart
Succession Planning (appears only from the Team Snapshot pages)	• View Succession 360 • Manage Succession Plans
View in Talent Summary	This menu item goes directly to the classic Talent Summary page.
View in Company Directory	This menu item goes to the Company Directory pages.
View Digital Badges	This menu item goes to the View Digital Badges pages.
View in Team Snapshot	This menu item goes directly to the fluid Team Snapshot - Summary dashboard for one of your direct or indirect reports.
OnBoarding Status (when there is an active OnBoarding instance)	This menu item goes to the OnBoarding Activities page.

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Top-Level Menu Item	Transactions
Notify Employee	This menu item opens the Notify Employee page to send alerts or emails to employees.

Viewing Employee Photos

The PeopleSoft application enables you to view a photo of employees on many of the self-service pages when the **Display on Self Service** option is enabled on the Installation Table - HCM Options Page. When this functionality is disabled, the photo will not be available for viewing.

Using the Workforce Administrator Homepage

This topic describes the delivered Workforce Administrator homepage.

The following video provides a demonstration of how to use the navigation collections accessed through the Workforce Administrator homepage.

Video: Image Highlights, PeopleSoft HCM Update Image 18: Application Start Pages

Page Used as the Workforce Administrator Homepage

Page Name	Definition Name	Usage
Workforce Administrator Homepage	HC_HR_WORKFORCE_ADMIN_FLU_GBL (this is the cref for the homepage)	Access a variety of workforce administration transactions.

Workforce Administrator Homepage

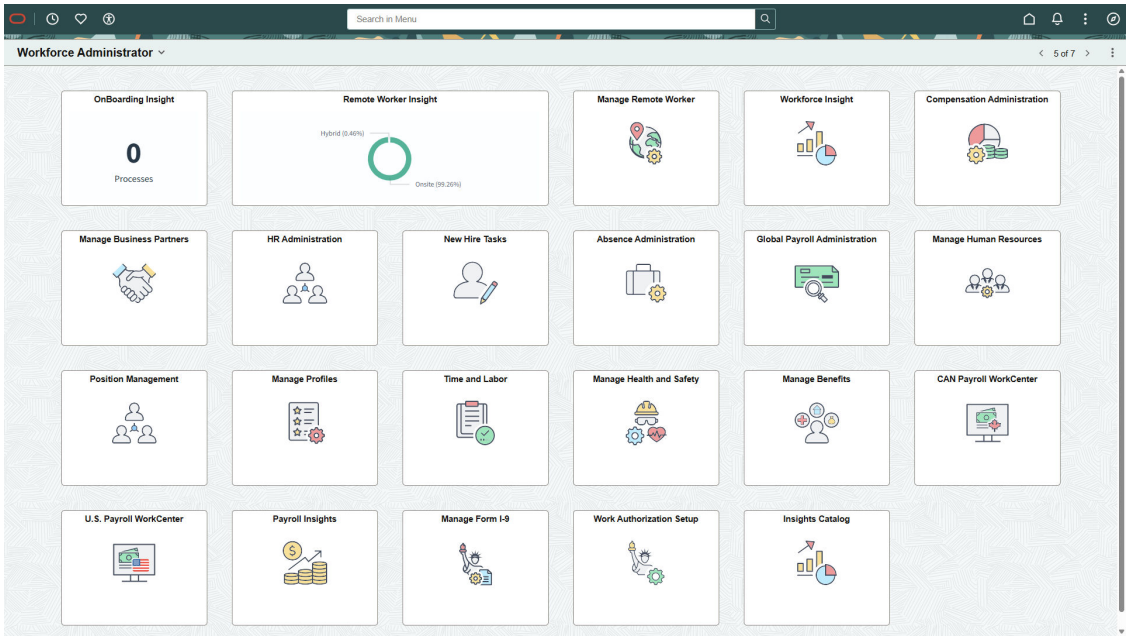
Use the Workforce Administrator homepage to access a variety of workforce administration transactions. The cref for this homepage is HC_HR_WORKFORCE_ADMIN_FLU_GBL.

Navigation:

The default homepage title appears at the top of the homepage when you first sign in. If the Workforce Administrator homepage is not your default homepage, tap the title of the default homepage and select Workforce Administrator from the list that appears. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

This example illustrates the Workforce Administrator homepage.

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PeopleSoft HCM Tiles on the Workforce Administrator Homepage

The following table describes the tiles on the delivered Workforce Administrator homepage. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to Fluid Transactions and Conditional Navigation when the user is in fluid mode.

Tiles are listed in alphabetical order. On the homepage, users can personalize the tile order.

Use the links in the table to access complete documentation for each transaction.

> **Note**
>
> The Time and Labor and Profile Administration tiles are not supported on small form factor devices.

Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft Absence Management: Absence Administration Tile	Provides quick access to a variety of frequently-used Absence Management administrative components.	None
PeopleSoft Payroll for North America: CAN Payroll WorkCenter Tile	Provides quick access to a variety of payroll-related administrative components for Canada.	**Payroll for North America**, and then **Payroll WorkCenter CAN**
PeopleSoft eCompensation Manager Desktop: Compensation Administration Tile	Provides quick access to a variety of compensation-related administrative components.	None
PeopleSoft Global Payroll: Global Payroll Administration Tile	Provides quick access to a variety of frequently-used Global Payroll administrative components.	None

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Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft Human Resources Administer Workforce: HR Administration Tile	Provides quick access to a variety of frequently-used Human Resources administrative components.	None
Insights Catalog Tile	Grants access to a collection of HCM Insights dashboards.	None
PeopleSoft Benefits Administration: Using the PeopleSoft Fluid User Interface to Manage Benefits as an AdministratorManage Benefits Tile	Provides quick access to Manage Benefits Dashboard where you can access a variety of configuration and administrative components for Benefits business process.	None
PeopleSoft Human Resources Administer Workforce: Manage Business Partners Tile	Provides quick access to a variety of frequently-used administrative components used to create business partner teams.	None
PeopleSoft Human Resources Administer Workforce: Manage Form I-9 Tile	Gives administrators access to the Manage Form I-9 component for the USA to view their own, employee, and delegated I-9 tasks that are in progress or completed.	None
PeopleSoft Human Resources Monitor Health and Safety: Manage Health and Safety Tile	Provides quick access to a variety of setup and administrative components for the Monitor Health and Safety business process.	None
PeopleSoft Human Resources Administer Workforce: Manage Human Resources Tile	Gives access to the Manage Human Resources dashboard where you can access a variety of configuration and administrative components for adding and maintaining person and job workforce information using fluid. **Note:** This tile can be added to the Administer Workforce homepage through personalizations.	None
PeopleSoft Human Resources Administer Workforce: New Hire Tasks Tile	Provides quick access to a variety of components that are used to administrate new hires.	None
PeopleSoft Human Resources Administer Workforce: OnBoarding Insight Tile (for Administrators)	Grants access to view OnBoarding Insight analytics as an administrator.	None
PeopleSoft Payroll for North America: Payroll Insights Tile	Provides access to Insights Payroll Cost, Operations, and Trends Analytics.	None

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Tile Name	Description	Navigation to Equivalent Classic Pages
PeopleSoft Human Resources Manage Positions: Position Management Tile	Grants access to the Position Management dashboard where you can set up or view summaries of Position Management data.	**Organizational Development** , and then **Position Management**
PeopleSoft Human Resources Manage Profiles: Manage Profiles Tile	Provides quick access to a variety of administrative components used for the Profile Administration business process.	**Workforce Development**, and then **Profile Management**
PeopleSoft Human Resources Administer Workforce: Manage Remote Worker Tile (for Administrators)	Enables you to enter and review remote worker requests for the workforce using fluid pages.	None
PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Manage Tuition Reimbursement Tile (for Administrators)	Access the Tuition Reimbursement pages to create or review a tuition pre-approval or reimbursement request for an employee.	None
PeopleSoft Human Resources Administer Workforce: Remote Worker Insight Tile (for Administrators)	Enables you to access and view HR remote workforce analytics as an administrator.	None
PeopleSoft Time and Labor: Time and Labor	Enables you to access the Time and Labor WorkCenter with one click.	**Manager Self Service**, and then **Time Management**, and then **Time and Labor**
PeopleSoft Payroll for North America: U.S. Payroll WorkCenter Tile	Provides quick access to a variety of payroll-related administrative components for USA.	**Payroll for North America**, and then **Payroll WorkCenter USA**
PeopleSoft Human Resources Administer Workforce: Work Authorization Setup Tile	Allows you to configure settings for the I-9 form for the United States.	None
PeopleSoft Human Resources Administer Workforce: Workforce Insight Tile	Grants access to a collection of frequently-used analytic reports for workforce administration.	None

Using the Talent Administrator Homepage

Use the Talent Administrator homepage to access a variety of talent administration transactions. The cref for this homepage is HC_HR_ADMINISTRATOR_FLU_GBL.

The following video provides a demonstration of how to use the navigation collections accessed through the Talent Administrator homepage.

Video: Image Highlights, PeopleSoft HCM Update Image 18: Application Start Pages

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Page Used to as the Talent Administrator Homepage

Page Name	Definition Name	Usage
Talent Administrator Homepage	HC_HR_ADMINISTRATOR_FLU_GBL	Access a variety of talent administration transactions.

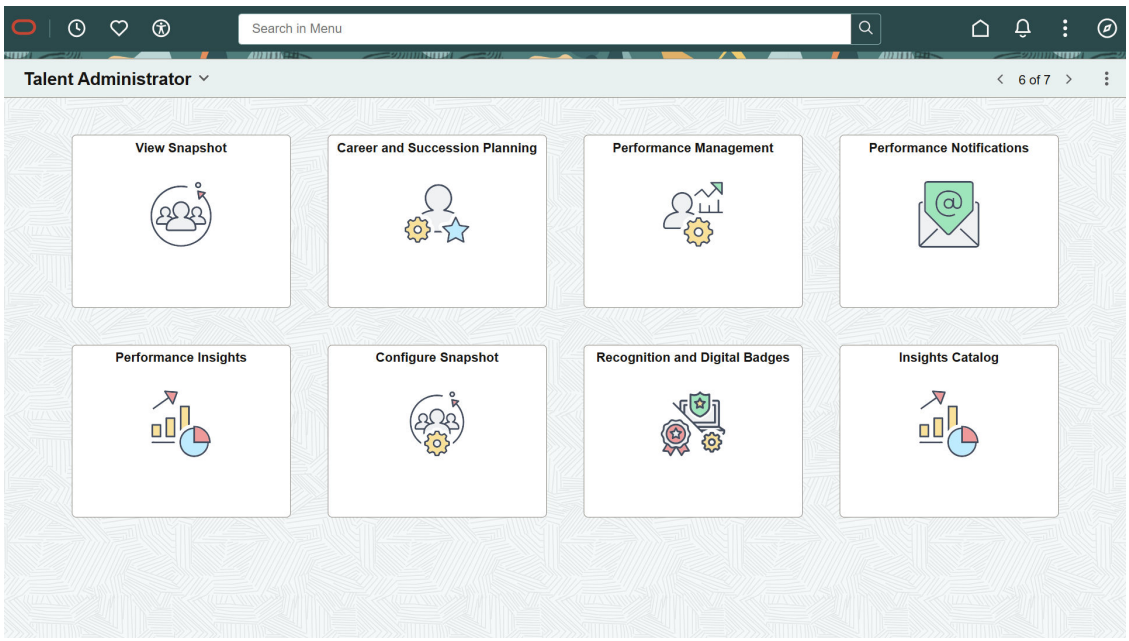
Talent Administrator Homepage

Use the Talent Administrator homepage to access a variety of talent administration transactions. The cref for this homepage is HC_HR_ADMINISTRATOR_FLU_GBL.

Navigation:

The default homepage title appears at the top of the homepage when you first sign in. If the Talent Administrator homepage is not your default homepage, tap the title of the default homepage and select Talent Administrator from the list that appears.

This example illustrates the Talent Administrator homepage.



This example illustrates the Talent Administrator homepage for the smartphone.

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PeopleSoft HCM Tiles on the Talent Administrator Homepage

The following table describes the tiles on the delivered Talent Administrator homepage. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to Fluid Transactions and Conditional Navigation when the user is in fluid mode.

These tiles are listed in alphabetical order. On the homepage, users can personalize the tile order.

Use the links in the table to access complete documentation for each transaction.

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Tile Name	Description	Navigation Equivalent Classic Pages
PeopleSoft Human Resources Plan Careers and Successions: Career and Succession Planning Tile	Provides quick access to a variety of frequently-used Career and Succession Planning administration components.	None
PeopleSoft eProfile Manager Desktop: Configure Snapshot Tile	Enables you to access the Snapshot configuration pages.	None
PeopleSoft eProfile Manager Desktop: (Administrator) View Snapshot-Tile	Grants access to a comprehensive view of talent data related to an individual employee.	None
Insights Catalog Tile	Grants quick access to a collection of HCM Insights dashboards.	None
PeopleSoft ePerformance: Performance Management Tile	Provides quick access to a variety of frequently-used performance administrative components.	None
PeopleSoft ePerformance: Performance Notifications Tile	Provides quick access to a list of pages used to set up and configure the Due Date Notifications feature in ePerformance.	None
PeopleSoft ePerformance: Performance Insights Tile	Provides quick access to analytics for employee performance and documents.	None
Recognition and Digital Badges Tile	Provides quick access to Recognition and Digital Badges configuration and administrator tasks.	None
PeopleSoft Talent Acquisition Manager: Recruiting Home Tile	Enables you to access the classic Recruiting Home. **Note:** A Fluid Recruiting Homepage is available which enables you to access the Recruiting tiles. For more information, see Using the Recruiting Homepage. We strongly recommend you to remove the Recruiting Home Tile from the Talent Administrator Homepage.	You can access the Recruiting Home from the Recruiting menu and from the Recruiting Home link that appears in the toolbars at the top of many recruiting pages.

Using the Recruiting Homepage

PeopleSoft delivers the Fluid Recruiting Homepage with various tiles which enable Recruiters, Recruiting Managers and Recruiting Administrators to access commonly used recruiting activities.

Video: The PeopleSoft Fluid Recruiter Home and Hiring Manager Navigation Collection

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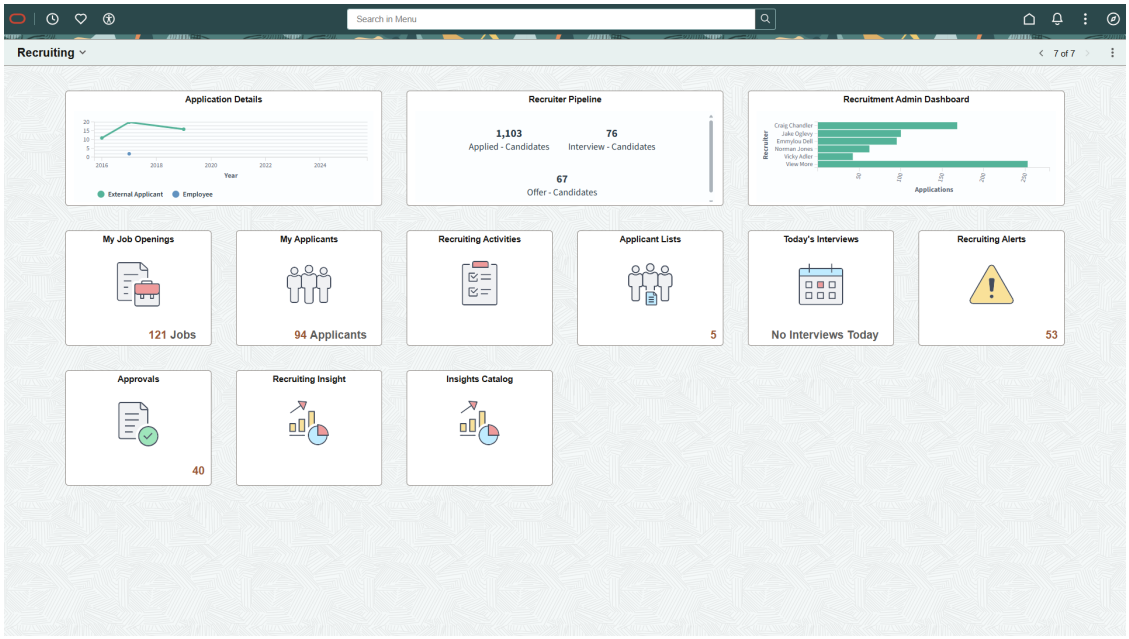
> **Note**
>
> Only users with the following roles will have access to the Fluid Recruiting Homepage: Recruiter Fluid, Recruiting Manager Fluid, and Recruitment Administrator Fluid.
>
> These roles do not replace the classic Recruiter, Recruiting Manager and Recruitment Administrator Roles. The fluid roles should be added in addition to the existing recruiting roles for access to the Fluid Recruiting Homepage.

For general information about fluid pages in PeopleSoft HCM, see Application Fundamentals: Understanding PeopleSoft Fluid User Interface Homepages.

The Fluid Recruiting Homepage is automatically delivered to recruiting users with the fluid recruiting roles. The default homepage title appears at the top of the homepage when you first sign in. If the Recruiting homepage is not your default homepage, tap the title of the default homepage and select Recruiting from the list that appears.

Recruiting Homepage

This example illustrates the Fluid Recruiting Homepage.



Tile Name	Description
PeopleSoft Talent Acquisition Manager: Application Details Tile	View visual charts of different aspects of application details.
Application Fundamentals: Insights Catalog Tile	Access a collection of HCM Insights dashboards.

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Tile Name	Description
PeopleSoft Talent Acquisition Manager: My Job Openings Tile	View the count of open jobs associated with the recruiting user, and access information about the job openings using the PeopleSoft Talent Acquisition Manager: My Job Openings Page.
PeopleSoft Talent Acquisition Manager: My Applicants Tile	View the count of applicants the recruiting user has and access information about the applicants on the PeopleSoft Talent Acquisition Manager: My Applicants Page.
PeopleSoft Talent Acquisition Manager: Recruiting Activities Tile	Access the PeopleSoft Talent Acquisition Manager: Recruiting Activities Page to view a navigation collection of commonly used recruiting activities.
PeopleSoft Talent Acquisition Manager: Applicant Lists Tile	View the count of private lists owned by the recruiting user, as well as the active public lists, and access the PeopleSoft Talent Acquisition Manager: My Applicant Lists Page.
PeopleSoft Talent Acquisition Manager: Today's Interviews Tile	View the number of interviews the recruiting user has scheduled for the current day and access the PeopleSoft Talent Acquisition Manager: My Interviews Page.
Approvals Tile	Access the Approvals pages: PeopleSoft Talent Acquisition Manager: Pending Approvals – Job Offer Page and PeopleSoft Talent Acquisition Manager: Pending Approvals – Job Opening Page, and take action on pending approvals related to recruiting activities, like job offer, job openings, using Fluid Approvals.

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Tile Name	Description
PeopleSoft Talent Acquisition Manager: Recruiting Alerts Tile	View the total count of alerts associated with the recruiting user's job openings and access the PeopleSoft Talent Acquisition Manager: Recruiting Alerts Page.
PeopleSoft Talent Acquisition Manager: Recruiting Insight Tile	Access the Recruiting Insight dashboard and various pivot grids that provide graphic views of important performance measures.
PeopleSoft Talent Acquisition Manager: Recruiting Manager Summary Tile	**Note:** This tile is available only for users with the Recruiting Manager Fluid role. Access the PeopleSoft Talent Acquisition Manager: Recruiting Manager Summary Page to view summary information about the workload and effectiveness of recruiters who report to the current user.

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(Fluid) Using PeopleSoft My Home Landing Page

Understanding PeopleSoft My Home Landing Page

The PeopleSoft My Home Landing Page provides a single point of entry for all users, creating a seamless navigation to relevant content and functional areas within PeopleSoft applications. The single landing page provides a simplified navigation as an alternative to navigating across role-focused homepages and provides an inviting, informative, and content-rich user experience that uses the Notification framework to suggest tasks for users to complete and guides them to unfinished tasks. Organizations have greater control over the layout and styling of landing page sections, tiles, and dashboards.

The PeopleSoft application provides the PeopleSoft My Home Landing Page as an example you can use as-is "out of the box" or as a starting point for you to implement your own user experience. The following PeopleSoft My Home Landing Page topics demonstrate examples of how you can incorporate sections, tiles, and dashboards within your landing page.

> **Important**
>
> The PeopleSoft My Home Landing Page requires PeopleTools 8.62 or higher.

The following video provides an overview and demonstration of the PeopleSoft Landing Page:

Video: Image Highlights, PeopleSoft HCM Update Image 53: PeopleSoft HCM Example Landing Page

This topic provides an overview of how to set up the landing page, lists roles and permission lists, and describes the delivered PeopleSoft My Home Landing Page layout and sections.

Page Used as the PeopleSoft My Home Landing Page

Page Name	Definition Name	Usage
PeopleSoft (My Home) Landing Page	EO_PSFT_HOME (this is the cref for the homepage)	Access a variety of transactions from one page to see and perform daily and ongoing tasks. Access to the information is based on roles and security.

Setting Up PeopleSoft My Home Landing Page

While the PeopleSoft HCM application delivers many sections and tiles for the My Home landing page, you will need to perform the following steps to support your organization's needs.

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1. Use the PeopleSoft Landing Page feature to configure landing page sections.

   See *PeopleTools: Portal Technology*, "Developing Advanced Sectionalized Homepages and Dashboards," Designing PeopleSoft Landing Page.

2. Use Compose Notification pages (see Enterprise Components: Creating and Managing Notifications with Notification Composer) to define notifications that can appear in dynamic sections, such as Suggestions, Continue With, and Announcements.

   For more information about notifications for the PeopleSoft My Home Landing Page, see Understanding Delivered Notifications for the PeopleSoft My Home Landing Page.

3. Use section templates to clone and modify sections, as needed.

4. Use the User Profiles - Roles page to assign the *PeopleSoft Landing Page* role to users to access the PeopleSoft My Home Landing Page.

   (**PeopleTools**, and then **Security**, and then **User Profiles**, and then **User Profiles**, and then **Roles**)

   Assign other roles and permission lists, as needed.

> **Note**
>
> For information on the PeopleSoft Landing Page, such as information on section templates and security, see My Oracle Support: PeopleSoft Landing Page (KA779).

HCM Roles and Permission Lists for the PeopleSoft My Home Landing Page

This table lists the roles and permissions that Oracle delivers related to the HCM PeopleSoft My Home Landing Page.

Page, Section, or Tile Name	Role	Permission List
PeopleSoft My Home Landing Page	*PeopleSoft Landing Page*	*EOHPUSER*

> **Note**
>
> Roles and permission for individual functional or transactional tiles are defined in the corresponding documentation for that feature.

PeopleSoft (My Home) Landing Page

Use the PeopleSoft (My Home) Landing Page (EO_PSFT_HOME) to access a variety of transactions from one page to see and perform daily and ongoing tasks.

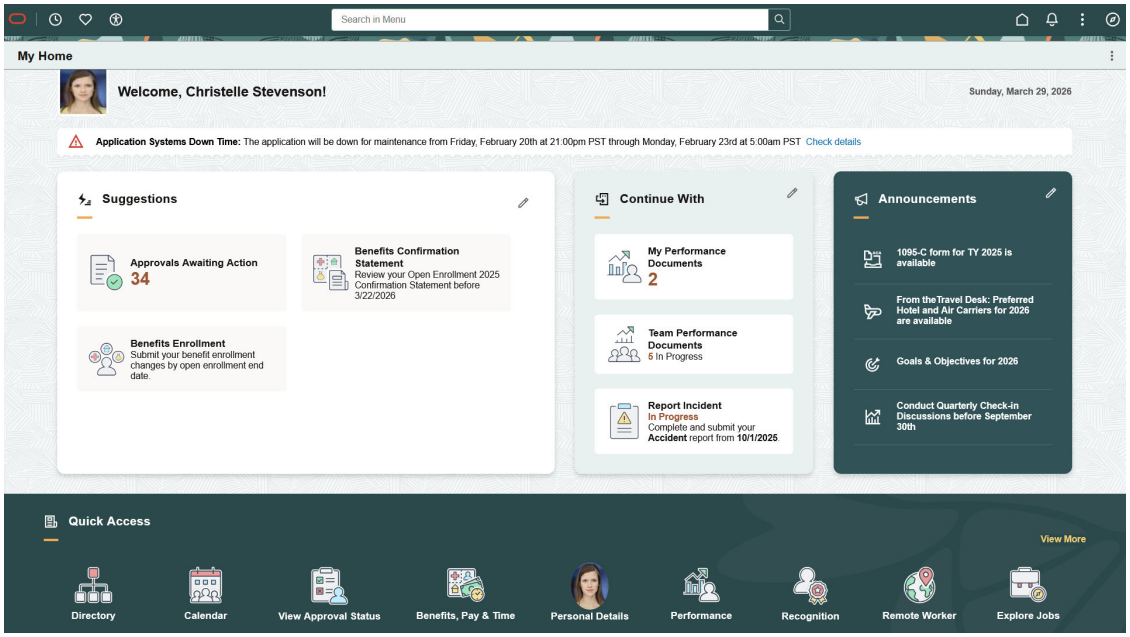
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> **Note**
>
> Users must be assigned the *PeopleSoft Landing Page* role to access the PeopleSoft My Home Landing Page. Tiles within the landing page vary based on user role and security.

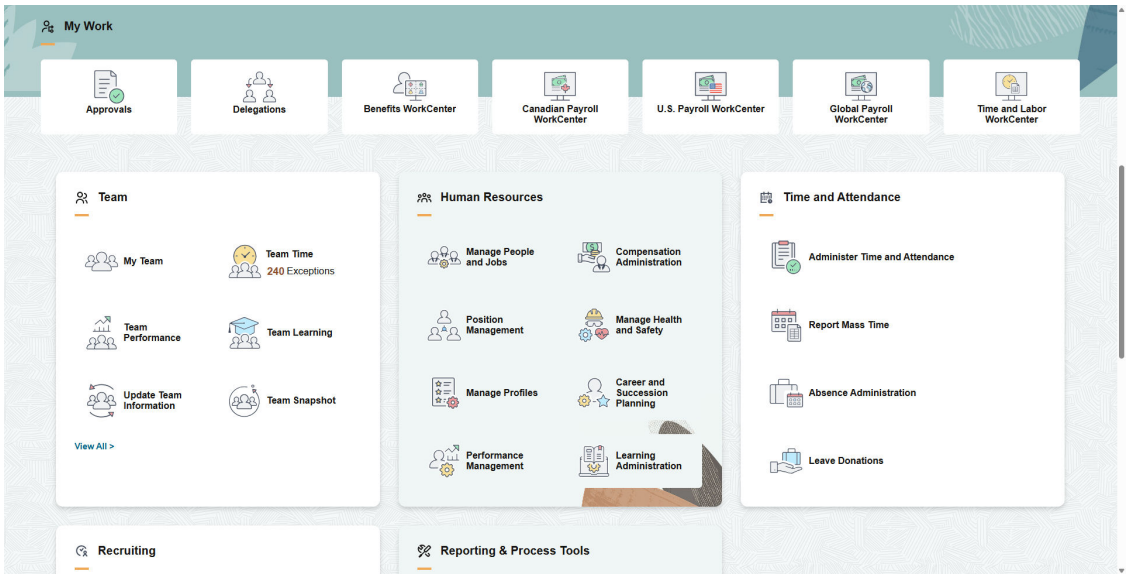
Navigation:

Select the *My Home* option from the homepage selector drop-down in the top left of the fluid page banner.

This example illustrates an example of the HCM - My Home landing page in fluid (1 of 3).

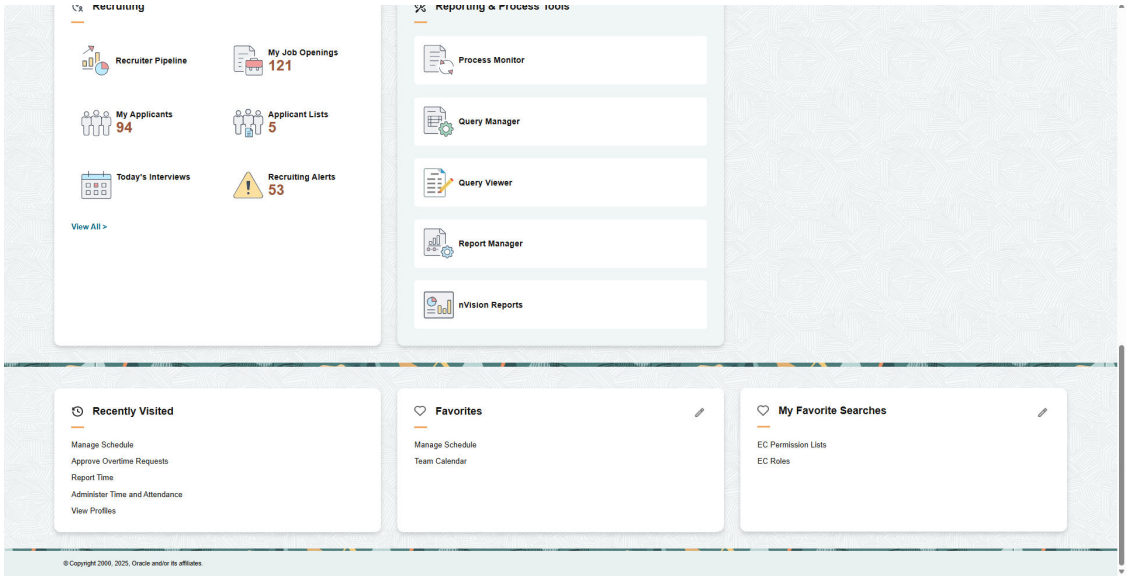


This example illustrates an example of the HCM - My Home landing page in fluid (2 of 3).



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This example illustrates an example of the HCM - My Home landing page in fluid (3 of 3).



The PeopleSoft (My Home) Landing Page is made up of various functional groups called sections. Sections contain functional or administrative groupings of tiles that use security access to manage what tiles appear for a user within a section. This allows users, even those with multiple roles (e.g.-employee, manager, or administrator), the ability to access their daily work transactions from one page.

> **Note**
>
> Sections themselves do not have security; they inherit security from the tiles or CREFs displayed within the section. When a user does not have access to any tiles within a section, the section does not appear for the user.

Tiles within a section can be static (content referenced-based tiles that are fixed and present on sections based on the permissions of the user) or can be dynamic (created as result of an event or action and go away when the user takes an action or dismisses the tile). For example, the Suggestions, Continue With, and Announcements sections contain dynamic tiles which prompt a user to do a task.

For additional information on Landing Page functionality, see *PeopleTools: Portal Technology*, "Developing Advanced Sectionalized Homepages and Dashboard".

Delivered HCM Section Templates

PeopleSoft HCM delivers landing page section templates. You can use a delivered section as is. If you want to modify a delivered section, Oracle recommends that you clone the template in your production system and modify the copied template for your own use.

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> **Important**
>
> When you make section modifications, you must re-import the template. Updates made to a section template take effect only after the section template is re-imported into the landing page.

The following lists the delivered section templates for the HCM My Home landing page.

- Welcome
- Banner Announcement *
- Suggestions *
- Continue With *
- Announcements *
- Quick Access
- My Work
  - Team
  - Human Resources
  - Time and Attendance
  - Recruiting
  - Reporting & Process Tools
- Recently Visited
- Favorites
- My Favorite Searches
- Footer

*For information on sections that use notifications, see Understanding Delivered Notifications for the PeopleSoft My Home Landing Page.

For information regarding each section, see Working with PeopleSoft My Home Landing Page Sections.

Understanding Delivered Notifications for the PeopleSoft My Home Landing Page

The PeopleSoft (My Home) Landing Page is designed to deliver dynamic, actionable notifications directly to users. These notifications inform users of critical tasks, incomplete actions, and important system messages, enhancing their day-to-day workflow efficiency and compliance.

This video provides an overview of the delivered notifications for the Landing Page:

Video: Image Highlights, PeopleSoft HCM Update Image 54: Additional Suggestions and Continue With Functionality for Landing Pages

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Using Notifications with the PeopleSoft My Home Landing Page

The PeopleSoft My Home Landing Page notifications are shown within these dynamic sections:

- Banner Announcement
- Suggestions
- Continue With
- Announcements

Both Notification Composer and Notification Publisher provide notification functionality for the PeopleSoft My Home Landing Page.

To configure notifications to appear within these sections (with the exception of Banner Announcement), see Enterprise Components: Creating and Managing Notifications with Notification Composer and follow these steps:

1. Configure notification IDs to use the *Homepage* notification type.
2. Specify the section in which the notification should appear.
3. Add a tile image and other details, like target URL, and so forth.

Landing page notifications can be sent to recipients using Notification Composer or Notification Publisher. For more information, see Enterprise Components: Understanding Notification Tools for Landing Page Notifications.

Video: Image Highlights, PeopleSoft HCM Update Image 54: Additional Suggestions and Continue With Functionality for Landing Pages

Delivered HCM Notifications and Tiles for Suggestions Section

This table lists the HCM *Homepage Notifications* (EOHP_NOTIFY) delivered for the **Suggestions** section.

Product / Business Process	Notification	Tile	Additional Information	Image Added
Benefits Administration (Benefits Enrollment)	*BenOpenEnrollmentSuggestions* (Open Enrollment Suggestions)	Benefits Enrollment tile	The tile appears when Open Enrollment is active for the employee. The tile is dismissed when the user selects the tile. The tile then appears on the *Continue With* section.	Image 53

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Product / Business Process	Notification	Tile	Additional Information	Image Added
Benefits Administration (Benefits Statement)	*BenConfStmtSugg* (Benefits Online Confirmation Suggestion)	Benefits Confirmation Statement tile	The tile appears when the confirmation statement is generated for the employee. The tile is dismissed when the admin runs the *Dismiss InApp Notifications* process.	Image 55
ePerformance (Performance Review Documents)	*PerformanceDocHPSUGGEmployee* (Performance Document Homepage Suggestion - Employee)	My Performance Documents tile	The tile appears when an administrator, manager, or employee creates a document for the employee. The tile displays either the initial document status based on its template and the period begin date, or the notification count if there are multiple notifications. The tile is dismissed when the document is opened (status changes to *In Progress*) and saved. If the tile shows a notification count, the count decreases when the dismissal condition is met for the documents that triggered those notifications.	Image 53

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Product / Business Process	Notification	Tile	Additional Information	Image Added
ePerformance (Performance Review Documents)	*PerformanceDocHPSUGGManager* (Performance Document Homepage Suggestion - Manager)	Team Performance Documents tile	The tile appears when an administrator reopens a team document. The tile displays the employee's name with the period begin date. If more than one document is reopened, the tile shows a notification count. The tile is dismissed when the manager opens and saves the team document. If the tile shows a notification count, the count decreases when the dismissal condition is met for the documents that triggered those notifications.	Image 54
Human Resources (I9 Adhoc Notification)	*I9NotifyEmployee* (I9 Adhoc Notification)	I-9 Form tile	The tile appears after you run the nightly process to identify employees who: • Have been hired that have not submitted their Section 1. • Are re-hired and have not submitted their Section 1 in the last 3 years. • Have had their I-9 pushed back. The tile is dismissed when the employee submits Section 1.	Image 53

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Product / Business Process	Notification	Tile	Additional Information	Image Added
Human Resources (PreBoarding and OnBoarding)	*OnBoardingSuggestionEmp* (OnBoarding Suggestion Employee Homepage)	OnBoarding tile	The tile appears when an OnBoarding event is triggered. • For automatic triggers see PeopleSoft Human Resources Administer Workforce: Understanding OnBoarding Triggers and Handlers. • For manual triggers see PeopleSoft Human Resources Administer Workforce: Manage OnBoarding Event Page. The tile is dismissed when the user selects the tile. The tile then appears on the *Continue With* section.	Image 53

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Product / Business Process	Notification	Tile	Additional Information	Image Added
Human Resources (OffBoarding)	*OffBoardingSuggestionEmp* (OffBoarding Suggestion Employee Homepage)	OffBoarding tile	The tile appears for an employee when an OffBoarding event is triggered. • For automatic triggers from a termination, see PeopleSoft Human Resources Administer Workforce: Understanding OffBoarding Triggers and Handlers. • For manual triggers see PeopleSoft Human Resources Administer Workforce: Manage OffBoarding Event Page. The tile is dismissed when the user selects the tile. The tile then appears on the *Continue With* section.	Image 54

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Product / Business Process	Notification	Tile	Additional Information	Image Added
Recruiting (Job Offers)	*PostedOffer* (Landing Page Notification for Posted Offer for Internal Applicants)	Job Offer tile	The tile appears when an offer is created for an internal applicant, who applied for a job posting. Selecting the tile, takes the applicant to My Notifications on Candidate Gateway where he can accept or reject the offer. The tile is dismissed when: • The applicant accepts or rejects the offer. • The applicant selects the *Dismiss* button on the *View All* page or *Edit* button on the **Continue With** section. • When the job offer has expired, and the admin runs the *Dismiss InApp Notifications* process.	Image 53

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Product / Business Process	Notification	Tile	Additional Information	Image Added
Time and Labor (Reported Time)	*TLReportedTimeSuggestion* (Reported Time Suggestion)	Timesheet tile	This tile appears for employees who have not submitted any time for the past week. The logic checks whether an employee who is scheduled to report time for the week has not reported at all. If time has been reported for even one day in the week, this suggestion will not be displayed. The tile is dismissed when the timesheet for the suggested period is opened and either saved or submitted, regardless of whether all days in the period are filled.	Image 53

Delivered HCM Notifications and Tiles for Continue With Section

This table lists the HCM *Homepage Notifications* delivered for the **Continue With** section.

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Absence Management (Absence Requests)	*AbsenceRequestContinue* (Absence Request Continue With Notification on Homepage)	Absence Request tile	The tile appears for an employee when an employee saves an absence request for later and is yet to be submitted. The tile appears for a manager when the manager saves a request for later on employee's behalf. **Note:** The Continue With section is available based on the initiator. For example, if the manager initiates an absence request and saves for later, then it will be available only for manager and not the employee. The tile is dismissed when the employee, the manager or the admin submits the absence request.	Image 53
Absence Management (Extended Absence Requests)	*ExtendedAbsenceContinue* (Extended Absence Request Continue Notification on Homepage)	Extended Absence Request tile	The tile appears for an employee when an employee saves an extended absence request and is yet to be submitted. The tile appears for an absence administrator when the administrator initiates an extended absence request on employee's behalf. **Note:** The Continue With section is available based on the initiator. For example, if the administrator initiates an extended absence request, then it will be available only for administrator and not the employee. The tile is dismissed when the employee or the absence administrator submits the extended absence request.	Image 54

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Absence Management (Leave Donations)	*LeaveDonationContinue* (Leave Donation Continue With Homepage Notification.)	Leave Donation tile	The tile appears when an employee saves a leave donation for later and is yet to be submitted. This is available for Donate Leave and Receive Leave Donation transactions. **Note:** The Continue With section is available based on the initiator. For example, if the manager initiates a leave donation and saves for later, then it will be available only for manager and not the employee. The tile is dismissed when the employee submits the leave donation.	Image 53
Benefits Administration (Benefits Enrollment)	*BenOpenEnrollmentContinueWith* (Benefits Open Enrollment Continue With)	Benefits Enrollment tile	The tile appears when an employee selects the Benefits Enrollment tile on the Suggestions section. When the Open Enrollment period is over, the admin should run the *Dismiss InApp Notifications* process to dismiss the tile. **Note:** When the admin or employee makes an update to the enrollment that dismisses the existing notification and creates a new notification then the text on the tile is updated for the employee based on the new notification.	Image 53

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Benefits Administration (Life Events)	*BenLifeEventContinueWith* (Benefits Life Events Continue With)	Life Event tile (Tile name to display the Life Event Type. For example, for Marriage Event, the tile name is Marriage Event)	The tile appears when the employee initiates a Life Event. The text on the tile gets updated each time when: • The employee makes an update to the Benefits Enrollment page for the Life Event. • The employee exits without uploading the required documents for the Life Event. • The admin denies the document uploaded by the employee for the Life Event. The tile is dismissed when: • The employee cancels the activity guide for the Life Event. • The employee completes the Life Event. • The admin completes or cancels the Life Event activity guide for the employee. • The admin deletes the Life Event activity guide instance for the employee using the Manage Benefits Instance page. • The Life Event period is over (The End Date has surpassed for the Life Event) and the admin runs the *Dismiss InApp Notifications* process. **Note:** When the admin or employee makes an update to the enrollment that dismisses the existing notification and	Image 53

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
			creates a new notification then the text on the tile is updated for the employee based on the new notification.	
Benefits Administration (Dependent Update)	*BenDepDocUploadContinueWith* (Benefits dependent document upload continue with)	Dependent Update tile	The tile appears when: • The employee makes a dependent data change which required document upload. • The admin denies the document uploaded by the employee for the Dependent Update. The tile is dismissed when: • The employee uploads all the required documents and saves the transaction. • The employee makes further dependent data changes that removes the Attachments Missing status. • The admin runs the *Dismiss InApp Notifications* process.	Image 54
Human Resources (PreBoarding and OnBoarding)	*OnBoardingHomePageEmp* (OnBoarding Employee Homepage)	OnBoarding tile	The tile appears when an employee selects the OnBoarding tile on the Suggestion section. The tile is dismissed when the user marks the OnBoarding process as *Complete*.	Image 53
Human Resources (OffBoarding)	*OffBoardingHomePageEmp* (OffBoarding Employee Homepage Employee)	OffBoarding Tile	The tile appears for employees after they select the OfffBoarding tile on the Suggestion section. The tile is dismissed when the user marks the OffBoarding process as *Complete*.	Image 54

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Human Resources (OffBoarding)	*OffBoardingHomePageMgr* (OffBoarding Employee Homepage Manager)	OffBoarding Tile	The tile appears for managers when an OffBoarding event is triggered. • For automatic triggers, it appears when an action of *Termination* has been entered in Job Data for one of their employees. • For manual triggers see PeopleSoft Human Resources Administer Workforce: Manage OffBoarding Event Page. The tile is dismissed when the user marks the OffBoarding process as *Complete*.	Image 54
Human Resources (Position Management)	*InactivePositionContinueWith* (Inactive Position Continue With Notification on Homepage)	Position Inactive	The tile appears when a position is created with a status of *Inactive*. **Note:** The Continue With section is available based on the initiator. For example, if an HR administrator creates a position with a status of *Inactive*, then it will be available only for that HR administrator. The tile is dismissed when: • The position status is changed to *Active*. • The user selects the **Dismiss** button on the View All page or **Edit** button on the Continue With section.	Image 55
Human Resources (Remote Worker Request)	*RemoteWorkerSubmissionHomepage* (Submission reminder for remote work requests)	Remote Worker Request tile	The tile appears when a user has initiated a remote work request. The tile is dismissed when the request has been submitted successfully.	Image 53

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Human Resources (Report Incidents)	*HSReportIncidentInProgressCWHPEmployee* (Report Incident In Progress, Continue With, Homepage, Employee)	Report Incident tile	The tile appears when an employee saves an incident. The tile is dismissed when the employee submits the incident, or deletes it prior to submission.	Image 53
Human Resources (Report Incidents)	*HSReportIncidentMoreInfoCWHPEmployee* (Report Incident More Info, Continue With, Homepage, Employee)	Report Incident tile	The tile appears when approval is required and an administrator pushes back the incident, requesting additional information. The tile is dismissed when the employee resubmits the incident.	Image 53
ePerformance (Performance Review Documents)	*PerformanceDocHPCWEmployee* (Performance Document Homepage Continue With - Employee)	My Performance Documents tile	The tile appears when an employee saves a document. The tile displays the document's last updated date. If multiple documents are saved, the tile shows aggregated results and displays a notification count. The tile is dismissed when: • The employee completes the self-evaluation, • The manager completes or cancels the document, or • The administrator cancels the document. If the tile displays a notification count, the count decreases when the dismissal condition is met for the documents that triggered those notifications.	Image 53 and 54

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
ePerformance (Performance Review Documents)	*PerformanceDocHPCWManager* (Performance Document Homepage Continue With - Manager)	Team Performance Documents tile	The tile appears when a manager saves a team document. When more than one document is saved, the tile shows a count of documents that are in progress. Delegated document count is also displayed if applicable. Documents with a status of *Pending Acknowledgment*, *Acknowledged,* or *Pending Approval* are excluded from this count. The tile is dismissed when: • The administrator cancels the document. • The administrator transfers the document to another manager. If the tile shows a document count, the tile is dismissed when all team documents of the manager are completed or canceled.	Image 53 and 54

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
ePerformance (Performance Review Documents)	*PerformanceDocHPCWParticipant* (Performance Document Homepage Continue With - Participant)	Evaluations of Others tile	The tile appears when an employee saves a document (peer evaluation). If multiple documents are saved, the tile shows aggregated results and displays a notification count. The tile is dismissed when: • The employee completes the peer evaluation, or • The manager completes or cancels the document. • The administrator cancels the document. If the tile shows a notification count, the count decreases when the dismissal condition is met for the documents that triggered those notifications.	Image 53 and 54

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Recruiting (Applications)	*DraftedApplication* (Landing Page Notification for Drafted Internal Applications)	Submit Draft Application tile	The tile appears when an internal applicant initiates a job application (but doesn't complete it). Selecting this tile takes the user to *My Job Applications* page of Candidate Gateway from where they will see only *Drafted Applications* and can continue with their application. The tile is dismissed when: • The applicant submits the application and the application is no longer in drafted status. • The applicant withdraws the drafted application. • The applicant fails pre-screening for a drafted application. • The close date of job posting has reached and the admin runs the *Dismiss InApp Notifications* process. • The applicant selects the *Dismiss* button on the **View All** page or *Edit* button on the **Continue With** section.	Image 53

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Recruiting (Job Openings)	*DraftedJobOpeningLP* (Landing Page Notification for Drafted Job Opening)	Job Opening tile	The tile appears on the **Continue With** section of the Landing Page when a Hiring Manager or a user who does not have access to the Recruiting Dashboard creates a job opening and saves it as draft. Selecting this tile takes the user to the drafted job opening from where they can continue with their transaction. This tile is dismissed when: • The user submits the job opening. • The user deletes the job opening. • The user selects the *Dismiss* button on the **View All** page or *Edit* button on the **Continue With** section. **Note:** If the Hiring Manager has access to the Recruiting Dashboard then this notification is created on the Recruiter's *Continue With* Section of the Recruiting Dashboard and not on the Landing Page.	Image 53

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Product / Business Process	Notification (Description)	Tile	Additional Information	Image Added
Recruiting (Job Offers)	*DraftedOfferLP* (Landing Page Notification For Drafted Offer)	Job Offer tile	The tile appears on the **Continue With** section of the Landing page when a Hiring Manager or a user who does not have access to the Recruiting Dashboard saves a job offer as a draft. Selecting this tile takes the user to the drafted job offer from where they can continue with their transaction. This tile is dismissed when: • The user submits the drafted job offer. • The user selects the *Dismiss* button on the **View All** page or *Edit* button on the **Continue With** section. **Note:** If the Hiring Manager has access to the Recruiting Dashboard then notification will just be created on the Recruiter's *Continue With* Section of the Recruiting Dashboard and not on Landing Page.	Image 53
Time and Labor (Reported Time)	*TimesheetSaveHomePage* (Time Entry)	Time Entry tile	The tile appears when the employee saves a time entry for later or when a manager saves a time entry on employee's behalf. The time entry is yet to be submitted. **Note:** The Continue With section is available based on the initiator. For example, if the manager saves a time entry for later, then it will be available only for manager and not the employee. The tile is dismissed when a saved time entry is submitted by an employee, manager, or admin.	Image 53

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Delivered HCM Notifications and Tiles for Announcements Section

This topic describes the The PeopleSoft My Home Landing Page notifications for Announcements sections.

Table 40-1 HCM Notifications and Tiles for Announcements section

Product / Business Process	Notification	Additional Information	Image Added
Benefits Administration (ACA 1095-C Form)	ACA1095CAnnoun (ACA 1095C Announcement)	The notification appears for an employee when the administrator runs the process to generate the ACA transmittal file(s) and the PDF version of Form 1095-C. The Generate Announcement check box should be enabled when the process is run. The notification is dismissed when the administrator runs the Dismiss InApp Notifications process.	Image 55

Working with PeopleSoft My Home Landing Page Sections

The PeopleSoft Landing Page provides multiple sections that contain groups of functional or administrative tiles.

The following video provides an overview and demonstration of the PeopleSoft Landing Page:

Video: Image Highlights, PeopleSoft HCM Update Image 53: PeopleSoft HCM Example Landing Page

This topic discusses the delivered sections for the PeopleSoft (My Home) Landing Page in PeopleSoft HCM.

For additional information on the Landing Page feature and how to configure landing pages, see *PeopleTools: Portal Technology*, "Developing Advanced Sectionalized Homepages and Dashboard".

Sections Used to Work with the PeopleSoft (My Home) Landing Page

PeopleSoft HCM delivers the following landing page section templates that are addressed in the *Intro To Landing Page Section Layouts for PeopleTools 8.62* document that is available in the PeopleSoft Landing Page knowledge article (KA779) on My Oracle Support.

- Welcome
- Banner
- Suggestions
- Continue With

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- Announcements
- Quick Access
- My Work
- Footer

It is recommended that if you want to modify a template, copy the template in your production system, and modify the copied template for your own use.

> **Important**
>
> Updates made to a section template take effect after the section template is re-imported into the landing page.

Name	Section Template	Usage
PeopleSoft Landing Page - Welcome Section	HC_WELCOME_SCTN_LP (HCM section that displays employee photo and important dates) EOHP_WELCOME_SCTN_LP (displays welcome message, user name, and date)	View a user greeting with the current date information.
PeopleSoft Landing Page - Banner Announcement Section	EOHP_SYSALERT_SCTN_LP displayed via grouplet EOHP_SYSALERT_FL	View important alerts such as system down times, holiday closures, or other information that organizations want users to see when they first log in. When no system message is in place, this section is hidden.
Announcement Details Page	HCSC_ANN_DETAIL_FL (this is the page definition name)	View additional information about the message that appears in the banner announcement.
PeopleSoft Landing Page - Suggestions Section	EOHP_SUGGESTEDACTIONS_SCTN_LP	View and access tasks and processes you have not start but need to complete. These items are triggered notification events that have been assigned to you.
PeopleSoft Landing Page - Continue With Section	EOHP_CONTINUEWITH_SCTN_LP	Identify and access transactions where you still have work to do because you did not complete it, saved it for later, or you have left it in draft status.
PeopleSoft Landing Page - Announcements Section	EOHP_ANNOUNCEMENTS_SCTN_LP	View announcement notifications that broadcast important information to a group of employees.
View All <Suggestions, Continue With, or Announcements> Page	EOHP_VIEWALL_FL (this is the page definition name)	Review all transactions for a section and mark transactions as complete, if the configuration allows it.

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Name	Section Template	Usage
PeopleSoft Landing Page - Quick Access Section	EOHP_QUICKACCESS_SCTN_LP	Access frequently used self-service transactions.
PeopleSoft Landing Page - My Work Section	EOHP_MYWORK_SCTN_LP	Access tiles for common, every day work items for a manager, business analyst, or administrator.
PeopleSoft Landing Page - Recently Visited Section	EOHP_RECENTLYVISITED_SCTN_LP	View and access the last five items you have visited.
PeopleSoft Landing Page - Favorites Section	EOHP_FAVORITES_SCTN_LP	View and access the pages you have saved to your favorites list.
My Favorite Searches Section	EOHP_MYFAVSEARCHES_SCTN_LP	View and access searches you have saved as a favorite search.
Footer Section	EOHP_FOOTER_SCTN_LP	View the footer text.

PeopleSoft Landing Page - Welcome Section

Use the PeopleSoft Landing Page - Welcome section (EOHP_WELCOME_SCTN_LP template) to view a user greeting with the current date information.

Navigation:

The Welcome section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the My Home - Welcome section.



This section can display an uploaded photo of the employee and other types of messages such as birthdays and work anniversaries.

Field or Control	Description
Employee photo	Displays the user's photo when the Display Photo option is enabled on the HCM Options Page. If a photo isn't available, it will display the default system photo image. When disabled, the Welcome section will not show the image but start with the welcome greeting. **Note:** Other systems outside of HCM can view the photo if it is subscribed to the photo service.
Welcome greeting	Displays the text "Welcome" followed by the user's name. Use the Message Catalog to define the text that appears in the welcome message.

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Field or Control	Description
Date	Displays the current day followed by the month, day, and year.

PeopleSoft Landing Page - Banner Announcement Section

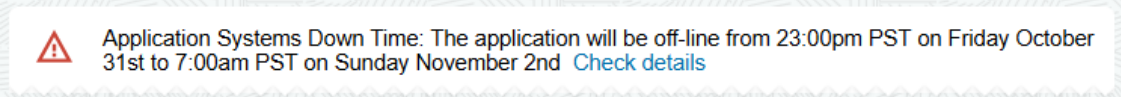
Use the Banner Announcement section (EOHP_SYSALERT_SCTN_LP template displayed via grouplet EOHP_SYSALERT_FL) to view important alerts such as system down times, holiday closures, or other information that organizations want users to see when they first log in.

> **Note**
>
> The PeopleSoft Landing Page displays this section when an important system announcement is in place. The section displays only one system message at a time. When no system message is in place, this section is hidden.

Navigation:

The Banner Announcement section is part of the PeopleSoft (My Home) Landing Page when a system announcement is available.

This example illustrates the fields and controls on the Banner Announcement section.



This section displays the announcement sent with the *Banner Announcement* category in Notification Publisher, typically for system-wide distribution. For more information, see Enterprise Components: Setting Up and Publishing Notifications.

When more than one announcement is active, the page displays the announcement with the highest importance. If more than one notification has the same importance level, the most recent message appears.

When an announcement changes while the user is on this page, the section leverages the PeopleTools Event Aware grouplet functionality, enabling the banner announcement to update without the need to reload the page. For more information on grouplet-based tile styling, see *PeopleTools: Portal Technology*: "Developing Advanced Sectionalized Homepages and Dashboards," Designing Sections and Tile.

Field or Control	Description
Check Details link	Select this link to access the Announcement Details Page and view additional information about this announcement.

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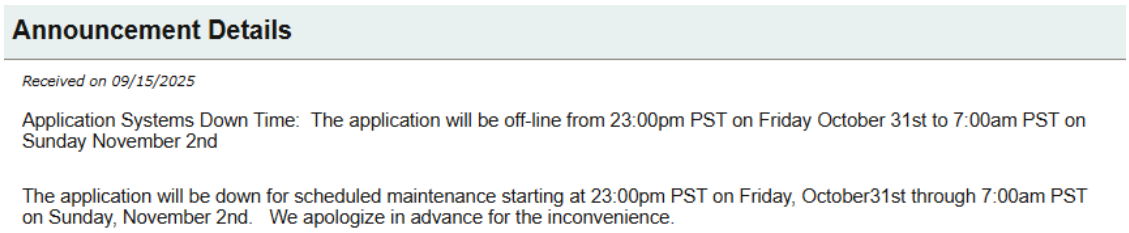
Announcement Details Page

Use the Announcement Details page (HCSC_ANN_DETAIL_FL) to view additional information about the message that appears in the banner announcement.

Navigation:

Select the **Check details** link in the PeopleSoft Landing Page - Banner Announcement Section.

This example illustrates the fields and controls on the Announcement Details page.



PeopleSoft Landing Page - Suggestions Section

Use the Suggestions section (EOHP_SUGGESTEDACTIONS_SCTN_LP template) to view and access tasks and processes you have not started but need to complete.

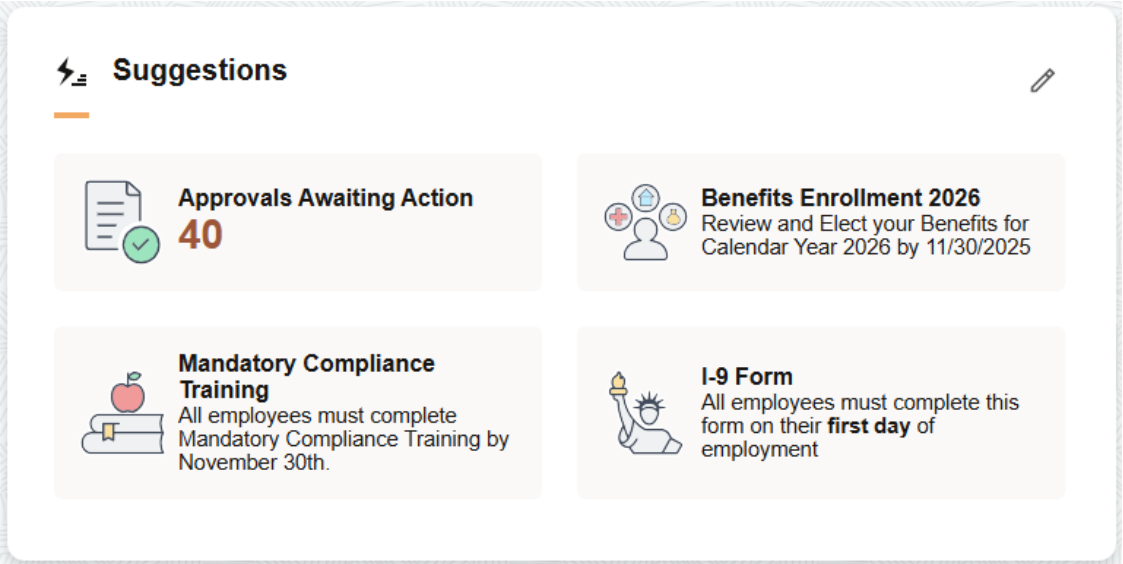
> **Note**
>
> Tiles that appear in this section can be either dynamic content sources from notifications or CREF tiles, such as the **Approvals Awaiting Action** tile.

Navigation:

The Suggestions section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Suggestions section.

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Use this section to view and access reminders of tasks you need to complete or address. When the number of tiles exceed those that fit in the section tile, the section displays the **View All** link. The number of tiles that appear in the section is controlled by CSS styles for the section template and the device's form factor.

When you have no outstanding tasks to perform and are not an approver, the section displays the text "All caught up!". Ongoing tasks that you did not complete move to the PeopleSoft Landing Page - Continue With Section.

For a list of delivered notifications that call the tiles that appear in this section, see Delivered HCM Notifications and Tiles for Suggestions Section.

Suggestions Tile	See Also
Approvals Awaiting Action tile	This tile is derived from Approvals and displays the number of pending approvals requiring your attention. The image, text, description, and target URL are defined in the Notification Composer. For more information, see the Enterprise Components: Creating and Managing Notifications with Notification Composer.

> **Note**
>
> Other notifications shown in this section do not require separate security for the tiles like CREF security for Approvals. As long as there is a notification within the section, it will appear.

The following lists the common controls in this section:

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Field or Control	Description
(Edit Suggestions) icon	Select this icon to access the View All Suggestions page (see View All <Suggestions, Continue With, or Announcements> Page) to view a list of all items in the Suggestions section and dismiss tiles, where applicable.
View All link	This option appears when the number of tiles exceed those that fit in the section. Select this link to access the View All Suggestions page and review the full list of suggested items.

Viewing Aggregate Results

When aggregate results is enabled for a notification, the system consolidates multiple transactions of the same notification types onto one tile with a count of the number of transactions. Select the tile to view a list of all transactions for this notification type. For more information on configuring notifications with aggregate results, see Enterprise Components: Creating and Managing Notifications with Notification Composer.

PeopleSoft Landing Page - Continue With Section

Use the Continue With section (EOHP_CONTINUEWITH_SCTN_LP template) to identify and access transactions where you still have work to do because you did not complete it, saved it for later, or you have left it in draft status.

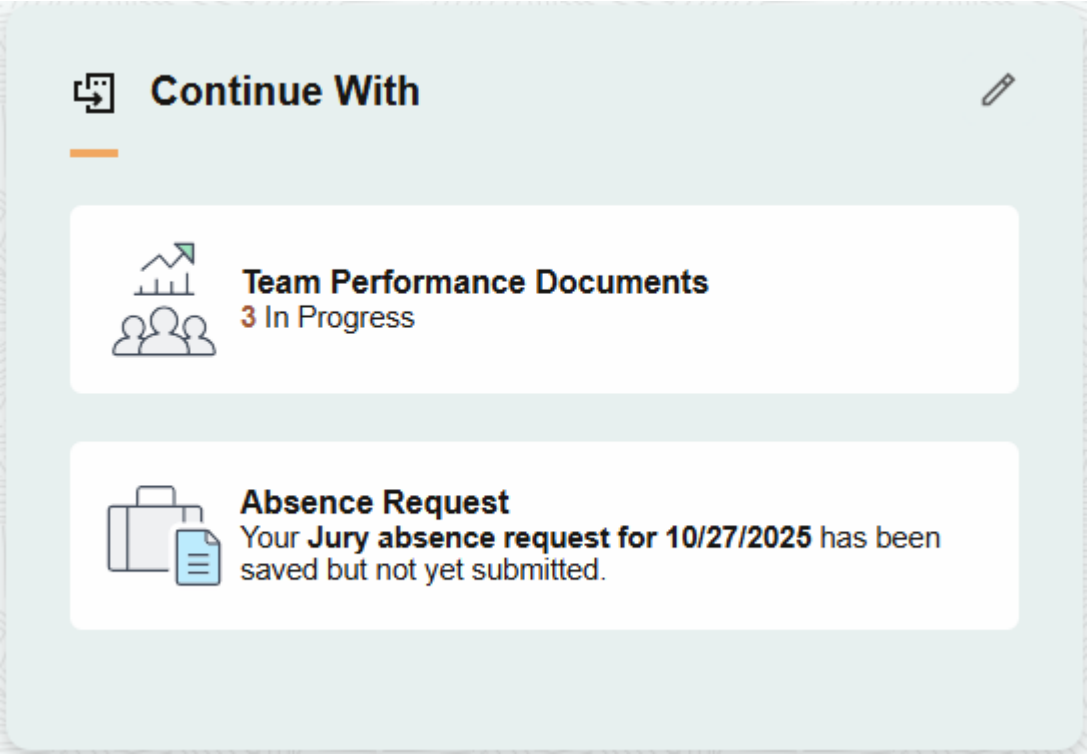
> **Note**
>
> Tiles that appear in this section are dynamic notification tiles.

Navigation:

The Continue With section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Continue With section.

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This section provides quick navigation back to unfinished transactions.

Once the task is submitted or completed, the task is removed from the Continue With section and the section displays the text "All caught up!".

Tiles that appear in this section may come from starting tasks that appeared in the Suggestions tile or from starting other transactions that you did not complete. When the number of tiles exceed those that fit in the section tile, the section displays the **View All** link. The number of tiles that appear in the section is controlled by CSS styles for the section template and the device's form factor.

For a list of delivered notifications that call the tiles that appear in this section, see Delivered HCM Notifications and Tiles for Continue With Section.

Field or Control	Description
(Edit Continue With) icon	Select this icon to access the View All Continue With page (see View All <Suggestions, Continue With, or Announcements> Page) to view a list of all the items in the Continue With section, and dismiss tiles, where applicable.
View All link	This option appears when the number of tiles exceed those that fit in the section. Select this link to access the View All Continue With page and review the full list of ongoing items.

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> **Note**
>
> Notifications shown in this section do not require separate security for the tiles.

Viewing Aggregate Results

When aggregate results is enabled for a notification, the system consolidates multiple transactions of the same notification type onto one tile with a count of the number of transactions. Select the tile to view a list of all transactions for this notification. For more information on configuring notifications with aggregate results, see Enterprise Components: Creating and Managing Notifications with Notification Composer.

PeopleSoft Landing Page - Announcements Section

Use the Announcements section (EOHP_ANNOUNCEMENTS_SCTN_LP template) to view announcement notifications that broadcast important information to groups of employees.

Navigation:

The Announcements section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Announcements section.



This section displays notifications typically sent using Notification Publisher, and displays data that is contextual to the logged-in user. Announcement notifications can contain rich text, images, and embedded links for PeopleSoft or external transactions. For more information on setting up notifications, see the Enterprise Components: Understanding Notification Composer and Enterprise Components: Understanding Notification Publisher documentation.

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When the number of tiles exceed those that fit in the section tile, the section displays the **View All** link. The number of tiles that appear in the section is controlled by CSS styles for the section template and the device's form factor.

Field or Control	Description
(Edit Announcements) icon	Select this icon to access the View All <Suggestions, Continue With, or Announcements> Page to view all the items in the Announcements section.

For more information on creating announcements, see Enterprise Components: Setting Up and Publishing Notifications.

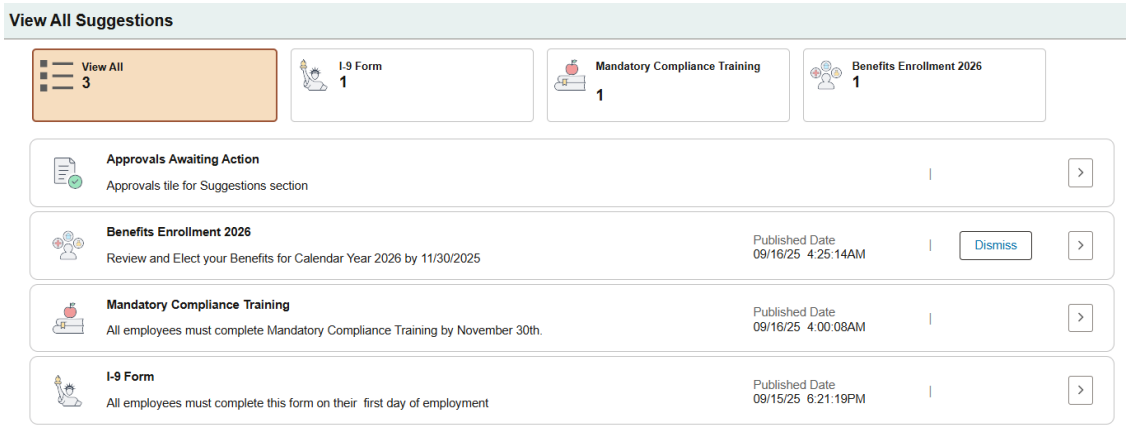
View All <Suggestions, Continue With, or Announcements> Page

Use the View All Suggestions, View All Continue With, or View All Announcements page (EOHP_VIEWALL_FL) to review all transactions for a section and mark transactions as complete, if the configuration allows it.

Navigation:

Select the View All (pencil) icon from the **Suggestions**, **Continue With**, or **Announcements** section.

This example illustrates the fields and controls on the View All Suggestions page. The View All Continue With and View All Announcements page work similar to this page.



Use this page to view all transactions that require your attention. The page varies based on the configuration settings and the type of transactions that are available.

(Suggestions and Continue With sections) The top of the page displays filters that enable you to view all transactions or select individual filter tiles to narrow your view by transaction type. Each tile displays the number of transactions that apply to that transaction type. When using a mobile device, the filters are available as a drop-down field and will appear only if there is more than one transaction type in the results.

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> **Note**
>
> Filter tiles are not available for static tiles displayed in the dynamic sections (like Approvals Awaiting Action) or the Announcements section.

Field or Control	Description
Dismiss button	Select this button to mark a transaction complete and dismiss the suggested action. This button is available when the **Show Mark Complete** option is selected on the Enterprise Components: Compose Notification - Define Message Content - In-App Page.
(More) arrow icon button	Select this button to access the transaction page to view or update information.

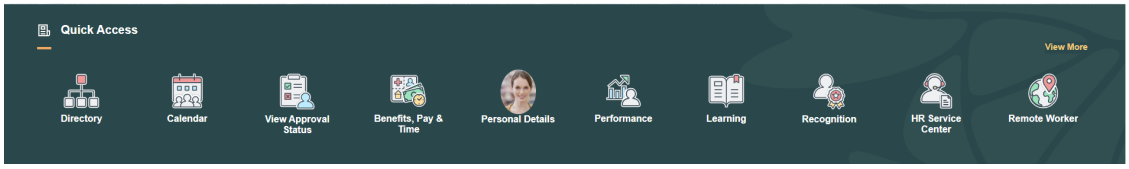
PeopleSoft Landing Page - Quick Access Section

Use the Quick Access section (EOHP_QUICKACCESS_SCTN_LP template) to access frequently used self-service transactions.

Navigation:

The Quick Access section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Quick Access section when it is collapsed.



The following links appear if the total tile item count exceeds those that fit in the section. The number of tiles that appear in the section is controlled by a property in the section template.

Field or Control	Description
View More link	Select to expand the Quick Access section to show all tiles.
View Less link	Select to collapse the Quick Access section to show one row of tiles.

The following are the delivered tiles that can appear in the Quick Access section of the PeopleSoft Landing page. PeopleTools CREF security controls which of these items are displayed or hidden.

- PeopleSoft Human Resources Administer Workforce: Directory Tile
- PeopleSoft Absence Management: Calendar Tile

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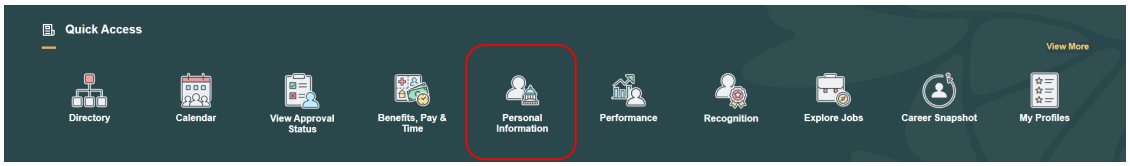
- View Approval Status Tile
- Quick Access – Benefits, Pay & Time Tile
- Quick Access - Personal Details Tile
- PeopleSoft ePerformance: Performance Tile
- Learning Tile (See *PeopleSoft HCM: Enterprise Learning Management* documentation)
- Recognition Tile
- HR Service Center Tile (See *PeopleSoft CRM: Call Center Applications* documentation)
- PeopleSoft eProfile: Remote Worker Tile (for Employees)
- Explore Jobs Tile (see PeopleSoft Candidate Gateway: Explore Jobs Page)
- PeopleSoft eProfile: Career Snapshot Tile
- PeopleSoft eDevelopment: My Profiles Tile
- PeopleSoft Human Resources Monitor Health and Safety: Health and Safety Tile

(USF) Quick Access Section for U.S. Federal Employees

When a U.S. federal user accesses the landing page, the Quick Access section displays the Quick Access - Personal Information Tile instead of the Personal Details tile.

> **Note**
>
> All other tiles in the **Quick Access** section work the same for Federal employees as they do for commercial employees.

This example illustrates the fields and controls on the Quick Access section when it is collapsed.



Select the tile to access the Personal Information Dashboard.

Related Topics

- (USF) Using the Quick Access - Personal Information Dashboard as a Federal Employee
  This topic describes the delivered sections and tiles for the federal employee Quick Access - Personal Information dashboard.

PeopleSoft Landing Page - My Work Section

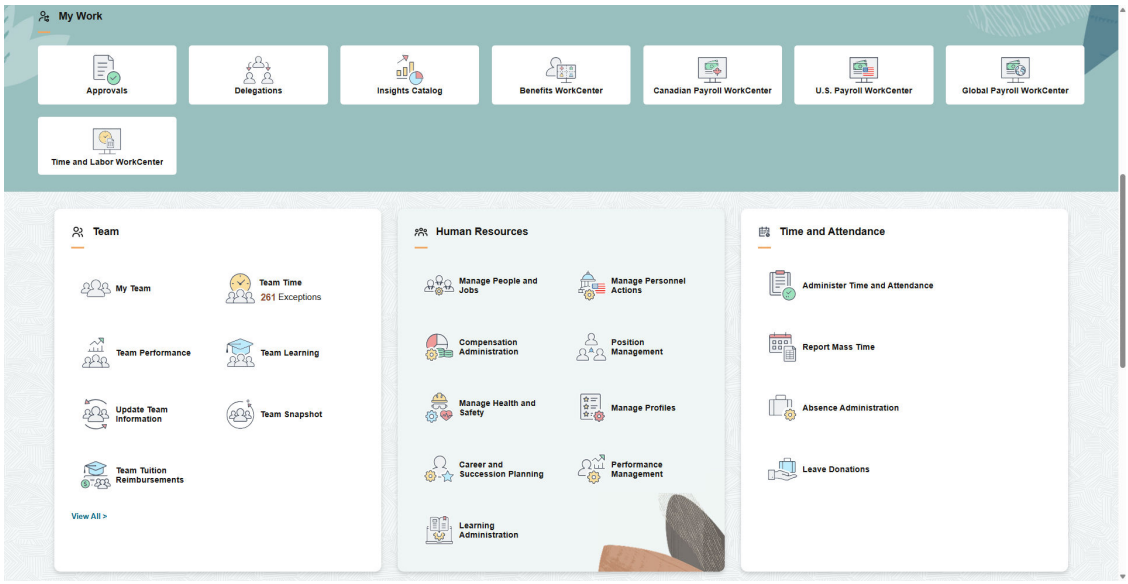
Use the My Work section (EOHP_MYWORK_SCTN_LP template) to access tiles for common, every day work items for a manager, business analyst, or administrator.

Navigation:

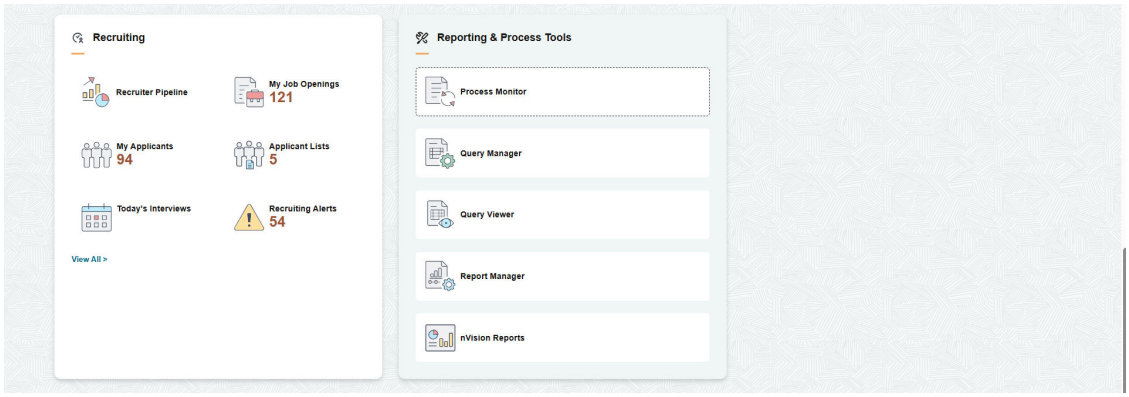
The My Work section is part of the PeopleSoft (My Home) Landing Page.

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This example illustrates the fields and controls on the My Work (1 of 2).



This example illustrates the fields and controls on the My Work (2 of 2).



The My Work section consists of multiple sections and varies based on roles and permissions.

My Work: Tiles

The top row of the My Work section displays a standard set of common tiles for managers and administrators. The following are the delivered tiles that can appear in this section:

- Approvals Tile (Fluid Approvals)
- Enterprise Components: Delegations Tile
- Insights Catalog Tile
- PeopleSoft Benefits Administration: Benefits WorkCenter Tile
- PeopleSoft Payroll for North America: CAN Payroll WorkCenter Tile
- PeopleSoft Payroll for North America: U.S. Payroll WorkCenter Tile
- PeopleSoft Global Payroll: Global Payroll WorkCenter Tile
- PeopleSoft Time and Labor: Time and Labor WorkCenter Tile

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- PeopleSoft Absences Management: Absence WorkCenter Tile

My Work: Sections

The My Work section displays additional subsections for managers and administrators. The following are the delivered subsections that can appear in the My Work section:

- My Work - Team Section

  This includes the Team Dashboard when you select the **View All** link.

- My Work - Human Resources Section

  This includes the:

  – Manage People and Jobs Dashboard when you select the **Manage People and Jobs** tile.

  – (USF) Manage Personnel Actions Dashboard when you select the **Manage Personnel Actions** tile.

- My Work - Time and Attendance Section

  This includes the Administer Time and Attendance Dashboard when you select the **Administer Time and Attendance** tile.

- My Work - Recruiting Section

  This includes the Recruiting Dashboard when you select the **View All** link.

- Using the My Work - Reporting & Process Tools Section

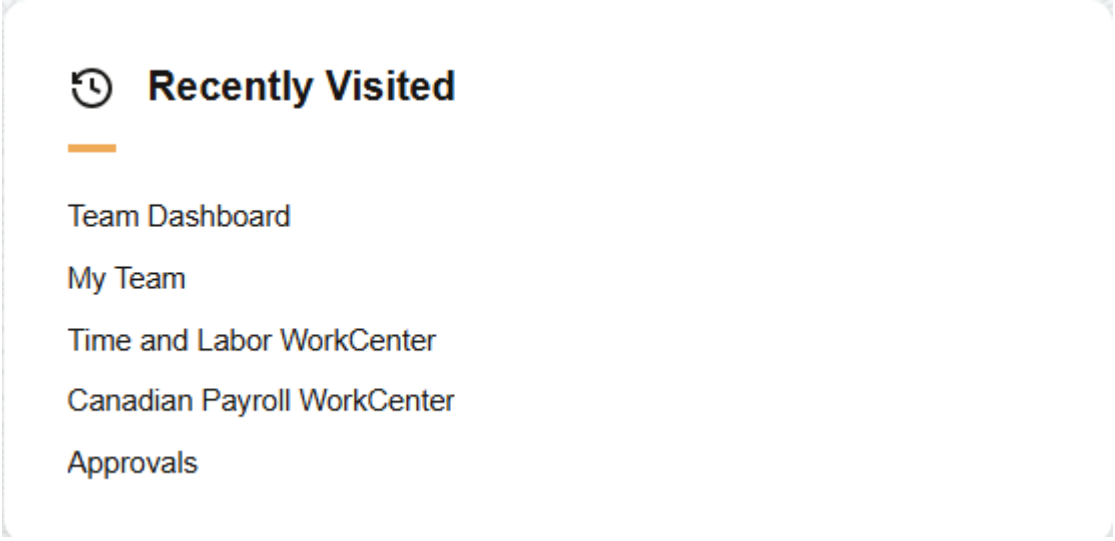
PeopleSoft Landing Page - Recently Visited Section

Use the Recently Visited section (EOHP_RECENTLYVISITED_SCTN_LP template) to view and access the last five items you have visited.

Navigation:

The Recently Visited section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Recently Visited section.



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Select a link to return to one of your recently accessed pages.

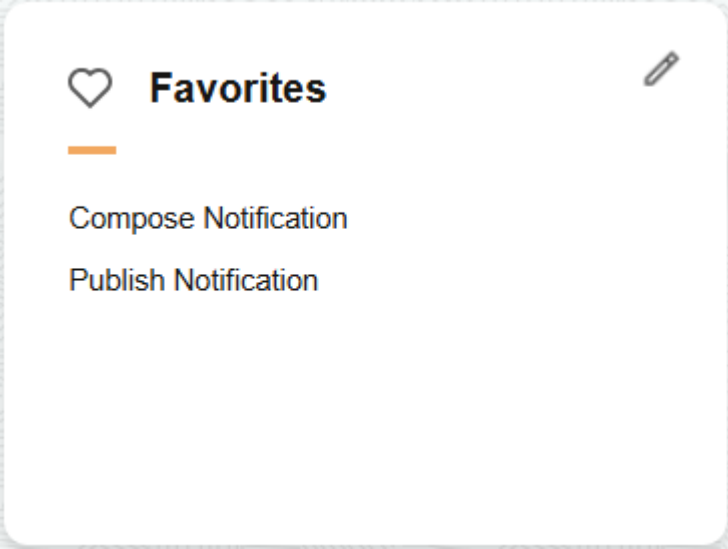
PeopleSoft Landing Page - Favorites Section

Use the Favorites section (EOHP_FAVORITES_SCTN_LP template) to view and access the pages you have saved to your favorites list.

Navigation:

The Favorites section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Favorites section.



Field or Control	Description
(Edit Favorites) pencil icon	Select this icon to access the Edit Favorites Page and view a full list of favorites, make modifications to a link name, or delete a link.

My Favorite Searches Section

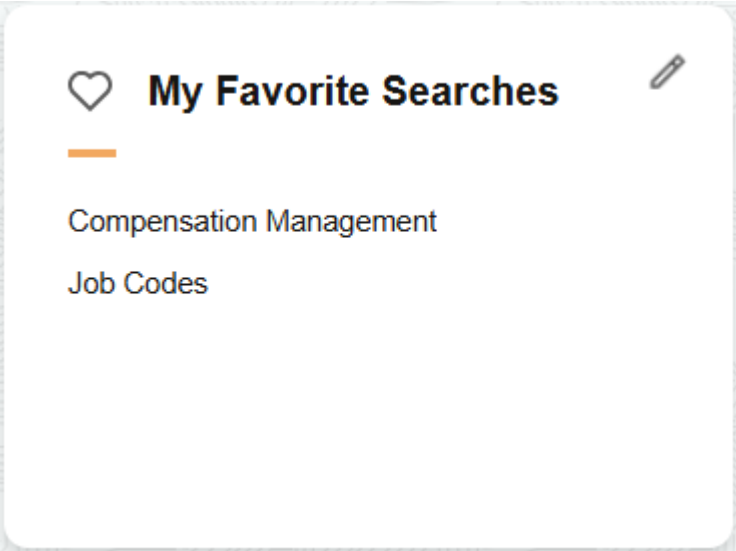
Use the My Favorite Searches section (EOHP_MYFAVSEARCHES_SCTN_LP template) to view and access searches you have saved as a favorite search.

Navigation:

The My Favorite Searches section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the My Favorite Searches section.

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Use this section to access searches you saved from a search transaction page as a favorite.

Field or Control	Description
(edit My Favorite Searches) pencil icon	Select this icon to access the My Favorite Searches Page and view a full list of saved searches.

Footer Section

Use the Footer section (EOHP_FOOTER_SCTN_LP section template) to view the footer text.

Navigation:

The My Favorite Searches section is part of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Footer section.



Use the Message Catalog to define the text that appears in the footer.

Using the Quick Access – Benefits, Pay & Time Dashboard as an Employee

This topic describes the delivered sections and tiles for the employee Quick Access - Benefits, Pay & Time dashboard.

The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

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Pages Used on the Employee Quick Access – Benefits, Pay & Time Dashboard

Name	Definition Name	Usage
Quick Access – Benefits, Pay & Time Tile	HC_BEN_PAY_TIME_DB_FL (this is the cref for the tile)	Access the Benefits, Pay & Time dashboard.
Quick Access – Benefits, Pay & Time Dashboard	HC_BEN_PAY_TIME_DBRD_LP	Access self-service content and navigation from Time & Labor, Absence Management, Payroll, Year End Forms or Slips, Benefits, and Compensation.

Quick Access – Benefits, Pay & Time Tile

Use the Benefits, Pay & Time tile (HC_BEN_PAY_TIME_DB_FL) to access the Benefits, Pay & Time dashboard to manage work-related information for yourself related to these areas.

Navigation:

The Benefits, Pay & Time tile is part of the Quick Access section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Benefits, Pay & Time tile.



Select this tile to access the Quick Access – Benefits, Pay & Time Dashboard.

Quick Access – Benefits, Pay & Time Dashboard

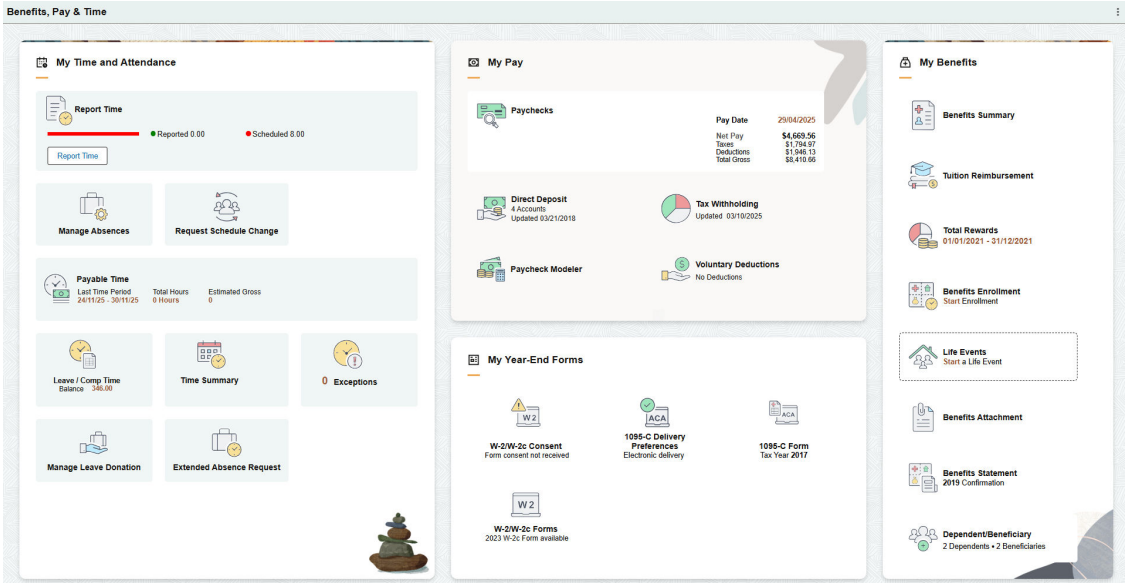
Use the Benefits, Pay & Time dashboard (HC_BEN_PAY_TIME_DBRD_LP) to access self-service content and navigation from Time & Labor, Absence Management, Payroll, Year End Forms or Slips, Benefits, and Compensation.

Navigation:

Select the Benefits, Pay & Time tile from the Quick Access section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Benefits, Pay & Time dashboard.

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The **Benefits, Pay & Time** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **My Time and Attendance** section
  - PeopleSoft Time and Labor: Report Time Tile
  - PeopleSoft Absence Management: Manage Absences Tile
  - PeopleSoft Time and Labor: Request Schedule Change Tile
  - PeopleSoft Time and Labor: Payable Time Tile
  - PeopleSoft Time and Labor: Leave / Comp Time Tile
  - PeopleSoft Time and Labor: Time Summary Tile
  - Exceptions Tile (see PeopleSoft Time and Labor: View Exceptions Page)
  - PeopleSoft Absence Management: Manage Leave Donation Tile
  - PeopleSoft Absence Management: Extended Absence Request Tile
- **My Pay** section

  (Payroll for North America – USA)
  - Paychecks Tile (see PeopleSoft ePay: Paychecks Page)
  - Tax Withholding Tile (see PeopleSoft ePay: Tax Withholding Page)
  - PeopleSoft ePay: Paycheck Modeler Tile

  (Payroll for North America – CAN)
  - Paycheques Tile (see PeopleSoft ePay: Paychecks Page)
  - Tax Withholding Canada Tile (see PeopleSoft ePay: Tax Withholding Page)

  (Payroll for North America – Common)
  - Direct Deposit Tile (see PeopleSoft ePay: Direct Deposit Page)
  - Voluntary Deductions Tile (see PeopleSoft ePay: Voluntary Deductions Page)

  (Global Payroll Core)

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- PeopleSoft ePay: Payslips Tile
- PeopleSoft ePay: Banking Tile

(Global Payroll - India)

- PeopleSoft Global Payroll for India: Tax Savings Declarations PageTax Savings Declarations Tile
- PeopleSoft Global Payroll for India: 12BAA Declarations IND Page12BAA Declaration Tile

(Global Payroll - Mexico)

PeopleSoft Global Payroll for Mexico: Viewing PayslipsXML Payslip Tile

(Global Payroll - USA)

PeopleSoft Payroll for North America: (USA) Entering U.S. Employee Tax DataW-4 Tax Information MIL Tile

(Global Payroll - UK)

PeopleSoft ePay: (GBR) Viewing Payslips OnlinePayslip Tile

- **My Benefits** section
  - PeopleSoft Benefits Administration: Benefits Summary Tile
  - PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement Tile (for Employees)
  - PeopleSoft Human Resources Administer Compensation: Total Rewards Tile
  - PeopleSoft Benefits Administration: Benefits Enrollment Tile
  - PeopleSoft Benefits Administration: Life Events Tile
  - PeopleSoft Benefits Administration: Benefits Attachment Tile
  - PeopleSoft Benefits Administration: Benefits Statement Tile
  - PeopleSoft Benefits Administration: Dependent/Beneficiary Tile
- **My Year-End Forms** section

> **Note**
>
> This section is for U.S. employees only. All section tiles are displayed according to the permissions assigned to each eligible user.

  - W-2/W-2c Consent Tile (see PeopleSoft ePay: W-2/W-2c Consent Page)
  - W-2/W-2c Forms Tile (see PeopleSoft ePay: View W-2/W-2c Forms Page)
  - PeopleSoft Benefits Administration: 1095-C Delivery Preferences Tile
  - PeopleSoft Benefits Administration: 1095-C Form Tile
  - 1042-S Consent Tile (see PeopleSoft ePay: 1042-S Consent Page)
  - 1042-S Forms Tile (see PeopleSoft ePay: View Form 1042-S Page)
  - 1099-R Consent Tile (see PeopleSoft ePay: 1099-R Consent Page)
  - 1099-R Forms Tile (see PeopleSoft ePay: View 1099-R Forms Page)
  - PeopleSoft ePay: (USA) Managing W-4 and W-2 ReissueW-2 Reissue Request MIL

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- Payroll Reports

- **My Year-End Slips** section

> **Note**
>
> This section is for Canadian employees only. All section tiles are displayed according to the permissions assigned to each eligible user.

  - RL-1/RL-2 Consent Tile
  - RL-1/RL-2 Slips Tile
  - T4/T4A Consent Tile
  - T4/T4A Slips Tile

  For more information on all these tiles for Canadian Year-End forms, see PeopleSoft ePay: (CAN) Using the PeopleSoft Fluid User Interface to Manage Consent for Electronic Year-End Forms.

Using the Quick Access - Personal Details Dashboard as an Employee

This topic describes the delivered sections and tiles for the employee Quick Access - Personal Details dashboard.

The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

Pages Used on the Quick Access - Personal Details Dashboard for Employees

Name	Definition Name	Usage
Quick Access - Personal Details Tile	HC_HR_PERS_DTLS_FL_DBRD_L_LINK (this is the cref for this tile)	Access the Personal Details dashboard.
Personal Details Dashboard	HC_HR_PERS_DTLS_FL_DBRD_LP	Access self-service content and navigation items for biographical, contact, compliance, equality, disability, and other data.

Quick Access - Personal Details Tile

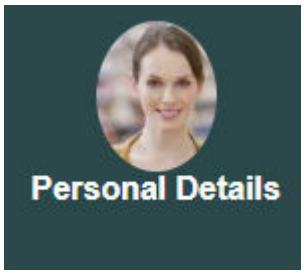
Use the Personal Details tile (HC_HR_PERS_DTLS_FL_DBRD_L_LINK) to access the Personal Details dashboard.

Navigation:

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The Personal Details tile is part of the Quick Access section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Personal Details tile.



This tile displays the employee photo stored in HR. If no photo is available, it shows a system default image.

Select this tile to access the Personal Details Dashboard.

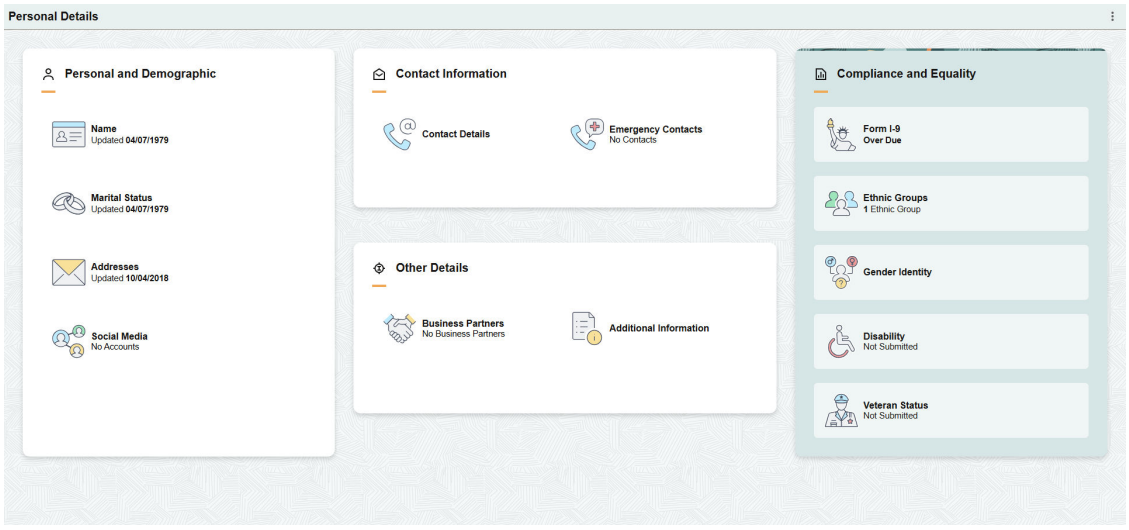
Personal Details Dashboard

Use the Personal Details dashboard to access self-service content and navigation items for biographical, contact, compliance, equality, disability, and other data.

Navigation:

Select the Personal Details tile from the Quick Access section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Personal Details dashboard.



The **Personal Details** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Personal and Demographic** section

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  - Name Tile
  - Marital Status Tile
  - Addresses Tile
  - Social Media Tile
- **Contact Information** section
  - Contact Details Tile
  - Emergency Contacts Tile
- **Other Details** section
  - Business Partners Tile
  - Additional Information Tile
- **Compliance and Equality** section
  - Form I-9 Tile
  - Ethnic Groups Tile
  - Gender Identity Tile
  - Disability Tile
  - Veteran Status Tile

For more information on these tiles, see PeopleSoft eProfile: (Fluid) Reviewing and Updating Personal Information.

(USF) Using the Quick Access - Personal Information Dashboard as a Federal Employee

This topic describes the delivered sections and tiles for the federal employee Quick Access - Personal Information dashboard.

This video provides an overview of the Federal Landing Page enhancements:

Video: Image Highlights, PeopleSoft HCM Update Image 54: U.S. Federal Landing Page Enhancements

Pages Used on the Quick Access - Personal Information Dashboard for Federal Employees

Page Name	Definition Name	Usage
Quick Access - Personal Information Tile	HC_GVT_PERS_DTLS_FL_GBL_LINK (this is the cref for this tile)	Access the Personal Information dashboard as a federal employee.
Personal Information Dashboard	HC_GVT_PERS_INFO_FL_DBRD_LP	Access self-service content and navigation items for biographical, contact, compliance, equality, disability, and other data as a federal employee.

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Quick Access - Personal Information Tile

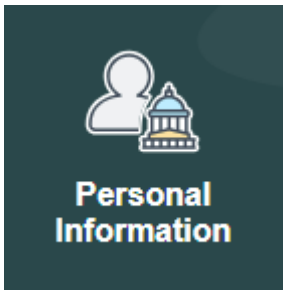
Use the Personal Information tile to access the Personal Information dashboard as a federal employee.

> **Note**
>
> A user must be identified as a federal employee with the *HCLPSSUSFPERSINFO - Personal Information Federal* permission list to see and access this tile.

Navigation:

The Personal Information tile is part of the Quick Access section of the PeopleSoft (My Home) Landing Page for federal employees.

This example illustrates the Personal Information tile.



Select this tile to access the Personal Information Dashboard.

Personal Information Dashboard

Use the Personal Information dashboard to access self-service content and navigation items for biographical, contact, compliance, equality, disability, and other data as a federal employee.

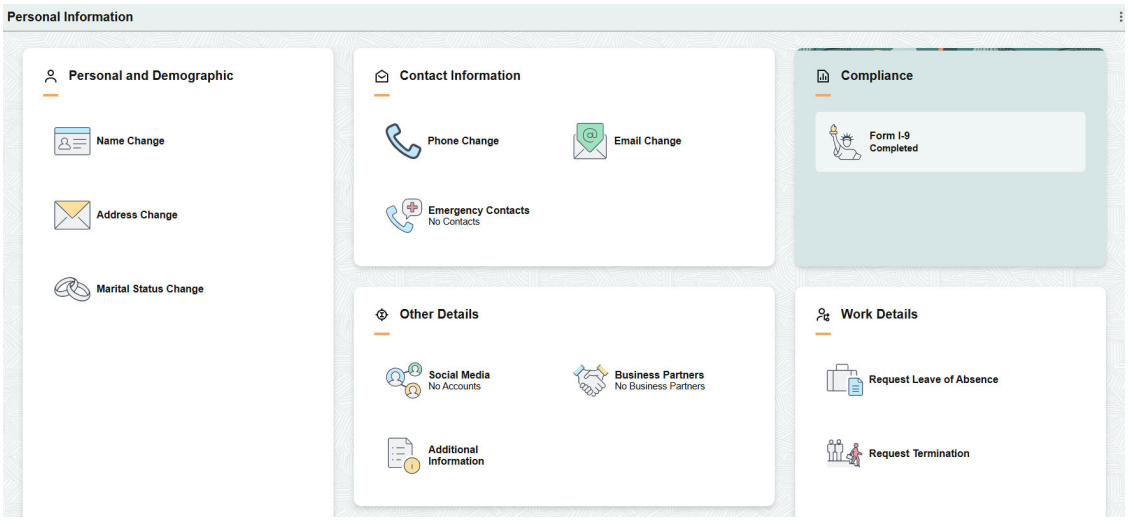
> **Note**
>
> A user must be identified as a federal employee with the *HCLPSSUSFPERSINFO - Personal Information Federal* permission list to see and access this tile.

Navigation:

Select the Personal Information tile from the Quick Access section of the PeopleSoft (My Home) Landing Page when you are logged in as a federal employee.

This example illustrates the Personal Information dashboard.

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The **Personal Information** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Personal and Demographic** section

  These tiles take you to the Classic federal self-service pages to update PAR records.

  - Name Change tile
  - Addresses Change tile
  - Marital Status Change tile
- **Contact Information** section

  The phone tile takes you to the Classic federal page while the email and emergency contact tiles take you to the Fluid self-service pages.

  - Phone Change tile
  - Email Change tile (see the Fluid PeopleSoft eProfile: Email Address Page)
  - Emergency Contacts tile (see the Fluid PeopleSoft eProfile: Emergency Contacts (Summary) Page)
- **Compliance** section

  Form I-9 tile (see the Fluid PeopleSoft eProfile: (USA) Form I-9 Page)
- **Other Details** section

  These tiles take you to the Fluid self-service pages.

  - Social Media tile (see the Fluid PeopleSoft eProfile: Social Media (Summary) Page)
  - Business Partners tile (see the Fluid PeopleSoft eProfile: Business Partners Page)
  - Additional Information tile (see the Fluid PeopleSoft eProfile: Additional Information Page
- **Work Details** section

  These tiles take you to the Classic federal self-service pages.

  - Request Leave of Absence tile
  - Request Termination tile

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Many of the Classic federal transaction pages are listed in the following documentation.

- PeopleSoft eProfile: (Classic) Reviewing and Updating Personal Information
- PeopleSoft eProfile: (USF) Requesting Leave of Absences
- PeopleSoft eProfile: (USF) Requesting Termination
- Understanding WIP Management System Setup

Related Topics

- Using the Quick Access - Personal Details Dashboard as an Employee
  This topic describes the delivered sections and tiles for the employee Quick Access - Personal Details dashboard.

Using the My Work - Team Dashboard as a Manager

This topic describes the delivered sections and tiles for the manager My Work - Team section and dashboard.

The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

Pages Used for the My Work - Team Dashboard for Managers

Name	Definition Name	Usage
My Work - Team Section	HC_MYTEAM_SCTN_LP	Access common content and navigation items for managers to view and update their direct and indirect reports.
Team Dashboard	HC_MYTEAM_FL_DBRD_LP	Access a consolidated self-service view for managers to manage approvals, attendance, recognitions, development, and information for existing and new team members.

My Work - Team Section

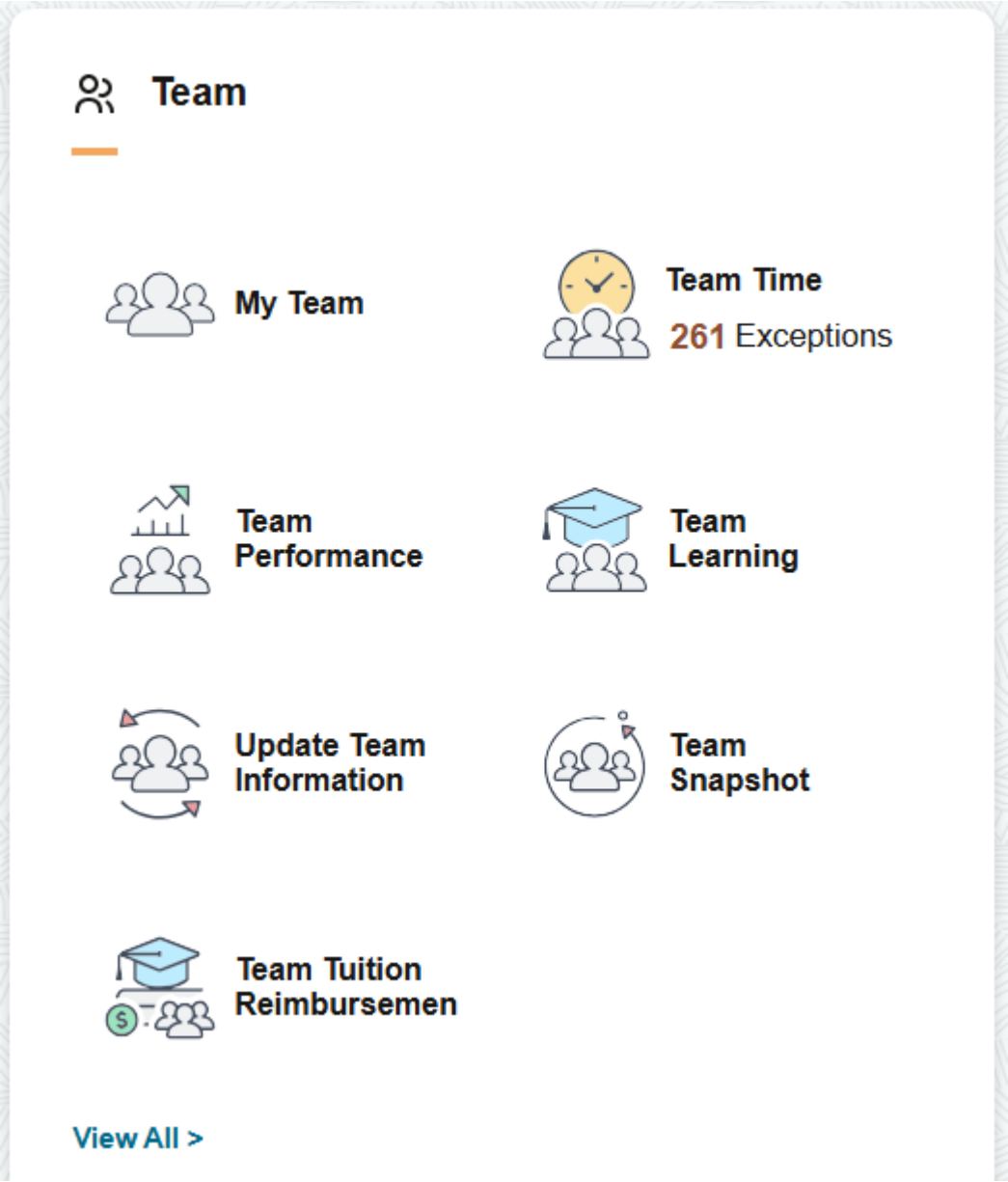
Use the My Work - Team section (HC_MYTEAM_SCTN_LP) to access common content and navigation items for managers to view and update their direct and indirect reports.

Navigation:

The Team section is part of the My Work section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Team section.

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The section displays a selection of common tiles that managers may access to track and maintain their team information and includes the following tiles, which appear based on user roles and security permissions.

- PeopleSoft eProfile Manager Desktop: My Team Tile
- PeopleSoft Absence Management: Team Time Tile
- PeopleSoft ePerformance: Team Performance Tile
- Team Learning (see *PeopleSoft HCM: Enterprise Learning Management* documentation)
- PeopleSoft eProfile Manager Desktop: Update Team Information Tile
- PeopleSoft eProfile Manager Desktop: (Manager) Team Snapshot Tile
- PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Team Tuition Reimbursements Tile (for Managers)

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Field or Control	Description
View All	Select the **View All** link to access the Team Dashboard and view all tiles to manage the team data and transactions.

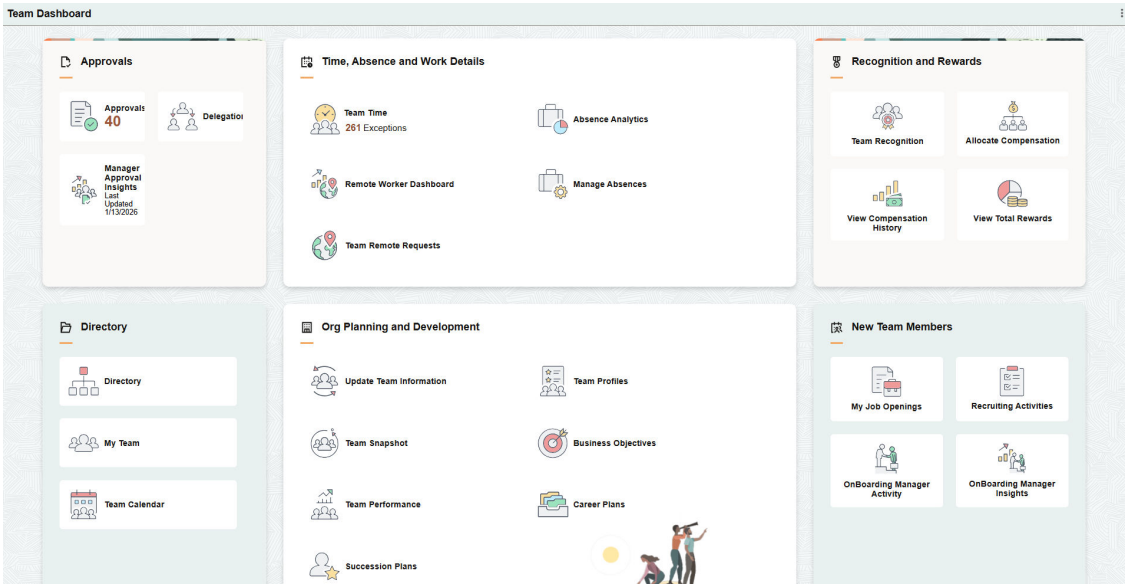
Team Dashboard

Use the Team dashboard (HC_MYTEAM_FL_DBRD_LP) to access a consolidated self-service view for managers to manage approvals, attendance, recognitions, development, and information for existing and new team members.

Navigation:

Select the **View All** link from the My Work - Team section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Team dashboard.



The **Team** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Approvals** section:
  - Approvals Tile (Fluid Approvals)
  - Enterprise Components: Delegations Tile
  - Manager Approval Insights Tile (for Managers)
- **Time, Absence and Work Details** section
  - PeopleSoft Absence Management: Team Time Tile
  - PeopleSoft Absence Management: Absence Analytics Tile
  - PeopleSoft Human Resources Administer Workforce: Remote Worker Dashboard Tile (for Managers)

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  - Manage Absences Tile (see PeopleSoft Absence Management: Manage Absences (Select Employee) Page)
  - Team Remote Requests Tile (see PeopleSoft eProfile Manager Desktop: Team Remote Request Tile)
- **Recognition and Rewards** section
  - Team Recognition Tile
  - Allocate Compensation Tile (see PeopleSoft eCompensation Manager Desktop: Allocate Compensation Page)
  - View Compensation History Tile (see PeopleSoft eCompensation Manager Desktop: View Compensation History Page (Fluid Manager View))
  - PeopleSoft Human Resources Administer Compensation: View Total Rewards Tile
- **Directory** section
  - PeopleSoft Human Resources Administer Workforce: Directory Tile
  - PeopleSoft eProfile Manager Desktop: My Team Tile
  - PeopleSoft Absence Management: Team Calendar Tile
- **Org Planning and Development** section
  - PeopleSoft eProfile Manager Desktop: Update Team Information Tile
  - PeopleSoft eProfile Manager Desktop: (Manager) Team Snapshot Tile
  - PeopleSoft ePerformance: Team Performance Tile
  - Succession Plans Tile (see PeopleSoft Human Resources Plan Careers and Successions: Manage Succession Plans Page
  - PeopleSoft eDevelopment: Team Profiles Tile
  - PeopleSoft ePerformance: Business Objectives Tile
  - Career Plans Tile (see PeopleSoft Human Resources Plan Careers and Successions: Manage Career Plans Component)
- **New Team Members** section
  - PeopleSoft Talent Acquisition Manager: My Job Openings Tile
  - PeopleSoft Talent Acquisition Manager: Recruiting Activities Tile
  - PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Activity Tile
  - OnBoarding Manager Insights Tile (see PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Insight Tile (for Managers)

Using the My Work - Human Resources Section as an Administrator

This topic describes the delivered tiles for the administrator My Work - Human Resources section.

The following videos provide an overview and demonstration of the PeopleSoft Landing Page dashboards:

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Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

Video: Image Highlights, PeopleSoft HCM Update Image 54: U.S. Federal Landing Page Enhancements

Pages Used for the My Work - Human Resources Section as an Administrator

Name	Definition Name	Usage
My Work - Human Resources Section	HC_HUMANRESOURCES_SCTN_LP	Access tiles to common transactions for business analysts and administrators across Human Resources, Compensation, Position Management, Profiles, Performance, Career and Succession Planning and Learning areas.
Manage People and Jobs Tile	HC_MANAGE_PEOPLE_JOBS_LINK (this is the cref for the tile)	Access the Manage People and Jobs dashboard for a consolidated view of all the necessary tasks for managing the workforce.
Manage People and Jobs Dashboard	HC_MNG_PPL_JOB_DBRD_LP	Access tiles to add and manage job and person information, access approvals and analytics, and complete compliance reporting.
(USF) Manage Personnel Actions Tile	HC_GVT_MNG_PRSNL_ACTN_LINK (this is the cref for the tile)	Access the ManagePersonnel Actions dashboard for a consolidated view of all the necessary tasks for managing the workforce as a federal administrator.
(USF) Manage Personnel Actions Dashboard	HC_GVT_MNG_PRSNL_ACT_DBRD_LP	Access tiles to add and manage job and person information, access approvals and analytics, and complete compliance reporting as a federal administrator.

My Work - Human Resources Section

Use the My Work - Human Resources section (HC_HUMANRESOURCES_SCTN_LP) to access tiles to common transactions for business analysts and administrators across Human Resources, Compensation, Position Management, Profiles, Performance, Career and Succession Planning and Learning areas.

Navigation:

The Human Resources section is part of the My Work section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Human Resources section.

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The **Human Resources** section includes the following tiles, which appear based on user roles and security permissions.

- Manage People and Jobs Tile
- PeopleSoft Human Resources Manage Positions: Position Management Tile
- PeopleSoft Human Resources Manage Profiles: Manage Profiles Tile
- PeopleSoft ePerformance: Performance Management Tile
- PeopleSoft eCompensation Manager Desktop: Compensation Administration Tile
- PeopleSoft Human Resources Monitor Health and Safety: Manage Health and Safety Tile
- PeopleSoft Human Resources Plan Careers and Successions: Career and Succession Planning Tile
- Learning Administration Tile (See *PeopleSoft HCM: Enterprise Learning Management* documentation)

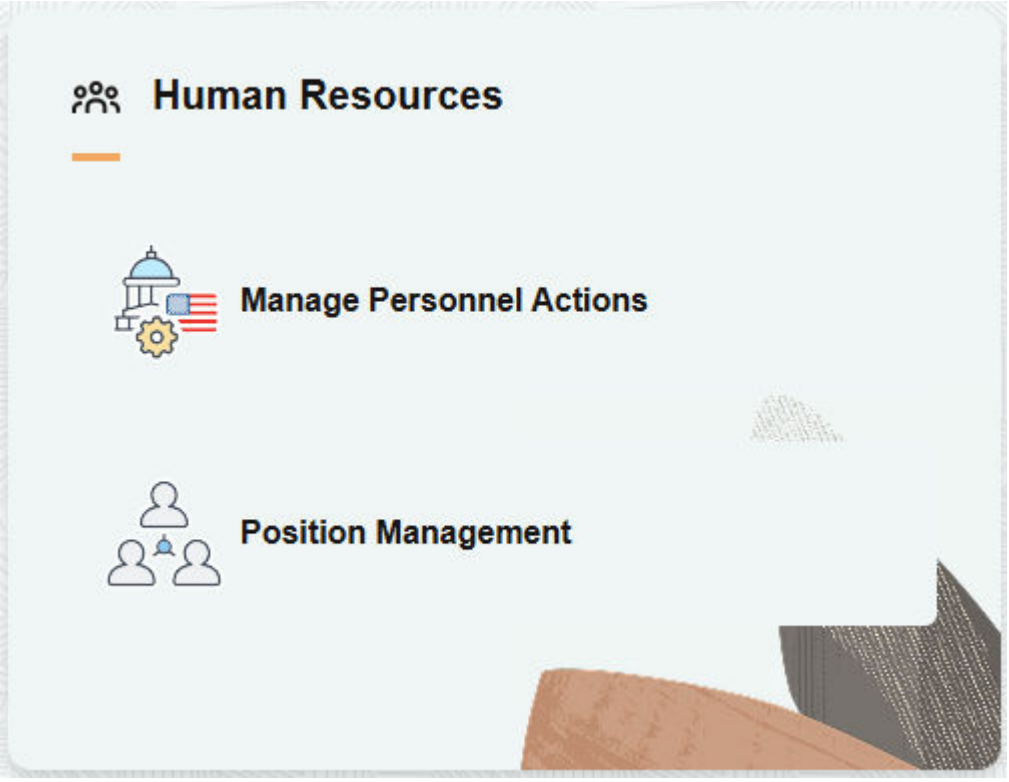
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When you select a tile, it takes you to the corresponding transaction page with the exception of the Manage People and Jobs Tile, which takes you to a dashboard of multiple tiles to perform various person and job-related tasks.

(USF) Manage Personnel Actions tile for U.S. Federal Administrators

When a U.S. federal administrator accesses the landing page, the Human Resources section of the My Work section displays the (USF) Manage Personnel Actions Tile as well as the other commercial tiles.

(USF) This example illustrates the Human Resources section for a federal user



Select the tile to access the (USF) Manage Personnel Actions Dashboard.

Manage People and Jobs Tile

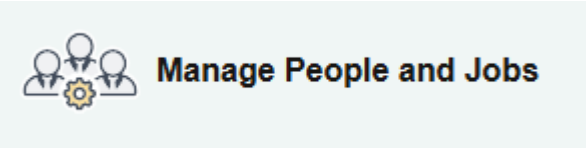
Use the Manage People and Jobs tile (HC_MANAGE_PEOPLE_JOBS_LINK) to access the Manage People and Jobs dashboard for a consolidated view of all the necessary tasks for managing the workforce.

Navigation:

The Manage People and Jobs tile is part of the My Work - Human Resources section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Manage People and Jobs tile.

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Select this tile to access the Manage People and Jobs Dashboard.

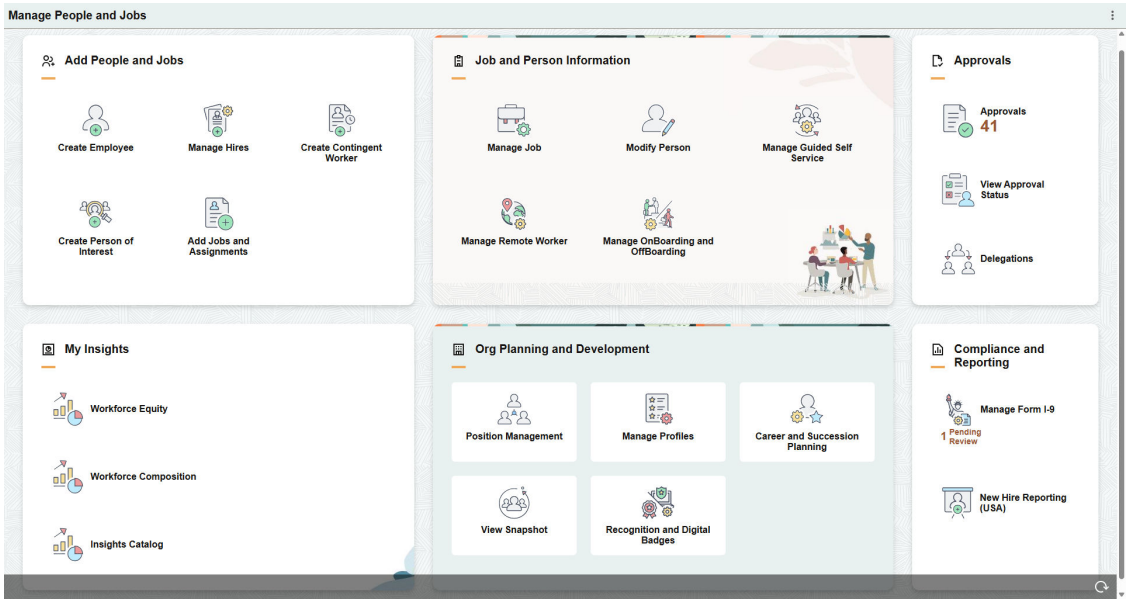
Manage People and Jobs Dashboard

Use the Manage People and Jobs dashboard (HC_MNG_PPL_JOB_DBRD_LP) to access tiles to add and manage job and person information, support organizational planning and development, access approvals and analytics, and complete compliance reporting.

Navigation:

Select the Manage People and Jobs tile from the My Work - Human Resources section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Manage People and Jobs dashboard.



The **Manage People and Jobs** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Add People and Jobs** section
  - PeopleSoft Human Resources Administer Workforce: Create Employee Tile
  - Manage Hires Tile (see PeopleSoft Human Resources Administer Workforce: Manage Hires Page)
  - PeopleSoft Human Resources Administer Workforce: Create Contingent Worker Tile
  - PeopleSoft Human Resources Administer Workforce: Create Person of Interest Tile
  - Add Jobs and Assignments Tile (see PeopleSoft Human Resources Administer Workforce: (Fluid) Organizational Relationship Tile)

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- **Job and Person Information** section
  - PeopleSoft Human Resources Administer Workforce: Manage Job Tile
  - PeopleSoft Human Resources Administer Workforce: Modify Person Tile
  - Manage Guided Self Service Tile (see PeopleSoft eProfile Manager Desktop: <Transaction Name> Page for Reviewing Submitted Transactions)
  - PeopleSoft Human Resources Administer Workforce: Manage Remote Worker Tile (for Administrators)
  - Manage OnBoarding and OffBoarding Tile (see PeopleSoft Human Resources Administer Workforce: Setting Up PreBoarding and OnBoarding Activity Guides)
- **Approvals** section
  - Approvals Tile (Fluid Approvals)
  - View Approval Status Tile
  - Enterprise Components: Delegations Tile
- **My Insights** section
  - PeopleSoft Human Resources Administer Workforce: Workforce Equity Tile
  - PeopleSoft Human Resources Administer Workforce: Workforce Composition Tile
  - Insights Catalog Tile
- **Org Planning and Development** section
  - PeopleSoft Human Resources Manage Positions: Position Management Tile
  - PeopleSoft Human Resources Manage Profiles: Manage Profiles Tile
  - PeopleSoft Human Resources Plan Careers and Successions: Career and Succession Planning Tile
  - PeopleSoft eProfile Manager Desktop: (Administrator) View Snapshot Tile
  - Recognition and Digital Badges Tile
- **Compliance and Reporting** section
  - PeopleSoft Human Resources Administer Workforce: Manage Form I-9 Tile
  - New Hire Reporting (USA) Tile (see PeopleSoft Human Resources Meet Regulatory Requirements: New Hire Report Generation Page)

(USF) Manage Personnel Actions Tile

Use the Manage Personnel Actions tile to access the ManagePersonnel Actions dashboard for a consolidated view of all the necessary tasks for managing the workforce as a federal administrator.

> **Note**
>
> A user must be identified as a federal administrator with the *HCLPUSFMNGPERACTN - Manage Personnel Actions Tile* permission list to see and access this tile.

Navigation:

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The Manage Personnel Actions tile is part of the My Work - Human Resources section of the PeopleSoft (My Home) Landing Page for a federal user.

This example illustrates the Manage Personnel Actions tile.



Select this tile to access the (USF) Manage Personnel Actions Dashboard.

(USF) Manage Personnel Actions Dashboard

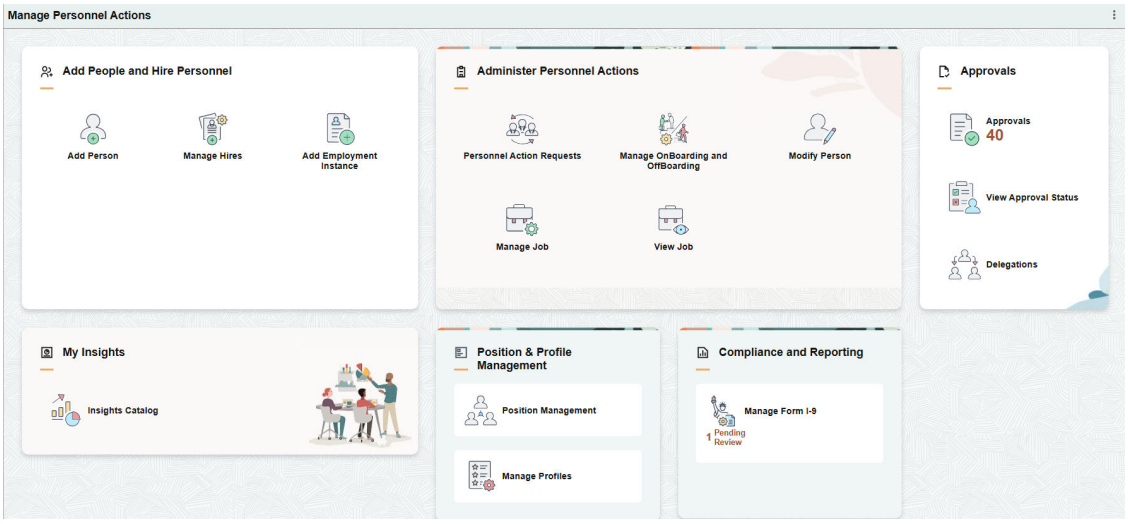
Use the Manage Personnel Actions dashboard to access tiles to add and manage job and person information, access approvals and analytics, and complete compliance reporting as a federal administrator.

> **Note**
>
> A user must be identified as a federal administrator to see and access this dashboard.

Navigation:

Select the Manage Personnel Actions tile from the My Work - Human Resources section of the PeopleSoft (My Home) Landing Page as a federal administrator.

This example illustrates the fields and controls on the Manage Personnel Actions dashboard.



The **Manage Personnel Actions** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

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These tiles take you to the Classic federal pages.

- **Add People and Hire Personnel** section

  The add person tile takes you to the Fluid page while the manage hires and employment instance tiles take you to the Classic pages that update the PAR record.

  - PeopleSoft Human Resources Administer Workforce: Add Person Tile
  - Manage Hires Tile (see PeopleSoft Human Resources Administer Workforce: Manage Hires Page)
  - Add Employment Instance Tile (see PeopleSoft Human Resources Administer Workforce: Add Employment Instance USF Page)

- **Administer Personnel Actions** section

  These tiles take you to the Fluid pages.

  - PeopleSoft Human Resources Administer Workforce: Personnel Action Request Tile)
  - Manage OnBoarding and OffBoarding Tile (see PeopleSoft Human Resources Administer Workforce: Setting Up PreBoarding and OnBoarding Activity Guides)
  - PeopleSoft Human Resources Administer Workforce: Modify Person Tile
  - PeopleSoft Human Resources Administer Workforce: Manage Job Tile
  - View Job Tile - this is the display only view of the Manage Job pages (see PeopleSoft Human Resources Administer Workforce: Manage Job Tile)

- **Approvals** section

  These tiles take you to the Fluid pages.

  - Approvals Tile (Fluid Approvals)
  - View Approval Status Tile
  - Enterprise Components: Delegations Tile

- **My Insights** section

  This tile takes you to the Fluid page.

  Insights Catalog Tile

- **Position & Profile Management** section

  This tile takes you to the Fluid page.

  - PeopleSoft Human Resources Manage Positions: Position Management Tile
  - PeopleSoft Human Resources Manage Profiles: Manage Profiles Tile

- **Compliance and Reporting** section

  This tile takes you to the Fluid page.

  PeopleSoft Human Resources Administer Workforce: Manage Form I-9 Tile

Using the My Work - Time and Attendance Section as an Administrator

This topic describes the delivered tiles for the administrator My Work - Time and Attendance section.

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The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

Pages Used for the My Work - Time and Attendance Section as an Administrator

Name	Definition Name	Usage
My Work - Time and Attendance Section	HC_TIME_ATTENDANCE_SCTN_LP	Access common navigation items for business analysts, administrators, and timekeepers across Time and Labor and Absence Management.
Administer Time and Attendance Tile	HC_TL_TIMEABS_DBRD_TILE_FL_GBL (this is the cref for the tile)	Access the Administer Time and Attendance dashboard for additional tiles to perform various time and attendance-related tasks.
Administer Time and Attendance Dashboard	HC_TL_ADM_TIME_ABS_DBRD_LP	Access tiles to manage time, absence, schedules, reporting, configurations, and insight analytics.

My Work - Time and Attendance Section

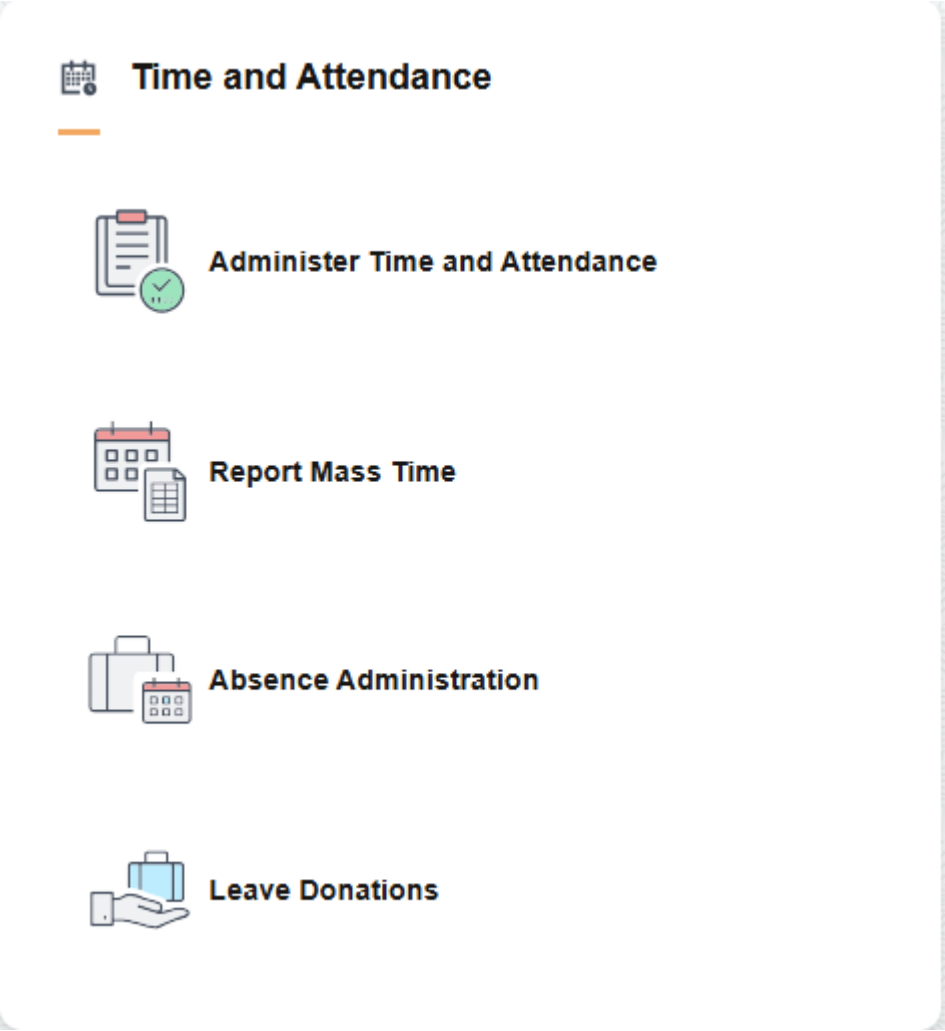
Use the My Work - Time and Attendance (HC_TIME_ATTENDANCE_SCTN_LP) section to access common navigation items for business analysts, administrators, and timekeepers across Time and Labor and Absence Management.

Navigation:

The Time and Attendance section is part of the My Work section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Time and Attendance section.

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The **Time and Attendance** section includes the following tiles, which appear based on user roles and security permissions.

- Administer Time and Attendance Tile
- Report Mass Time Tile (see PeopleSoft Time and Labor: Mass Time - Select Time Reporters Page)
- PeopleSoft Absence Management: Absence Administration Tile
- PeopleSoft Absence Management: Leave Donations Tile

When you select a tile, it takes you to the corresponding transaction page with the exception of the Administer Time and Attendance Tile, which takes you to a dashboard of multiple tiles to perform various time and attendance-related tasks.

Administer Time and Attendance Tile

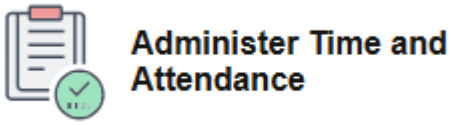
Use the Administer Time and Attendance tile (HC_TL_TIMEABS_DBRD_TILE_FL_GBL) to access the Administer Time and Attendance dashboard for additional tiles to perform various time and attendance-related tasks.

Navigation:

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The Administer Time and Attendance tile is part of the My Work - Time and Attendance section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Administer Time and Attendance tile.



Select this tile to access the Administer Time and Attendance Dashboard.

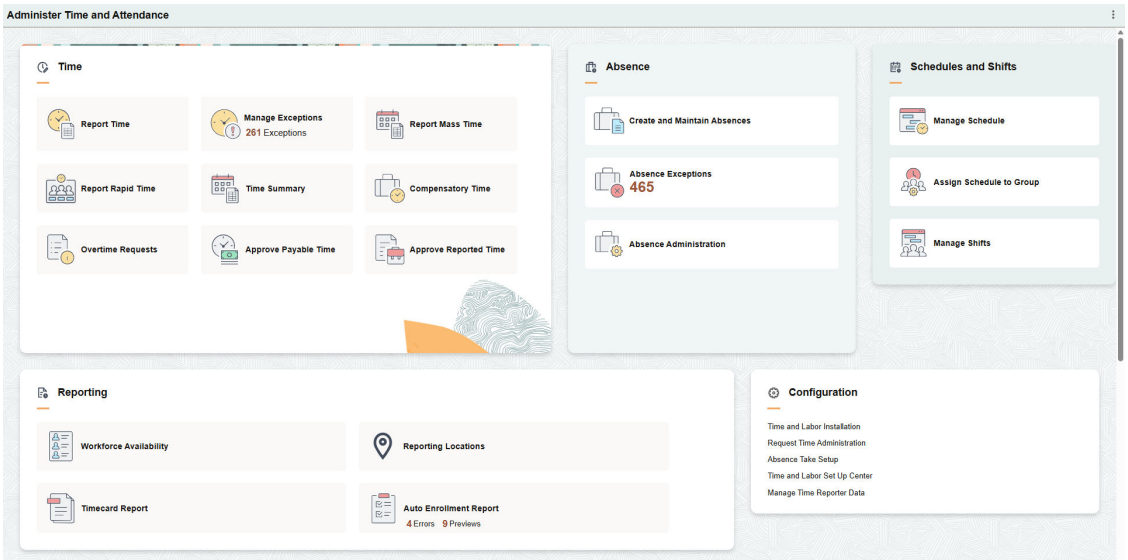
Administer Time and Attendance Dashboard

Use the Administer Time and Attendance dashboard (HC_TL_ADM_TIME_ABS_DBRD_LP) to access tiles to manage time, absence, schedules, reporting, configurations, and insight analytics.

Navigation:

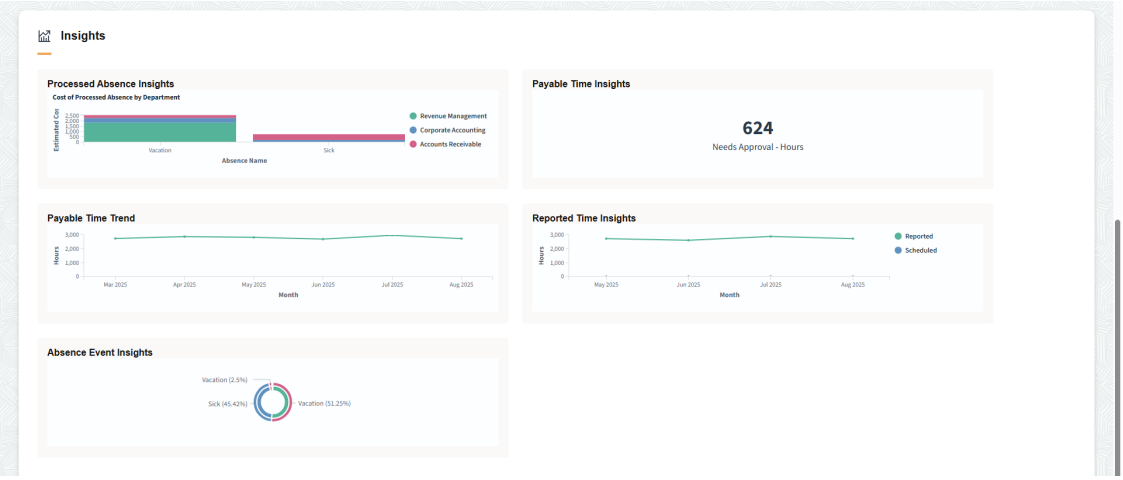
Select the Administer Time and Attendance tile from the My Work - Time and Attendance section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Administer Time and Attendance dashboard (1 of 2).



This example illustrates the fields and controls on the Administer Time and Attendance dashboard (2 of 2).

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The **Administer Time and Attendance** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Time** section
  - Report Time Tile (see PeopleSoft Time and Labor: Select Employee Page and PeopleSoft Time and Labor: Report Time Select Employee Filters page)
  - Manage Exceptions Tile (see PeopleSoft Time and Labor: Manage Exceptions Page)
  - Report Mass Time tile (see PeopleSoft Time and Labor: Mass Time - Select Time Reporters Page)
  - Report Rapid Time Tile (see PeopleSoft Time and Labor: Rapid Time Page)
  - Time Summary Tile (see PeopleSoft Time and Labor: Time Summary Page)
  - Compensatory Time Tile (see PeopleSoft Time and Labor: Compensatory Time Page)
  - Overtime Requests Tile (see PeopleSoft Time and Labor: Approve Overtime Requests - Select an Employee Request Page)
  - Approve Payable Time Tile (see PeopleSoft Time and Labor: Approve Payable Time - Approve Time for Time Reporters Page)
  - Approve Reported Time Tile (see PeopleSoft Time and Labor: Approve Reported Time - Timesheet Summary Page)
- **Absence** section
  - Create and Maintain Absences Tile (see PeopleSoft Absence Management: Create and Maintain Absence Requests Page)
  - Absence Exceptions Tile (see PeopleSoft Absence Management: Absence Exceptions Page)
  - PeopleSoft Absence Management: Absence Administration Tile
- **Schedule and Shifts** section
  - PeopleSoft Time and Labor: Manage Schedule Tile
  - Assign Schedule to Group Tile (see PeopleSoft Time and Labor: Assign Schedule to a Group Page)
  - Manage Shifts Tile (see PeopleSoft Absence Management: Shift Page)
- **Reporting** section

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  - Workforce Availability Tile (see PeopleSoft Time and Labor: Workforce Availability Page)
  - Reporting Locations Tile (see PeopleSoft Time and Labor: Reporting Locations Page)
  - Timecard Report Tile (see PeopleSoft Time and Labor: TimeCard Page)
  - Auto Enrollment Report Tile (see PeopleSoft Time and Labor: Understanding the Time and Labor Auto Enrollment Analytics)
- **Configuration** section
  - Time and Labor Installation link (see PeopleSoft Time and Labor: Time and Labor Installation Page)
  - Request Time Administration link (see PeopleSoft Time and Labor: Request Time Administration Page)
  - Absence Take Setup link (see PeopleSoft Absence Management: Configure Country Take Setup - Absences Page)
  - Time and Labor Set Up Center link (see PeopleSoft Time and Labor: Pages Used to Navigate in Time and Labor)
  - Manage Time Reporter Data link (see PeopleSoft Time and Labor: Manage Time Reporter Data Tile)
- **Insights** section
  - PeopleSoft Absence Management: Processed Absence Insights Tile
  - PeopleSoft Time and Labor: Payable Time Insights Tile
  - PeopleSoft Time and Labor: Payable Time Trend Tile
  - PeopleSoft Time and Labor: Reported Time Insights Tile
  - PeopleSoft Absence Management: Absence Event Insights Tile

Using the My Work - Recruiting Dashboard as a Recruiter or Administrator

This topic describes the delivered sections and tiles for the recruiter or administrator My Work - Team section and dashboard.

The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

Pages Used for the My Work - Recruiting Dashboard for Recruiters or Administrators

Name	Definition Name	Usage
My Work - Recruiting Section	HC_HRS_RECRUITING_SCTN_LP	Access common navigation items to support the everyday work of the recruiter, recruiting manager, and recruitment administrator.

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Name	Definition Name	Usage
Recruiting Dashboard	HC_HRS_RECRUITING_HP_LNK1_FL	Access a consolidated view for the recruiting needs to manage recruiting tasks, job openings, applicants, insights, and in-progress recruiting tasks.

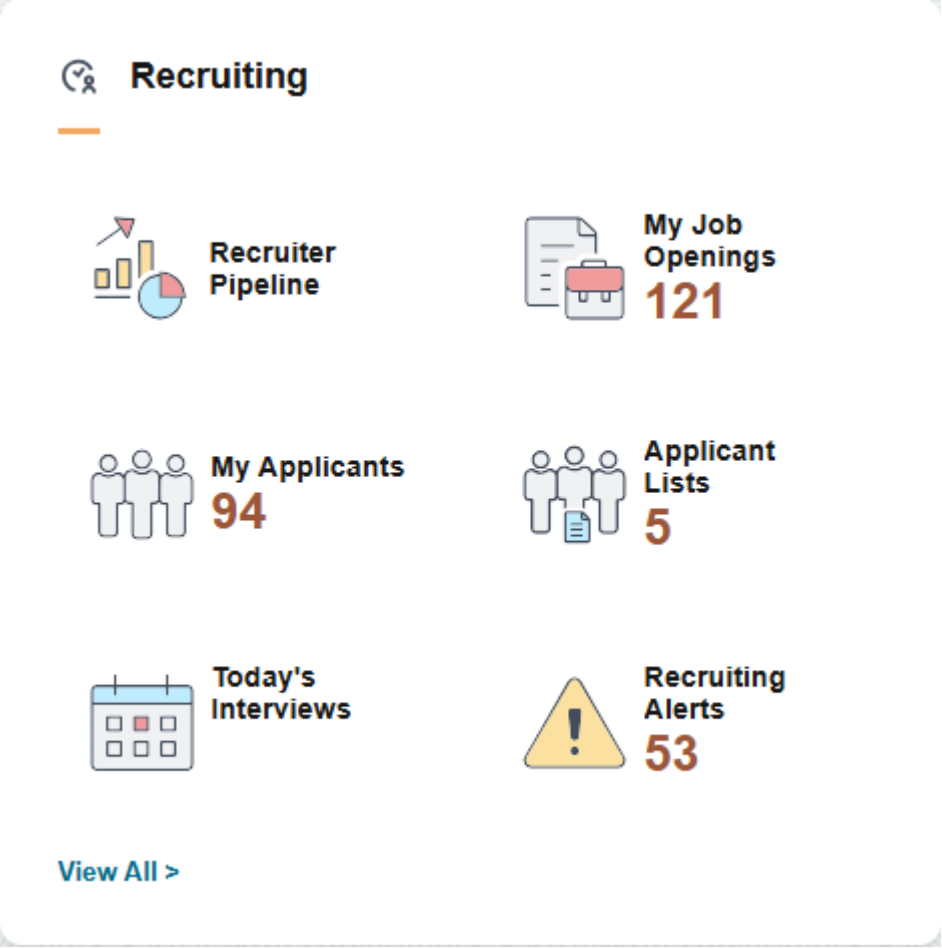
My Work - Recruiting Section

Use the My Work - Recruiting section (HC_HRS_RECRUITING_SCTN_LP) to access common navigation items to support the everyday work of the recruiter, recruiting manager, and recruitment administrator.

Navigation:

The Recruiting section is part of the My Work section of the PeopleSoft (My Home) Landing Page.

This example illustrates the Recruiting section.



The section displays common tiles recruiters and administrators may access to track and maintain recruiting information.

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Field or Control	Description
View All	Select the **View All** link to access the Recruiting Dashboard and view all tiles to manage recruiting data.

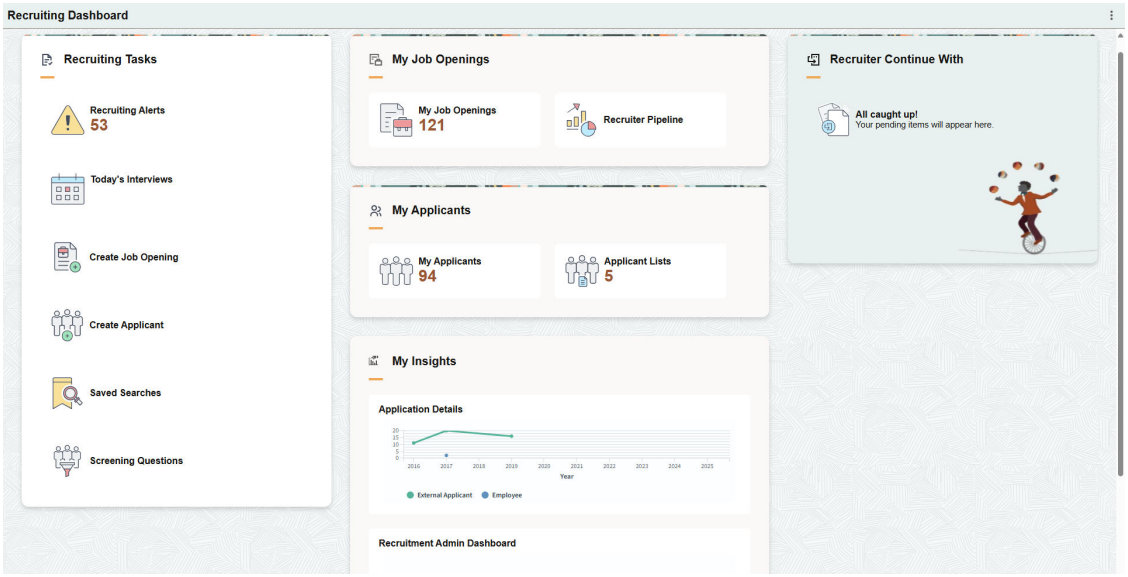
Recruiting Dashboard

Use the Recruiting dashboard (HC_HRS_RECRUITING_HP_LNK1_FL) to access a consolidated view for the recruiting needs to manage recruiting tasks, job openings, applicants, insights, and in-progress recruiting tasks.

Navigation:

Select the **View All** link from the My Work - Recruiting section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Recruiting dashboard.



The **Recruiting** dashboard includes the following sections and tiles, which appear based on user roles and security permissions.

- **Recruiting Tasks** section
  - PeopleSoft Talent Acquisition Manager: Recruiting Alerts Tile
  - PeopleSoft Talent Acquisition Manager: Today's Interviews Tile
  - Create Job Opening Tile (see PeopleSoft Talent Acquisition Manager: Creating Job Openings)
  - Create Applicant Tile (see PeopleSoft Talent Acquisition Manager: Create Applicant Page)
  - Saved Searches Tile (see PeopleSoft Talent Acquisition Manager: Saved Searches Page)

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  - Screening Questions Tile (see PeopleSoft Talent Acquisition Manager: Recruiting Question Definition Page)
- **My Job Openings** section
  - PeopleSoft Talent Acquisition Manager: My Job Openings Tile
  - PeopleSoft Talent Acquisition Manager: Recruiter Pipeline Tile
- **My Applicants** section
  - PeopleSoft Talent Acquisition Manager: My Applicants Tile
  - PeopleSoft Talent Acquisition Manager: Applicant Lists Tile
- **My Insights** section
  - PeopleSoft Talent Acquisition Manager: Application Details Tile
  - PeopleSoft Talent Acquisition Manager: Recruitment Admin Dashboard Tile

  Select the **View All** link to access the PeopleSoft Talent Acquisition Manager: Recruiting Insight Home Page and access the Recruiting Insights homepage for recruiting analytics.
- **Recruiter Continue With** section

  For of list of supported tiles that may appear in this section, see Recruiter Continue With Section.

Recruiter Continue With Section

Use the Recruiter Continue With section to identify and access recruiting transactions that you have not completed, such as those that have been saved for later or are in draft status.

This section works similar to the PeopleSoft Landing Page - Continue With Section. If a user does not have the necessary permission, then the tiles are available in the Continue With Section on the My Home page. Else, the tiles are available in the Recruiter Continue With Section.

> **Note**
>
> The Continue With section is available on the Recruiting Dashboard to users (Recruiter or Recruitment Administrator) with *Recruiter Fluid*, *Recruiting Manager Fluid* or *Recruitment Admin Fluid* role. Users with any other role should add the *HCLPRECCOM* permission list to their roles to access the Continue With section from the Recruiting Dashboard.

The following table lists the delivered tiles that may appear in the Continue With section of the Recruiting Dashboard and provides links to access documentation for each.

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Continue With Tile	Notification	Additional Information
Job Opening tile (see PeopleSoft Talent Acquisition Manager: Open Jobs Page)	*DraftedJobOpening* (Recruiting Dashboard Notification for Drafted Job Opening)	The tile appears on the **Continue With** section of the Recruiter's Recruiting Dashboard when a Recruiter or Recruitment Administrator or a user having access to the Recruiting Dashboard creates a job opening and saves it as draft. Selecting this tile takes the user to the drafted job opening from where they can continue with their transaction. This tile is dismissed when the user *Saves and Open* or *Deletes* the drafted job opening. The user can also dismiss this notification by selecting *View All* or *Edit* button of the **Continue With** section and selecting *Dismiss* button in the **View All** page.
Job Offer tile (see PeopleSoft Talent Acquisition Manager: Creating Job Offers)	*DraftedOffer* (Recruiting Dashboard Notification for Drafted Offer)	The tile appears on the **Continue With** section of the Recruiter's Recruiting Dashboard when a Recruiter or Recruitment Administrator or a user having access to the Recruiting Dashboard saves a job offer as a draft. Selecting this tile takes the user to the drafted job offer from where they can continue with their transaction. This tile is dismissed when the user submits the drafted job offer. The user can also dismiss this notification by selecting *View All* or *Edit* button of the **Continue With** section and selecting *Dismiss* button in the **View All** page.

Using the My Work - Reporting & Process Tools Section

This topic describes the delivered tiles for the Reporting & Process Tools section.

The following video provides an overview and demonstration of the PeopleSoft Landing Page dashboards:

Video: Image Highlight, PeoleSoft HCM Update Image 53: PeopleSoft HCM Example Dashboards for the Landing Page

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Pages Used for the My Work - Reporting & Process Tools Section

Name	Definition Name	Usage
My Work - Reporting & Process Tools Section	EOHP_REPORTTOOLS_SCTN_LP	View processes, perform queries, and generate reports.

My Work - Reporting & Process Tools Section

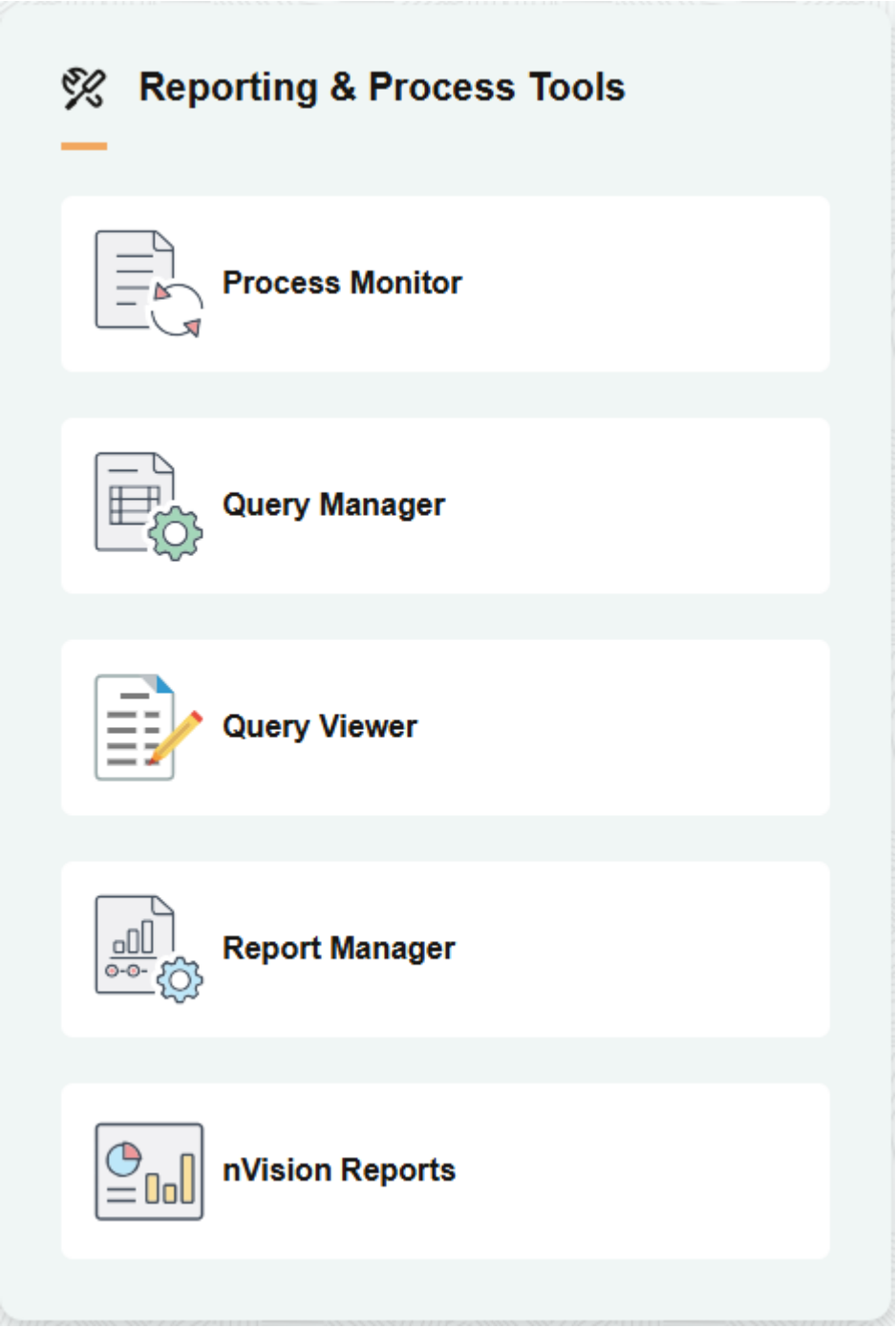
Use the Reporting & Process Tools section to view processes, perform queries, and generate reports.

Navigation:

The Reporting & Process Tools section is part of the My Work section of the PeopleSoft (My Home) Landing Page.

This example illustrates the fields and controls on the Reporting & Process Tools section.

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The **Reporting & Process Tools** section includes the following PeopleTools tiles, which appear based on user roles and security permissions.

- Process Monitor Tile (cref: EO_PROCESS_MONITOR_GBL)
- Query Manager Tile (cref: EO_QUERY_MANAGER_GBL)
- Query Viewer Tile (cref: EO_QUERY_VIEWER_GBL)
- Report Manager Tile (cref: EO_CONTENT_LIST_GBL)
- nVision Reports Tile (cref: EO_NVS_REPORT_REQUEST_GBL)

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Understanding Drop Zones

Understanding Drop Zones

Drop Zones allows you to add custom content such as editable or display only fields, links, buttons, or text. PeopleSoft has added Drop Zones to the top, middle, and bottom of some Fluid pages. You can create records, sub-pages, and other new objects you want to display using Drop Zones.

For more information on Drop Zones, see the product documentation for *PeopleTools: Fluid User Interface Developer's Guide,* "Creating Pages for Fluid Applications," Creating and Configuring Drop Zones.

> **Note**
>
> For future uptake of drop zones, use the *PeopleTools Features* tracking group. Enter the tracking group *Drop Zone Support for PT8.57* or above.

These videos provide an overview of Drop Zones:

Video: PeopleSoft Drop Zone on Fluid and Classic Plus Pages

Video: Image Highlights, PeopleSoft HCM Update Image 30: Drop Zones for HCM

Video: Image Highlights, PeopleSoft HCM Update Image 31: Drop Zones for HCM

Video: Image Highlights, PeopleSoft HCM Update Image 34: Drop Zones on Classic Foundation Pages in HR

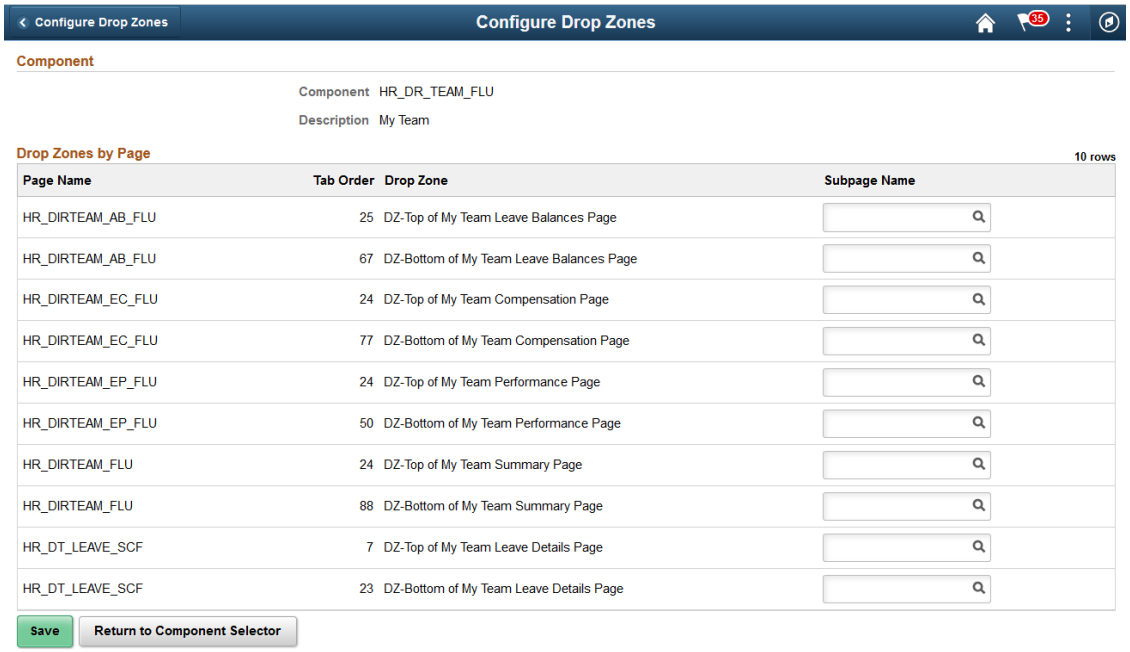
Find Drop Zone-Enabled Pages

To find which fluid pages have been enabled for drop zones:

1. Navigate to: **PeopleTools**, and then **Portal**, and then **Configure Drop Zones**
2. Enter the Component (listed in column 2 of the "Components Where Drop Zones are Enabled" topic that follows) into the **Component** field.
3. Click Search.

Lists drop zone-enabled pages by component.

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The **Page Name** column provides the Page ID for all pages, within the component, where drop zones are available.

The **Drop Zone** column displays the message catalog text associated to the group box and indicates where the drop zone resides on the page.

Components Where Drop Zones are Enabled

This table lists the components where drop zones are enabled:

Product	Component	Component Description	Image Drop Zone Enabled
Common (HCM ChartFields)	HMCF_CHARTFLD_FLU	ChartField Common Component	Image 35
Absence Management	HGA_EA_REQ_DTL_FLU	Manage Extended Absence	Image 31
Absence Management	HGA_EA_REQ_FLU	Request Extended Absence	Image 31
Absence Management	HGA_EA_REQ_LND_FL	Extended Absence	Image 31
Absence Management	HGA_EA_REQ_SUB_FL	Extended Absence	Image 31
Absence Management	HGA_EVENT_ANLY_FL	Absence Event Analysis	Image 30
Absence Management	HGA_FA_ADD_INFO_FL	FA Additional Info	Image 30
Absence Management	HGA_HOL_CAL_FLU	Holiday Calendar	Image 45
Absence Management	HGA_LVDN_LAUNCH_FL	Manage Leave Donation	Image 48
Absence Management	HGA_LVDN_REQDON_FL	Leave Donation Request	Image 48
Absence Management	HGA_LVDN_REQRCV_FL	Leave Donation Receive Request	Image 48

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Product	Component	Component Description	Image Drop Zone Enabled
Absence Management	HGA_LVDN_SSEND_FL	Fluid End Leave Donation	Image 48
Absence Management	HGA_LVDN_SSRET_FL	Fluid Return Unused Leave	Image 48
Absence Management	HGA_SS_DYNTILE_FLU	Absence Dynamic Tile Content	Image 55
Absence Management	HGA_SS_LD_HIST_FL	Leave Donation History	Image 48
Absence Management	HGA_PAYEE_MSG_FLU	Absence Exception	Image 30
Absence Management	HGA_SS_BAL_FLU	Balances	Image 30
Absence Management	HGA_SS_REQ_FLU	Request Absence	Image 30
Absence Management	HGA_SS_REQCAN_FLU	Cancel Absence	Image 30
Absence Management	HGA_SS_REQHIST_FLU	View Requests	Image 30
Absence Management	HGA_SS_REQSTA_FLU	Details	Image 30
Benefits Administration	BAS_CMP_PLNDATA_FL	Comparison Plan Data	Image 43
Benefits Administration	BAS_CMP_PLNSRCH_FL	Comparison Plan Data	Image 43
Benefits Administration	BAS_CMP_TMPSRCH_FL	Comparison Template	Image 43
Benefits Administration	BAS_STATMNTS_FL	Benefit Statements	Image 30
Benefits Administration	BAS_STMT_ADM_FL	Review Employee Statements	Image 30
Benefits Administration	BNE_CARD_SUMM_FL	Benefits Enrollment	Image 30
Benefits Administration	BNE_CERTIFICATE_FL	Benefits Certificate	Image 30
Benefits Administration	BNE_LE_ENROLL1_FL	Enrollment Elections	Image 30
Benefits Administration	BNE_OBD_ENROLL_FL	Enrollment Elections	Image 52
Benefits Administration	BNE_PLAN_1X_FL	Health Benefits	Image 30
Benefits Administration	BNE_PLAN_2X_FL	Life and Accidental Death	Image 30
Benefits Administration	BNE_PLAN_3X_FL	Disability Benefits	Image 30
Benefits Administration	BNE_PLAN_4X_FL	Savings Plans	Image 30
Benefits Administration	BNE_PLAN_5X_FL	Leave Plans	Image 30
Benefits Administration	BNE_PLAN_6X_FL	Spending Accounts	Image 30
Benefits Administration	BNE_PLAN_7X_FL	Retirement Plans	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
Benefits Administration	BNE_PLAN_8X_FL	Pension Plans	Image 30
Benefits Administration	BNE_PLAN_9X_FL	Vacation Benefits	Image 30
Benefits Administration	BNE_PLAN_AX_FL	Simple Benefits	Image 30
Benefits Administration	BNE_PLN_COMPARE_FL	Benefits Plan Comparison	Image 43
Benefits Administration	BNE_SEL_EVENT_FL	Benefits Enrollment	Image 30
eCompensation	HR_EC_HIST_ESS_FL	Compensation History	Image 30
eCompensation	HR_EC_CONFIG_FL	Define Compensation History	Image 30
eCompensation	HR_EC_HIST_MSS_FL	View Compensation History	Image 30
eCompensation	TRW_ADM_STMT_FL	Administer Total Rewards	Image 30
eCompensation	TRW_SS_STMT_FL	Total Rewards	Image 30
ePerformance Management	EP_ADVANCE_DOC_FL	Advance Document	Image 54
ePerformance Management	EP_REV_ADV_DOC_FL	Review Document Reports	Image 54
ePerformance Management	EP_APPR_CANCEL_FL	Cancel Documents	Image 30
ePerformance Management	EP_APPR_COPY_FL	Copy to Other Documents	Image 45
ePerformance Management	EP_APPR_DELETE_FL	Delete Documents	Image 30
ePerformance Management	EP_APPR_NOM_FL	Participants	Image 45
ePerformance Management	EP_APPR_PRELIM_FL	Enter Preliminary Ratings	Image 30
ePerformance Management	EP_APPR_STATUS_FL	Reopen Documents	Image 30
ePerformance Management	EP_APPR_SUB_FB_FL	Participant Ratings	Image 45
ePerformance Management	EP_APPR_XFER_FL	Transfer Documents	Image 30
ePerformance Management	EP_CREATE_BYGRP_FL	MSS Create Performance Docs	Image 30
ePerformance Management	EP_CREATE_MSS_FLU	Team Performance	Image 30
ePerformance Management	EP_DOC_SELECT_FL	Team Documents	Image 45
ePerformance Management	EP_DOCSTS_FLU	Team Performance Status	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
ePerformance Management	EP_EE_SELECT_FLU	Performance	Image 30
ePerformance Management	EP_EEDOC_SELECT_FL	Performance	Image 45
ePerformance Management	EP_EMAIL_NOTIFY_FL	Email Notification	Image 45
ePerformance Management	EP_MAIN_DOC_B_FL	Performance Review	Image 45
ePerformance Management	EP_MAIN_DOC_FL	Performance Review	Image 45
ePerformance Management	EP_MSS_SELECT_FLU	Team Performance	Image 30
ePerformance Management	EP_NOTE_SRCH_FL	Performance Notes	Image 52
ePerformance Management	EP_NP_CONFIG_FL	Configure Performance Notes	Image 52
ePerformance Management	EP_RTGMDL_POPUP_FL	Rating Model Descriptions	Image 45
ePerformance Management	EP_VIEW_MY_FL	View Only Documents	Image 30
ePerformance Management	EP_XFER_LOG_FL	Auto Transfer log	Image 30
ePerformance Management	EPO_CASC_PARAM_FL	Cascade Items	Image 49
ePerformance Management	EPO_CASC_RUN_FL	Review Manager Cascaded Items	Image 49
ePerformance Management	EPO_CREATE_PAGE_FL	Create Document	Image 47
ePerformance Management	EPO_DOC_DETAILS_FL	Document Details	Image 47
ePerformance Management	EPO_MAIN_FL	Business Objectives	Image 47
ePerformance Management	EPO_ORG_CHART_FL	View Published Objectives	Image 47
ePerformance Management	EPO_PAGE_SELECT_FL	Business Objectives	Image 47
ePerformance Management	EPO_UPDT_MY_OBJ_FL	Update Objective Page FL	Image 47
ePerformance Management	EPO_VIEW_MY_OBJ_FL	View Objective launcher FL	Image 47
ePerformance Management	EPO_VIEW_PAGE_FL	Business Objectives Document	Image 47
Federal	AGENCY_TABLE	Agency Data and Settings	Image 34
Federal	EE_1ST_AUTH	Ist Authorization	Image 52
Federal	EE_2ND_AUTH	2nd Authorization	Image 52

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Product	Component	Component Description	Image Drop Zone Enabled
Federal	EE_APPROVAL	Approval of Personnel Act Req	Image 52
Federal	EE_CANCELLATION	Cancellation of Personnel Act	Image 52
Federal	EE_CONC_HIRE	Concurrent Employee Hire	Image 52
Federal	EE_CORRECTION	Correction to Personnel Action	Image 52
Federal	EE_EMPL_REQ	Employee Request for Personnel	Image 52
Federal	EE_HIRE	Hire Employee	Image 52
Federal	EE_HR_HSTRY_FL	View Job Information	Image 30
Federal	EE_HR_PROC	Human Resources Processing	Image 52
Federal	EE_HR_PROC_FL	Create/View Personnel Actions	Image 30
Federal	EE_HR_SUB_CNF_FL	PAR Submit Confirmation	Image 30
Federal	EE_IRR_CORR	Correction to IRR	Image 52
Federal	EE_IRR_SUPP	Supplemental to IRR	Image 52
Federal	EE_REQUEST_FL	Personnel Actions USF	Image 30
Federal	EE_SUP_REQ	Supervisor Request	Image 52
Federal	FG_EE_LEAVE_REQ	Federal Request for Leave	Image 52
Federal	FG_EE_TERMINATION	Federal Termination Request	Image 52
Federal	GVT_CI_EXEP_CMP_FL	CI Exceptions for Guided PAR	Image 30
Federal	GVT_PAR_ERR_CMP_FL	View Edit Errors	Image 30
Federal	SALARY_GRADE_TABLE	Salary Grade Table	Image 34
Global Payroll	BANK_EC	Add Bank Information (Banks)	Image 51
Global Payroll	GP_AUD_MAIN_FL	Element trace Viewer	Image 48
Global Payroll	GP_AUD_SRCH_FL	Element Trace Viewer	Image 48
Global Payroll	GP_ED_ELEM	Payee Assignment By Element	Image 51
Global Payroll	GP_ED_PYE	Element Assignment By Payee	Image 51
Global Payroll	GP_FRML_MAIN_FL	Formula Designer-Main	Image 51
Global Payroll	GP_FRML_SRCH_FL	Formula Designer	Image 51
Global Payroll	GP_NET_DIST	Specify Net Pay Elections	Image 51

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Product	Component	Component Description	Image Drop Zone Enabled
Global Payroll	GP_PI_MNL_ERNDED	One Time (Positive Input)	Image 51
Global Payroll	GP_RCP_PYE	Add Deduction Recipients	Image 51
Global Payroll	GP_PA_LAND855_FL	Global Payroll Analytics	Image 30
Global Payroll	GP_PA_LANDING_FL	Payroll Analytics	Image 30
Global Payroll	GP_SS_EE_PSLP_FLU	GP Self Service Payslip	Image 30
Global Payroll	GP_USER_PREF_FL	GP User Preferences	Image 30
Global Payroll	GPSC_BANK_ACC_FL	Maintain Fluid Bank Accounts.	Image 30
Global Payroll	GPSC_ELM_BRW_FL	Element Browser	Image 30
Global Payroll	GPSC_ELM_SRCH_FL	Element Browser	Image 30
Global Payroll	GPSC_NET_DIST_FL	Maintain Fluid Pay Distribs.	Image 30
Global Payroll	GPSC_SSB_BNKACC_FL	Bank Accounts Summary Fluid.	Image 30
Global Payroll	PYE_BANKACCT	Maintain Bank Accounts	Image 51
Global Payroll (Germany)	GPDE_AL_DEPT	Department	Image 34
Global Payroll (Germany)	GPDE_BK_PKE_ACCT1	Foreign Bank Transfer Info	Image 51
Global Payroll (Germany)	GPDE_BK_PKE_ACCT2	Payee Home Bank Default	Image 51
Human Resources	BDG_ADM_GIVE_FL	Give a Badge	Image 55
Human Resources	BDG_ADM_VWLST_FL	View and Award Badges	Image 55
Human Resources	BDG_SS_VIEW_LST_FL	View Digital Badges	Image 55
Human Resources	BDG_SS_VIEW_ONE_FL	Badge Details	Image 55
Human Resources	CAN_SLF_ID_DATA_FL	Canada Self IdentificationData	Image 47
Human Resources	COMPANY_TABLE	Company	Image 34
Human Resources	COMPANY_TABLE_BRA	Company Brazil	Image 34
Human Resources	CONTRACT_DATA	Contract Data	Image 51
Human Resources	CONTRACT_TYPE_TBL	Contract Type Table	Image 51
Human Resources	DEPARTMENT_TBL	Department	Image 34
Human Resources	ESTAB_TBL_BRA	Establishment Table Brazil	Image 34
Human Resources	ESTABLISHMENT_DATA	Establishment	Image 34
Human Resources	HCTS_CO_DIRECT_FL	View Snapshot	Image 30
Human Resources	HR_ADDR_MAP_FL	Address	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources	HR_AG_CHECKLIST_FL	AG Checklist (activity guide checklist)	Image 45
Human Resources	HR_BUSINESS_UNIT	Business Unit	Image 34
Human Resources	HR_DTLN_FL	Dotted Line	Image 30
Human Resources	HR_EE_PROFILE_FL	Display Employee Profile Info	Image 48
Human Resources	HR_I9_CONFIG_FL	Work Authorization Setup	Image 50
Human Resources	HR_I9_DB_FL	Manage Form I-9	Image 50
Human Resources	HR_I9_FILTERS_FL	Filters (I-9)	Image 50
Human Resources	HR_I9EVRFYCMP_FL	Everify Case Status	Image 50
Human Resources	HR_JOB_DATA_SUM_FL	Job Actions Summary	Image 36
Human Resources	HR_JOBDATA_ACT_FL	Job Data Related Actions	Image 36
Human Resources	HR_OBD_ACTIVITY_FL	OnBoarding Activity	Image 30
Human Resources	HR_OBD_ADMIN_FL	OnBoarding Status - Admin	Image 30
Human Resources	HR_OBD_ATT_DNLD_FL	OnBoarding AG Document Downld	Image 30
Human Resources	HR_OBD_ATT_UPLD_FL	OnBoarding AG Attachment Upld	Image 30
Human Resources	HR_OBD_PB_INS_FL	Preboarding Summary	Image 50
Human Resources	HR_OBD_PB_SUM_FL	Preboarding Summary	Image 50
Human Resources	HR_OBD_PHOTO_FL	OnBoarding Photo / Pref Name	Image 30
Human Resources	HR_OBD_PROCESS_FL	OnBoarding Activities	Image 51
Human Resources	HR_OBD_STATUS_FL	OnBoarding Status	Image 30
Human Resources	HR_OBD_ST_LIST_FL	OnBoarding Status for Manager	Image 30
Human Resources	HR_ORGREL_ACT_FL	Org Rel Related Actions123	Image 47
Human Resources	HR_PERS_ORG_REL_FL	Organizational Relationship	Image 47
Human Resources	HR_RW_ACK_FL	Remote Worker Acknowledgements	Image 40
Human Resources	HR_RW_ADD_RQST_FL	Remote Worker Add Request	Image 40
Human Resources	HR_RW_ATTACH_FL	Attachments (Remote Worker)	Image 40
Human Resources	HR_RW_LAND_MGR_FL	Request Details (Remote Worker)	Image 40
Human Resources	HR_RW_LANDING_FL	Remote Worker Requests	Image 40

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources	HR_RW_RQSTDTL_FL	Remote Worker	Image 40
Human Resources	HR_RW_SUB_CNF_FL	Remote Work Submit Confirm	Image 40
Human Resources	HR_RWORK_LAND_FL	Remote Worker Requests	Image 40
Human Resources	HRBP_MBR_OVRLAP_FL	View Overlapping Members	Image 32
Human Resources	HRBP_SEL_TEAM_FL	Select Business Partner Team	Image 31
Human Resources	HRBP_VIEW_TEAM_FL	Business Partner Team Details	Image 31
Human Resources	HRCD_CO_DIRECT_FL	Company Directory Home	Image 30
Human Resources	HRCD_ORG_CHART_FL	Org Chart	Image 30
Human Resources	HRCD_ORG_EXP_FL	Export	Image 30
Human Resources	HRCD_PROFILE_FL	Company Directory Profile	Image 30
Human Resources	HRRC_ADMN_RECOG_FL	Recognition Administration	Image 48
Human Resources	HRRC_CREATE_RCG_FL	Create Recognition	Image 48
Human Resources	HRRC_EE_TILE_FL	Employee Recognition Tile	Image 48
Human Resources	HRRC_ESS_RECOG_FL	Recognition	Image 48
Human Resources	HRRC_MGR_TILE_FL	Team Recognition Tile	Image 48
Human Resources	HRRC_MSS_RECOG_FL	Team Recognition	Image 48
Human Resources	HRRC_USER_PREF_FL	Recognition User preferences	Image 48
Human Resources	HRRC_VIEW_RECOG_FL	View Recognitions	Image 48
Human Resources	HRTR_EE_LANDING_FL	Tuition Reimbursement Landing	Image 54
Human Resources	HRTR_EE_TUITION_FL	Tuition Reimbursement Request	Image 54
Human Resources	JOB_CODE_TBL	Job Code Table	Image 34
Human Resources	JOB_DATA_ADD_FL	Add Organization Relationship	Image 47
Human Resources	JOB_DATA_ADDSUB_FL	Submit Confirmation	Image 47
Human Resources	JOB_DATA_FL	Job Data	Image 36
Human Resources	JOB_DATA_RVW_FL	Review and Submit	Image 47
Human Resources	JOB_DATA_SUBMIT_FL	Job Data Submit Confirmation	Image 36
Human Resources	JOB_DATA_VW_FL	View Details	Image 36
Human Resources	JOB_FAMILY	Job Family Table	Image 34

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources	LOCATION_TABLE	Location	Image 34
Human Resources	LOCATION_TABLE_BRA	Location Table BRA	Image 34
Human Resources	LOCATION_TABLE_MIL	Location	Image 34
Human Resources	PERS_POI_ADD_FL	Add Person of Interest	Image 47
Human Resources	PERS_POI_MAINT_FL	Maintain Person of Interest	Image 47
Human Resources	PERSON_SUB_CNF_FL	Person Confirmation	Image 47
Human Resources	PERSONAL_DATA_FL	Personal Data	Image 47
Human Resources	POS_CI_EXEP_CMP_FL	CI Exceptions for Position	Image 30
Human Resources	POS_SUB_CNF_FL	Position Submit Confirmation	Image 30
Human Resources	POSITION_DATA_FL	Position Data Fluid	Image 30
Human Resources	POSITION_DATA_V_FL	Position Data View	Image 30
Human Resources	POSITION_DETAIL_FL	Position Details	Image 30
Human Resources	SRCH_PERSON_FL	Create Employee	Image 47
Human Resources (Base Benefits)	BEN_ADM_SUMM_FL	Employee Benefits Summary	Image 33
Human Resources (Base Benefits)	BEN_ATTACH_EVNT_FL	Review Benefits Attachment	Image 37
Human Resources (Base Benefits)	BEN_ATTACH_EVNTEFL	Review Benefits Attachment	Image 37
Human Resources (Base Benefits)	BEN_ATTACH_FL	Benefits Fluid Attachments	Image 37
Human Resources (Base Benefits)	BEN_ATTACH_IDE_FL	Transaction Details	Image 37
Human Resources (Base Benefits)	BEN_LIFE_ALLOC_FL	Plan type 2x Benef Allocation	Image 32
Human Resources (Base Benefits)	BEN_PEN_ALLOC_FL	Pension Plan allocation	Image 33
Human Resources (Base Benefits)	BEN_SAVE_ALLOC_FL	Plan type 4x Benef Allocation	Image 32
Human Resources (Base Benefits)	BEN_SUMM_DTL_FL	Benefit Summary Detail	Image 32
Human Resources (Base Benefits)	BEN_SUMM_GRID_FL	Benefits Summary	Image 32
Human Resources (Base Benefits)	W3EB_BR_ADPT_FL	Birth and Adoption	Image 35
Human Resources (Base Benefits)	W3EB_DEPBEN_DTL_FL	Dep/Ben Info	Image 30
Human Resources (Base Benefits)	W3EB_DEPBNSMRY_FL	Dependent/ Beneficiary Summary	Image 30
Human Resources (eBenefits)	ACA_EE_YE_FORM_FL	View Form 1095-C Fluid	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (eBenefits)	ACA_SS_CONSENT_FL	1095-C Delivery Preferences	Image 30
Human Resources (eBenefits)	W3EB_SEL_EVNT_FLU	Select Your Event	Image 30
Human Resources (eProfile)	HCTS_JOBS_SEL_FL	Select Jobs	Image 52
Human Resources (eProfile)	HR_ADDTL_INFO_FL	Additional Information	Image 30
Human Resources (eProfile)	HR_DISABILITY_FL	Disability	Image 30
Human Resources (eProfile)	HR_EE_ADDR_FL	Addresses	Image 30
Human Resources (eProfile)	HR_EE_BUS_PRTNR_FL	Employee Business Partners	Image 31
Human Resources (eProfile)	HR_EE_CONTACTS_FL	Contact Details	Image 30
Human Resources (eProfile)	HR_EE_GENDER_FL	Gender Identity	Image 41
Human Resources (eProfile)	HR_EE_MARITAL_FL	Marital Status	Image 30
Human Resources (eProfile)	HR_EE_NAME_FL	Name	Image 30
Human Resources (eProfile)	HR_EE_NAME_VW_FL	Fluid Name Details	Image 30
Human Resources (eProfile)	HR_EE_SOC_MEDIA_FL	Social Media	Image 30
Human Resources (eProfile)	HR_ESS_JA_VWRQ_FL	ESS Resignation View Request	Image 31
Human Resources (eProfile)	HR_ESS_JA_VWRT_FL	ESS Retirement View Request	Image 31
Human Resources (eProfile)	HR_ESS_RESGN_FL	ESS Resignation Submission	Image 31
Human Resources (eProfile)	HR_ESS_RETIRE_FL	ESS Retirement Submission	Image 31
Human Resources (eProfile)	HR_EMERG_CNTCT_FL	Self Service Emergency Contact	Image 30
Human Resources (eProfile)	HR_ETHNIC_GRP_FL	Ethnic Groups	Image 30
Human Resources (eProfile)	HR_HOME_MAIL_VW_FL	Fluid Address Details	Image 30
Human Resources (eProfile)	HR_I9_EE_FL	Form I-9	Image 30
Human Resources (eProfile)	HR_VET_STATUS_FL	Veteran Status	Image 30
Human Resources (eProfile)	HRMH_CREAT_TEAM_FL	Create Matrix Team	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (eProfile)	HRMH_MTRX_INFO_FL	Types of Matrix Teams	Image 30
Human Resources (eProfile)	HRMH_MTRX_TRAN_FL	Matrix Team Details	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_BONUS2_FL	ESnapshot Bonus History	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CAREERPLN_FL	Career Plans	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CAREERPLN2_FL	Career Plans	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CMP_SALCUR_FL	ESnapshot Current Salary	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CMP_SALHST_FL	ESnapshot Salary History	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CMP_TRW_FL	ESnapshot View Total Rewards	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_COMP_HIST_FL	Compensation	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_CONT_CMP1_FL	Content Details	Image 32
Human Resources (eProfile Manager Desktop)	HCTS_CONT_DTL2_FL	Content Details	Image 33
Human Resources (eProfile Manager Desktop)	HCTS_DEV_HIST_FL	Development History	Image 31
Human Resources (eProfile Manager Desktop)	HCTS_DEVHIST2_FL	ESnapshot Development History	Image 31
Human Resources (eProfile Manager Desktop)	HCTS_EDUCATION_FL	Education	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_EGPROJ_CMP_FL	E&G Projects	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_ESNAP_CFG_FL	Configure Snapshot	Image 30
Human Resources eProfile Manager Desktop	HCTS_HONORS_CMP_FL	Honors and Awards	Image 30

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (eProfile Manager Desktop)	HCTS_JOB_DTLS_FL	Job Details	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_JOB_HIST_FL	Job Details	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_JOBCOMP_DT_FL	Job Competencies	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_JOBCOMPDTL_FL	Job Competencies	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_JOBINTCMP1_FL	Job Interests	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_LICENSE1_FL	Licenses and Certifications	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_LICENSE2_FL	Employee Snapshot Licenses	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_PERF_HIST_FL	Performance History	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_PERFHIST2_FL	ESnapshot Performance History	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_PERS_COMP_FL	Personal Competencies	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_PROJ_CMP_FL	Special Projects	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_RATINGBOX2_FL	Employee Impact tile	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_RECOG_LIST_FL	Recognitions	Image 52
Human Resources (eProfile Manager Desktop)	HCTS_RESP_CMP_FL	Responsibilities	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_RESP_CMP1_FL	Responsibilities	Image 30
Human Resources (eProfile Manager Desktop)	HCTS_RW_LAUNCH_FL	Remote Worker	Image 52

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (eProfile Manager Desktop)	HCTS_SUCC_PLN_FL	Personal Competencies	Image 30
Human Resources (eProfile Manager Desktop)	HR_DR_TEAM_FLU	My Team	Image 30
Human Resources (eProfile Manager Desktop)	HR_GSS_CT_POS_FL	Guided Self Service	Image 52
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_CMP_AGFL	Guided Self Service	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_DSUP_FL	Decision Support	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_FL	Guided Self Service	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_JB_AGFL	Guided Self Service	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_MAATT_FL	GSS Fluid Approval Attachments	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_MACMP_FL	GSS Fluid Approval Comp Detail	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_POS_AGFL	Guided Self Service	Image 30
Human Resources (eProfile Manager Desktop)	HR_MSS_CT_SBM_AGFL	Guided Self Service	Image 30
Human Resources (Health and Safety)	HS_ESS_INCDREPT_FL	Report Incident	Image 36
Human Resources (Health and Safety)	HS_ESS_INCDVIEW_FL	View Incident	Image 36
Human Resources (Health and Safety)	HS_IMMUN_ATTACH_FL	Vaccine Attachments	Image 40
Human Resources (Health and Safety)	HS_INCDT_ATT_FL	Attachments	Image 49
Human Resources (Health and Safety)	HS_INCDT_START_FL	Health and Safety	Image 36
Human Resources (Health and Safety)	HS_SS_ATTACH_FL	Attachments	Image 36
Human Resources (Health and Safety)	HS_SS_ALLERGY_FL	Allergies	Image 40
Human Resources (Health and Safety)	HS_SS_IMMUN_FL	Vaccinations	Image 40

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (Health and Safety)	HS_SS_IMMUNVIEW_FL	View Vaccine Details	Image 40
Human Resources (Health and Safety)	HS_SS_TEST_FL	Test Results	Image 40
Human Resources (Health and Safety)	HS_SS_TESTVIEW_FL	View Test Details	Image 40
Human Resources (Health and Safety)	HS_TEST_ATTACH_FL	Test Attachments	Image 40
Human Resources (Health and Safety)	HS_INCDT_LIST_FL	Report Incident	Image 53
Human Resources (Position Management)	POSN_INCUM_ALL_FL	Incumbents	Image 48
Human Resources (Position Management)	POSN_PRI_INCUMB_FL	Manage Primary Incumbents	Image 33
Human Resources (Profile Management)	JPM_ACK_STATUS_FL	Acknowledgement Status	Image 41
Human Resources (Profile Management)	JPM_CAT_ITEM_FL	Profile Item Details	Image 46
Human Resources (Profile Management)	JPM_COMP_ADM_FL	Profile Compare	Image 36
Human Resources (Profile Management)	JPM_COMPRF_SRCH_FL	Job Profile Search	Image 36
Human Resources (Profile Management)	JPM_CPY_JB_ITM_FL	Profile Item Details	Image 51
Human Resources (Profile Management)	JPM_COPY_JOB_FL	Copy Job Items	Image 38
Human Resources (Profile Management)	JPM_CSC_COMPARE_FL	Profile Compare Results	Image 36
Human Resources (Profile Management)	JPM_EMP_RELPROF_FL	Profile Selection	Image 36
Human Resources (Profile Management)	JPM_INTEREST_FL	Interest List	Image 37
Human Resources (Profile Management)	JPM_ITM_DTL_FL	Profile Item Details	Image 30 Image 33
Human Resources (Profile Management)	JPM_ITM_UPD_FL	Profile Item Details	Image 51
Human Resources (Profile Management)	JPM_PERS_PROFL_FLU	Talent Profile	Image 30
Human Resources (Profile Management)	JPM_SRCH_CRIT_FL	Profile Search Criteria	Image 36
Human Resources (Profile Management)	JPM_SRCH_LIST_FL	Search and Compare Profiles	Image 36
Human Resources (Profile Management)	JPM_SRCH_RESULT_FL	Fluid Profile Search	Image 36

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Product	Component	Component Description	Image Drop Zone Enabled
Human Resources (Shared Component)	HCSC_APRV_CHAIN_FL	Approval Chain	Image 52
Human Resources (Shared Component)	HCSC_CAL_SETUP_FL	Calendar Setup Component	Image 41
Human Resources (Shared Component)	HCSC_CAL_USPREF_FL	Calendar User Preferences	Image 41
Human Resources (Shared Component)	HCSC_CALENDAR_FLU	Team Calendar	Image 41
Human Resources (Shared Component)	HCSC_SS_RPT_LND_FL	Self-Service Reports	Image 30
Human Resources (Shared Component)	HCSC_TR_CONF_FLU	Traverser Configuration	Image 55
Human Resources (Shared Component)	HCSC_TR_PNLCFG_FLU	Traverser Component Mapping	Image 55
Human Resources (Shared Component)	HR_MGR_SEL_FLU	Manager Selector	Image 30
Human Resources (Shared Component)	HR_PSEL_FLU	Person Selector	Image 30
Human Resources (Notifications Framework - delivered as Notification Publisher for Enterprise Components in Image 53)	HCSC_ANNOUNCE_FL	Announcements	Image 30
Human Resources (Notifications Framework)	HCSC_NOTIF_ADH_FLU	HR Notification	Image 30
Payroll	DEDUCTION_TABLE	Deduction Table	Image 55
Payroll	DEDUCTION_TABLE1	Deduction Table	Image 55
Payroll	EARNINGS_TABLE	Earnings Table	Image 55
Payroll	EARNINGS_TABLE1	Earnings Table	Image 55
Payroll	GENL_DEDUCTION_TBL	General Deduction Table	Image 55
Payroll	PAYGROUP_TABLE	Paygroup Table	Image 34
Payroll	PAYGROUP_TABLE1	Pay Group	Image 34
Payroll for North America (ePay)	PY_1099R_CONS_FL	1099-R Consent	Image 47
Payroll for North America (ePay)	PY_1099R_YE_FRM_FL	View 1099-R Forms	Image 47
Payroll for North America (ePay)	PY_ADM_YE_FORM_FL	View T4/T4A Slips	Image 54
Payroll for North America (ePay)	PY_ADM_YE_MRQ_FL	View RL-1/RL-2 Slips	Image 54
Payroll for North America (ePay)	PY_ADM_YE_W2_FL	View W-2/W-2c Forms	Image 54

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Product	Component	Component Description	Image Drop Zone Enabled
Payroll for North America (ePay)	PY_IC_DIR_DEP_FL	Fluid SS Direct Deposit	Image 30
Payroll for North America (ePay)	PY_IC_PAY_INQ_FLU	Pay	Image 31
Payroll for North America (ePay)	PY_IC_TD1_FL	Tax Withholding ESS	Image 46
Payroll for North America (ePay)	PY_IC_W4_FL	Tax Withholding	Image 30
Payroll for North America (ePay)	PY_NRA_CONSENT_FL	1042-S Consent	Image 47
Payroll for North America (ePay)	PY_NRA_YE_FORM_FL	View Form 1042-S	Image 47
Payroll for North America (ePay)	PY_RL_CONSENT_FL	RL Consent Component	Image 30
Payroll for North America (ePay)	PY_SS_YE_RL_VW_FL	RL View Forms	Image 30
Payroll for North America (ePay)	PY_T4_CONSENT_FL	Fluid T4/T4A Consent	Image 30
Payroll for North America (ePay)	PY_T4_YE_FORM_FL	View Year End Slips	Image 30
Payroll for North America (ePay)	PY_W2_CONSENT_FL	Fluid W-2/W-2c Consent	Image 30
Payroll for North America (ePay)	PY_W2_YE_FORM_FL	W-2/W-2c Fluid View Forms	Image 30
Payroll for North America (ePay)	PY_MOD_CHK_FL	Paycheck Modeler	Image 52
Payroll for North America (ePay)	PY_MOD_CHK_ADM_FL	Paycheck Modeler for Admin	Image 53
Recruiting	HRS_AG_HDR_MULT_FL	Multiple Job Postings Context	Image 30
Recruiting	HRS_CG_APPLY_FL	Job Application	Image 30
Recruiting	HRS_CG_CAREERS_FL	Careers	Image 30
Recruiting	HRS_CG_CONFIRM_FL	Application Confirmation	Image 30
Recruiting	HRS_CG_SEARCH_FL	Careers	Image 30
Recruiting (Candidate Gateway)	HRS_CONF_FL	Screen Reader Change Confirmation	Image 39
Recruiting	HRS_GACT_APP_ST_FL	Change Applicant Status	Image 30
Recruiting	HRS_JO_NOTE_FL	Job Opening Notes	Image 30
Recruiting	HRS_JOB_CAT_CMP_FL	Personalize Job categor-fluid	Image 30
Recruiting	HRS_MGR_SUMM_FLU	Recruiting Manager Summary	Image 30
Recruiting	HRS_MY_APPS_FL	My Applicants	Image 41
Recruiting	HRS_MY_JOBS_FLU	My Job Openings	Image 41

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Product	Component	Component Description	Image Drop Zone Enabled
Recruiting	HRS_OPEN_JO_FLU	My Open Jobs	Image 30
Recruiting	HRS_PE_MY_APPS_FL	My Applicants	Image 30
Recruiting	HRS_PE_MY_INTVW_FL	My Interviews	Image 30
Recruiting	HRS_PE_MY_JOBS_FLU	My Job Openings	Image 30
Recruiting	HRS_REFER_FL	Refer Friend	Image 30
Recruiting	HRS_RELACT_CONF_FL	Group Actions	Image 30
Recruiting	HRS_USER_PREF_FL	Recruiting User Preferences	Image 33
Salary Planning	SALARY_GRADE_TBL	Salary Grade Tables	Image 34
Salary Planning	SALARY_PLAN_TABLE	Salary Plan Table	Image 34
Time & Labor (TL Scheduling)	MNG_EMP_SCH_FL	Fluid Manage schedules	Image 40
Time & Labor	SCH_AENRL_REJ_FL	Reject Enrollments	Image 37
Time & Labor	SCH_EE_REQ_FL	Request Schedule Change	Image 44
Time & Labor	SCH_EE_REQ_XFER_FL	Emp Schedule Request XFR	Image 44
Time & Labor	TL_ABS_RUN_CNTL_FL	Generate Absence Payable Time	Image 30
Time & Labor	TL_ADM_QF_LND_FLU	Manage Quick-Fill	Image 52
Time & Labor	TL_ADM_QF_TIME_FLU	Admin QuickFill	Image 52
Time & Labor	TL_AENRL_ER_IGN_FL	Ignore Error	Image 30
Time & Labor	TL_AENRL_MARK_FL	Mark Enrollments	Image 30
Time & Labor	TL_AENRL_POST_FL	Post Enrollments	Image 30
Time & Labor	TL_AENRL_PREV_FL	Auto Enrollment	Image 30
Time & Labor	TL_AENRL_REJECT_FL	Reject Enrollments	Image 30
Time & Labor	TL_APPR_DYN_FLU	TL Approval Dynamic Tile	Image 55
Time & Labor	TL_ATTENDANCE_FL	Fluid Attendance Violations	Image 31
Time & Labor	TL_AUD_RPTTIME_FL	Audit Component	Image 31
Time & Labor	TL_COMPLEAVBAL_FLU	Leave Balances	Image 30
Time & Labor	TL_DSHBD_DIR_FLU	Dashboard header component	Image 55
Time & Labor	TL_DSHBD_FILT_FLU	Dashboard header component	Image 55
Time & Labor	TL_EMP_PRES_FLU	Workforce Availability	Image 30
Time & Labor	TL_EMPLDATA_C_FL	Create Time Reporter Data	Image 39
Time & Labor	TL_EMPLDATA_M_FL	Maintain Time Reporter Data	Image 39

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Product	Component	Component Description	Image Drop Zone Enabled
Time & Labor	TL_EMPL_EXCEP_FL	Employee View Exceptions	Image 30
Time & Labor	TL_ENTER_TIME_FLU	Fluid Timesheet	Image 30
Time & Labor	TL_MNG_GEO_OVRD_FL	Manage Geo-Fence Overrides	Image 54
Time & Labor	TL_PAYBTIME_FLU	Payable Time	Image 30
Time & Labor	TL_QUICK_FILL_FLU	Quick Fill Setup component	Image 30
Time & Labor	TL_TIME_SUM_FLU	Timesheet Summary	Image 30
Time & Labor	TL_TR_COMMENTS_FLU	Fluid Time Reporting Comments	Image 30
Time & Labor	TL_WC_RSLT_FL	Time and Labor WorkCenter	Image 35
Time & Labor	SCH_AENRL_ER_IG_FL	Ignore Error	Image 30
Time & Labor	SCH_AENRL_MARK_FL	Mark Enrollments	Image 30
Time & Labor	SCH_AENRL_POST_FL	Post Enrollments	Image 30
Time & Labor	SCH_AENRL_REJ_FL	Reject Enrollments	Image 30
Time & Labor	TL_ML_BRK_WVR_FL	Meal Break Waiver	Image 50
Time & Labor	TL_MNG_EXCEP_FL	Manage Exceptions	Image 30
Time & Labor	TL_MSS_EMP_MAP_FL	Reporting Locations	Image 30
Time & Labor	TL_PRE_POP_ELP_FL	Report Time	Image 30
Time & Labor	TL_RPT_TIME_FLU	Report Time	Image 30
Time & Labor	TL_USER_PREF_FLU	User preferences	Image 30
Time & Labor	TL_WEEKLY_TIME_FLU	Weekly Time	Image 30

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Working with PeopleSoft Fluid WorkCenters

Understanding PeopleSoft Fluid WorkCenters

The PeopleSoft Fluid WorkCenter Framework is an Enterprise Components feature that allows system administrators to create WorkCenters that can be accessed using devices, such as:

- Smart Phones (SFF: small form factor).
- Tablets (MFF: medium form factor).
- Laptops and desktops. (LFF: large form factor)

PeopleSoft Fluid WorkCenters are designed for specific roles and provide a central area for users to access key components within PeopleSoft applications. They enable users to access various pages and perform daily tasks without leaving the WorkCenter.

Refer the Enterprise Components: Configuring Pagelets to set up group boxes in PeopleSoft Fluid WorkCenters as a system administrator.

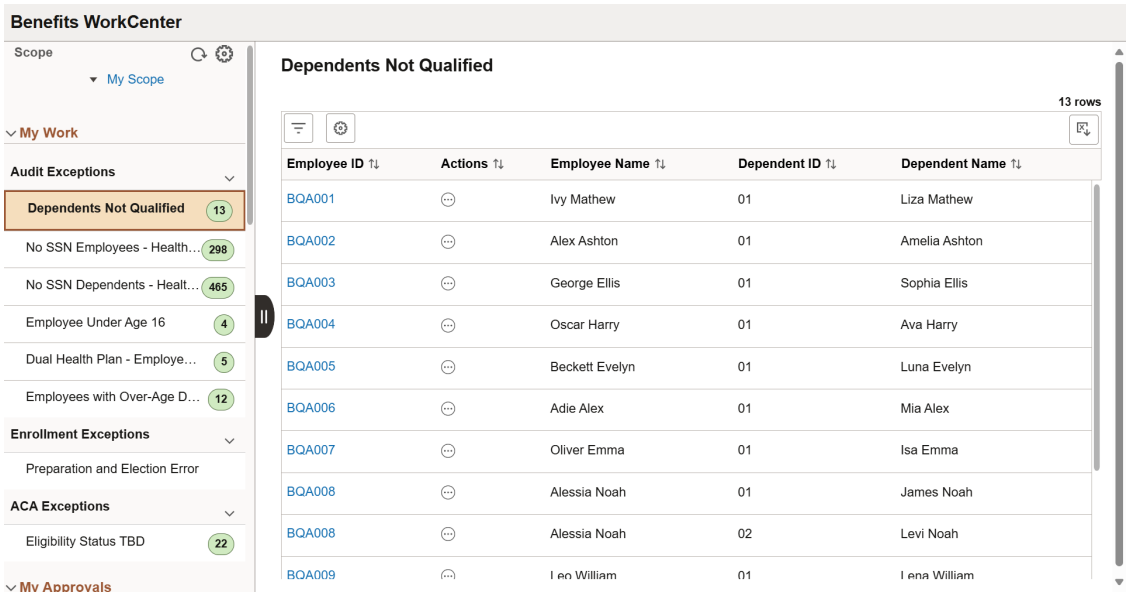
Example: Benefits WorkCenter Page

This example illustrates the Benefits WorkCenter page in PeopleSoft Fluid.

> **Note**
>
> Other PeopleSoft Fluid application-specific WorkCenters may appear slightly different. This is provided as a general example of a WorkCenter as it appears in PeopleSoft Fluid.

This example illustrates the Benefits WorkCenter Page.

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WorkCenter Setup, Maintenance, and Personalization

When setting up and maintaining a Fluid WorkCenter, setup options are defined at the system administrator level, and personalization options are defined at the user level.

System administrators must perform their setup first, using the Enterprise Components, WorkCenter/Dashboards component.

As an administrator, you can set up:

- Configuration IDs for WorkCenters.
- The users who can access the Scope field on the WorkCenter.
- The order in which the group boxes appear, such as Links and My Work.
- The order in which the links appear within each group box.

For more information on administrator-level setup, refer to Enterprise Components: Configuring Pagelets and Enterprise Components: Configuring Filter Definitions and Values.

End users perform their personalization options using the Display Options, Edit Filters, and Scope options in the Fluid WorkCenter.

For more information on user-level personalization, refer to Setting Up and Personalizing PeopleSoft Fluid WorkCenters.

Understanding Delivered WorkCenters and Dashboards

This section provides lists of the delivered PeopleSoft WorkCenters and Dashboards.

Related Topics

- Enterprise Components: Understanding WorkCenters and Dashboards

Delivered WorkCenters

This table lists PeopleSoft-delivered WorkCenters:

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WorkCenter	Link to Product Documentation for Classic WorkCenter	Link to Product Documentation for Fluid WorkCenter
Absence Management WorkCenter		See PeopleSoft Absence Management: Using the Fluid Absence Management WorkCenter
(Fluid) Benefits WorkCenter		See PeopleSoft Benefits Administration: Using the Fluid Benefits WorkCenter
Global Payroll WorkCenter		See PeopleSoft Global Payroll: Using the Fluid Global Payroll WorkCenter
Performance Process	See PeopleSoft ePerformance: Understanding ePerformance WorkCenter	
Payroll WorkCenter Canada	See PeopleSoft Payroll for North America: Using the Payroll WorkCenter	See PeopleSoft Payroll for North America: (CAN) Using the Fluid Payroll WorkCenter
Payroll WorkCenter USA	See PeopleSoft Payroll for North America: Using the Payroll WorkCenter	See PeopleSoft Payroll for North America: (USA) Using the Fluid Payroll WorkCenter
Time and Labor WorkCenter	See PeopleSoft Time and Labor: Using the Time and Labor WorkCenter	See PeopleSoft Time and Labor: Using the PeopleSoft Fluid User Interface to Work with Time and Labor as an Administrator

Delivered Dashboards

This table lists PeopleSoft-delivered Dashboards:

Dashboard	Link to Product Documentation for Classic Dashboard	Link to Product Documentation for Fluid Dashboard
Absence Administration		See PeopleSoft Absence Management: Using the PeopleSoft Fluid User Interface to Work with Absences as an Administrator
Absence Analytics Dashboard	See PeopleSoft Absences Management: Using the Absence Analytics Dashboard Pagelets	
Benefits Details		See PeopleSoft Benefits Administration: Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface
Career Planning (Snapshot)		See PeopleSoft eProfile Manager Desktop: Viewing the Career Planning Tiles and Pages

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Dashboard	Link to Product Documentation for Classic Dashboard	Link to Product Documentation for Fluid Dashboard
Compensation Review (Snapshot)		See PeopleSoft eProfile Manager Desktop: Viewing the Compensation Review Tiles and Pages
Delegations		See Enterprise Components: Understanding Delegation
Global Payroll		See PeopleSoft Global Payroll: Using the PeopleSoft Fluid User interface to Manage Payroll as an Employee
Health and Safety		See PeopleSoft Human Resources Monitor Health and Safety: Working with Health and Safety Activities as Employees Using Fluid
Manage Health and Safety		See PeopleSoft Human Resources Monitor Health and Safety: Managing Health and Safety Tasks as Administrators Using Fluid
Manage Human Resources		See PeopleSoft Human Resources Administer Workforce: Managing Human Resources Tasks as an Administrator
Manager Dashboard	See PeopleSoft eProfile Manager Desktop: Understanding the Manager Dashboard Content and Layout	
My Profiles		See PeopleSoft eDevelopment: Using the PeopleSoft Fluid User Interface to Manage Profile Data as an Employee and Manager
OnBoarding		See PeopleSoft Human Resources Administer Workforce: Accessing the PeopleSoft OnBoarding Dashboard as an Employee
Payroll		See PeopleSoft ePay: Using the PeopleSoft Fluid User Interface to Perform Payroll Tasks as Employees
Payroll Insights		See PeopleSoft Payroll for North America: Viewing Payroll Insights
Performance Review (Snapshot)		See PeopleSoft eProfile Manager Desktop: Viewing the Performance Review Tiles and Pages

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Dashboard	Link to Product Documentation for Classic Dashboard	Link to Product Documentation for Fluid Dashboard
Personal Details		See PeopleSoft eProfile: (Fluid) Reviewing and Updating Personal Information
Position Management		See PeopleSoft Human Resources Manage Positions: Performing Position Management Tasks as an Administrator Using Fluid
Profile Administration		See PeopleSoft Human Resources Manage Profiles: Managing Profile Administration Tasks Using Fluid
Promotion Readiness (Snapshot)		See PeopleSoft eProfile Manager Desktop: Viewing the Promotion Readiness and Career Details Tiles and Pages
Summary (Snapshot)		See PeopleSoft eProfile Manager Desktop: Viewing the Snapshot - Summary Tiles and Pages
Talent Summary	See PeopleSoft eProfile Manager Desktop: Understanding the Talent Summary Content and Layout	
Team Profiles		See PeopleSoft eDevelopment: Using the PeopleSoft Fluid User Interface to Manage Profile Data as an Employee and Manager
Time		See PeopleSoft Time and Labor: Using PeopleSoft Fluid User Interface for Time Reporting as an Employee
Time and Labor		See PeopleSoft Time and Labor: Using the PeopleSoft Fluid User Interface to Work with Time and Labor as an Administrator
Time and Labor Dashboard	See PeopleSoft Time and Labor: Working with Time and Labor Dashboard	
Recruiting Home	See PeopleSoft Talent Acquisition Manager: Defining the Content and Layout of the Recruiting Home	
Recruiting Insight		See PeopleSoft Talent Acquisition Manager: Using the PeopleSoft Fluid User Interface to View Recruiting Analytics

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Dashboard	Link to Product Documentation for Classic Dashboard	Link to Product Documentation for Fluid Dashboard
Workforce Insight		See PeopleSoft Human Resources Administer Workforce: Viewing Workforce Insight Reports as an HR Administrator Using Fluid
Manage Benefits		See PeopleSoft Benefits Administration: Using the PeopleSoft Fluid User Interface to Manage Benefits as an Administrator
Open Enrollment Insights		See PeopleSoft Benefits Administration: Viewing Open Enrollment Insights
Life Events Insights		See PeopleSoft Benefits Administration: Viewing Life Events Insights
Ben Admin Processing Insights		See PeopleSoft Benefits Administration: Viewing Ben Admin Processing Insights
Benefits Utilization		See PeopleSoft Benefits Administration: Viewing Benefits Utilization Insights

Note

PeopleSoft HCM also delivers many dashboards to view application analytical data. For a list of the analytic dashboards, see Understanding PeopleSoft Insights Using PeopleSoft Search Framework.

Setting Up and Personalizing PeopleSoft Fluid WorkCenters

This section discusses the user level personalization options available in PeopleSoft Fluid WorkCenters.

Pages Used to Set Up and Personalize PeopleSoft Fluid WorkCenters

Page Name	Definition Name	Usage
Enterprise Components: Configure Pagelets - WorkCenter/Dashboard Page	FSPC_ADMIN_MAIN	Define configuration IDs for Classic WorkCenters and Dashboards, and Fluid WorkCenters.
Enterprise Components: Configure Pagelets - My Work Page	FSPC_ADMIN_MYWORK	Set up My Work links for end users.
Personalize Page (Fluid)	EOWC_PERSONAL_FL	Personalize the display options for the group boxes in the WorkCenter.

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Page Name	Definition Name	Usage
Maintain Scope Detail Page	EOWC_EDITVIEWLK_FL	Change scope detail options for collapsible sections in the My Work group box.
Configure Scope Values Page	EOWC_EDITVIEWVA_FL	Modify filter values for your link.
Configure Scope Page	EOWC_EDITVIEWBY_FL	Personalize scope for the WorkCenter based on their specific requirements.
Create Scope Page	EOWC_EDITVIEWN_SCF	Create new scopes.
Refine Filter Criteria Page	EOWC_EDITVIEWVA_FL	Select one or more criteria to narrow the search result.
Personalized Output Page	HWC_CONFIG_SCF	Modify the position of columns and to select the columns to be displayed as default for each work item.

Common Elements Used in WorkCenters

Most WorkCenters have a similar look and are configured the same. Some icons are developed in PeopleTools and appear on WorkCenter pages.

Field or Control	Description
Scope	Click the **Scope** drop down to change your scope option. Only users who have been given permission to access the **Scope** field have access to this drop down option. Use the Enterprise Components: Configure Pagelets - My Work Page. Enable the **Scope** check box to grant access to this field.

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Field or Control	Description
 (personalize)	Click the **Personalize** icon to access these options: • *Personalize*: Select to access the Personalize Page (Fluid) (EOWC_WORKLINKS_FL) for the application. You can perform these options for all expandable sections: – Determine if you want the group expanded or collapsed when you enter the page. – Determine if you want the system to show the transaction count for each label. – Determine if you want links to open in a new window. – Determine if you want the transaction to appear on the right side when you enter the page. • *Maintain Scope Detail*: Select to access the Maintain Scope Detail Page. **Note:**This option is only available when the **Scope** field is enabled for the user and is not available in SFF. • *Configure Scope*: Select to access the Configure Scope Page. **Note:**This option is only available when the **Scope** field is enabled for the user and is not available in SFF.
 (filter)	Select to access the Refine Filter Criteria Page where you can select filter values for the list of results. **Note:** This option is only available when the Scope field is not enabled for the user.
 (personalized output)	Select to modify the display settings for the grid on the Personalized Output Page.
 (show all columns)	Select to display all grid columns, including the ones that are set not to be displayed in the personalized grid setting. It appears after the **Display on Default View** option of a column is updated on the Personalized Output Page.
 (back to default view)	Select to display the grid based on the personalized grid setting on the Personalized Output Page. It appears after the **Show All Columns** icon is selected.
 (download to excel)	Select to load the grid information to a spreadsheet.
 (related actions)	Select an action to apply to the selected rows. Actions are specific to the selected section or exception. Action options for each user can be different based on their privileges.

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Field or Control	Description
⇅ (sort)	Select to access a modal window that lists all column headings. You can sort the entire grid on a column heading and optionally save that sort option as your default.

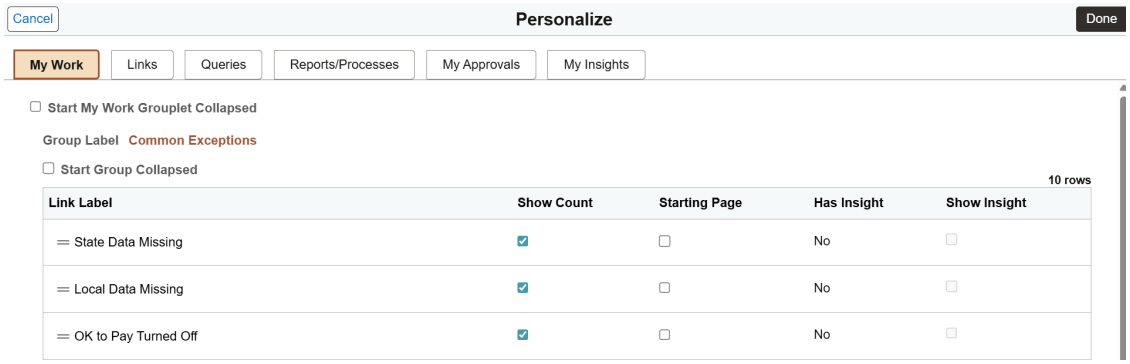
Personalize Page (Fluid)

Use the Personalize page (EOWC_PERSONAL_FL) to personalize your display options for the group boxes in fluid WorkCenter.

Navigation:

Select your WorkCenter tile in Fluid. Select the Personalize gear icon from the left panel and then select the *Personalize* option.

This example illustrates the fields and controls on the Personalize page.



The configured group boxes are displayed as tabs. As a user you can personalize each group box based on your requirement.

Field or Control	Description
Start [tab name] Grouplet Collapsed	Select this check box to have the corresponding group box (name shown on the tab) display as collapsed initially when you access the WorkCenter. By default, this check box is unchecked.
Start Group Collapsed	Select this check box to have the corresponding group (name shown in the **Group Label** field) of the group box display as collapsed initially when you access the WorkCenter. By default, this check box is unchecked.
Show Count	Select this check box for the links for which you want the system to generate to show count indicators. By default, this check box is selected.
Starting Page	Select this check box for the corresponding link to display as the start page on the right panel.

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Field or Control	Description
Has Insight	Displays *Yes* if the **Has Insight** field is selected for the corresponding link on the Enterprise Components: Configure Pagelets - My Work Page, which means that the link is set up to display an embedded insights dashboard. Displays *No* if the **Has Insight** field is cleared on the Configure Pagelets - My Work page.
Show Insight	Select this check box to display the embedded insights dashboard, followed by the data grid, when you select the link in the WorkCenter. Clear this check box to not display the insights dashboard. Only the data grid is shown when you select the link in the WorkCenter.

For more information on adding links to group boxes, see Enterprise Components: Configuring Pagelets.

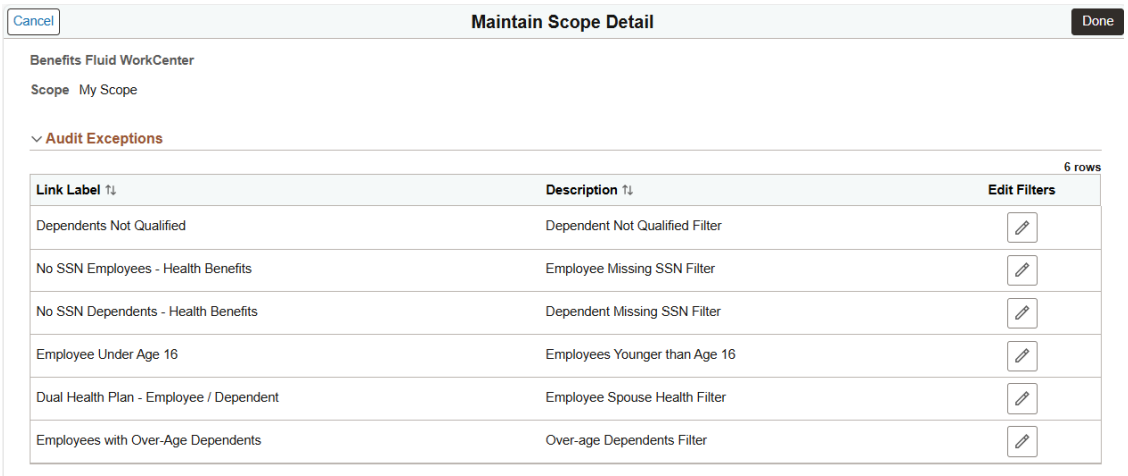
Maintain Scope Detail Page

Use the Maintain Scope Detail page (EOWC_EDITVIEWLK_FL) to change scope detail options for collapsible sections in the My Work group box.

Navigation:

Select your WorkCenter tile (Fluid). Click the Personalize icon on the left panel and then select the Maintain Scope Detail option.

This example illustrates the fields and controls on the Maintain Scope Detail page.



> **Note**
>
> This page is only available when the user has access to the Scope field.

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Field or Control	Description
Edit Filters	Select to modify filter values for the corresponding link on the Configure Scope Values Page.

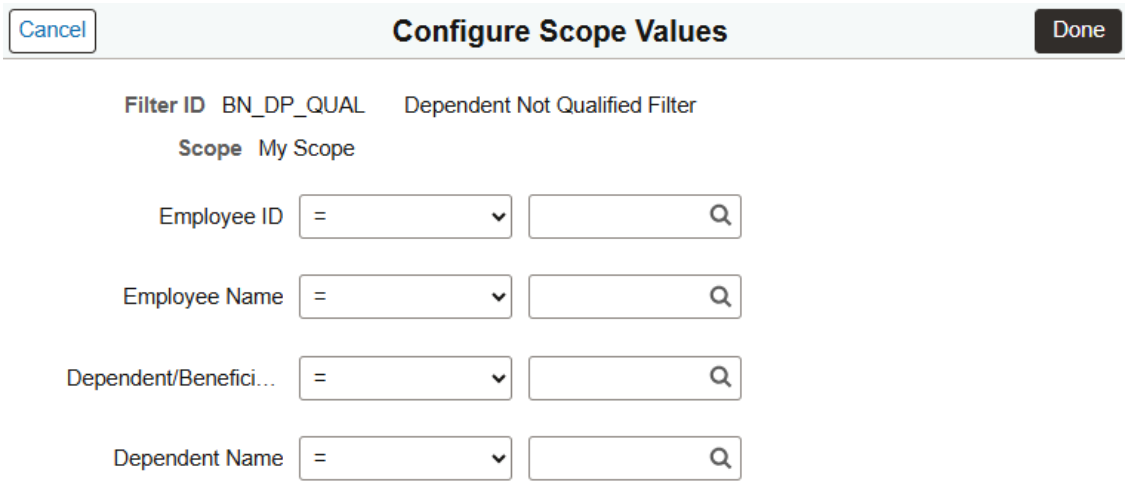
Configure Scope Values Page

Use the Configure Scope Values page (EOWC_EDITVIEWVA_FL) to modify filter values for your link.

Navigation:

Select the Edit Filters button on the Maintain Scope Detail page.

This example illustrates the fields and controls on the Maintain Scope Detail page.



When you access a link in the My Work group box of a WorkCenter, the system displays data based on the filter values you set up on this page for that link.

Configure Scope Page

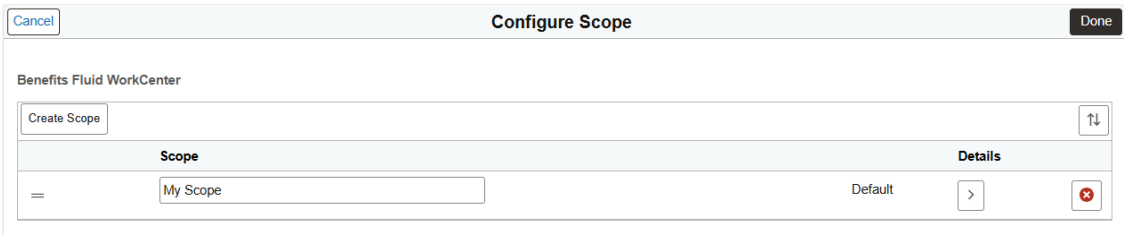
Use the Configure Scope page (EOWC_EDITVIEWBY_FL) to define personalized scope for the WorkCenter based on the specific requirements.

Navigation:

Select your WorkCenter tile (Fluid). Click the Personalize icon on the left panel and select the Configure Scope option.

This example illustrates the Configure Scope page.

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This page lists the available scopes for the WorkCenter. You can view details of the existing scopes, delete and create new scopes. Use the Details icon to view or manage scope details on the Maintain Scope Detail Page.

To create a new scope, click the Create Scope button.

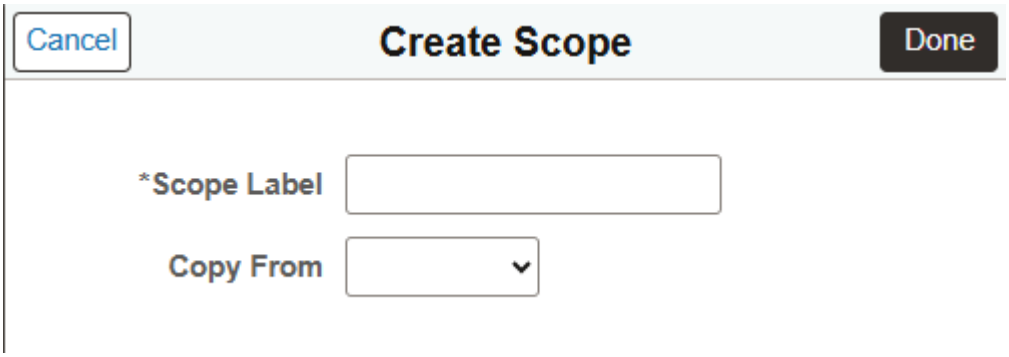
Create Scope Page

Use the Create Scope modal page (EOWC_EDITVIEWN_SCF) to create new scopes.

Navigation:

Select the Create Scope button on the Configure Scope page.

This example illustrates the Create Scope page.



Field or Control	Description
Scope Label	Enter a name for the new scope.
Copy From	You can copy the properties of an existing scope by selecting the required scope from the list.

Refine Filter Criteria Page

Use the Refine Filter Criteria page (EOWC_EDITVIEWVA_FL) to select one or more criteria to narrow the search result. The Filter icon appears green when filters have been applied to your search.

Navigation:

Select your WorkCenter tile (Fluid). Click the Filter icon on the right panel.

This example illustrates the Refine Filter Criteria page.

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Note

Filters are not applicable for the left panel. The count displayed on the left panel remains the same irrespective of the filter applied.

Personalized Output Page

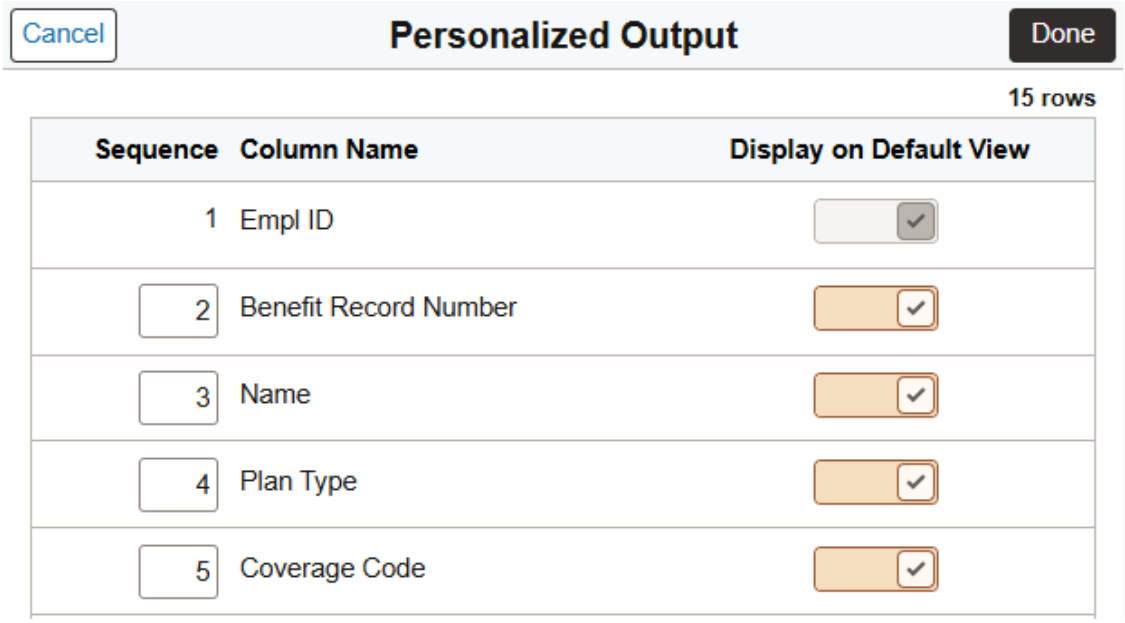
Use the Personalized Output page (HWC_CONFIG_SCF) to modify the position of columns and to select the columns to be displayed as default for each work item. This feature provides user the flexibility to personalize the columns and order of columns in right panel.

Navigation:

Select your WorkCenter tile (Fluid). Click the Personalized Output icon on the right panel.

This example illustrates the Personalized Output page.

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Setting Up Work Management for HCM WorkCenters

PeopleSoft HCM uses the Work Management Framework from Enterprise Components to view and manage transaction errors or warnings when they appear in My Work sections of a PeopleSoft WorkCenter.

To enable Work management for any work link ID in the WorkCenter, the first step is to populate relevant data (for each Work Link ID), into Work Management setup records. To automatically populate relevant data into the Work Management records, use the Work Management Setup (HCSC_WCLNKIDMAP_WM) component.

This topic provides an overview of setting up the Work Management to HCM WorkCenter Integration process and discusses the pages used to set up Work Management in HCM WorkCenters.

To understand the Work Management Framework before applying it to any WorkCenter, review Enterprise Components: Understanding the Work Management Framework.

Related Topics

- Enterprise Components: Setting Up and Using the Work Management Framework

Pages Used to Set Up Work Management for HCM

Page Name	Definition Name	Usage
HCM Work Management Setup Page	HCSC_WCLNKIDMAP_WM	Identify the WorkCenter and enable Work Management for a link ID transaction.

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Page Name	Definition Name	Usage
Map Fields Page	HCSC_WCMAPFLDS_SEC	Select fields you want to map to Work Management setup records. These fields will be used in uniquely identifying the transaction for which a Work Management Action is performed in the WorkCenter.
Configuring WorkCenter Related Actions Page	HCSC_WCRELACTN_SEC	Identify which Related Action Service IDs you want to enable for Work Management.

Setting Up the Work Management to HCM WorkCenter Integration Process

Follow these steps to set up and use the Work Management integration with PeopleSoft HCM WorkCenters:

> **Note**
>
> This feature requires you have implemented PeopleSoft HCM image 54 or later.

1. Assign the required role and permission list:
   - Role: *HCM Work Management Setup*
   - Permission List: *HCCPHCMWCINTGR*
2. (HCM) Enable Work Management for any work item of product specific WorkCenter, using the HCM Work Management Setup Page.

   You can use the following PeopleSoft HCM delivered WorkCenter configuration IDs or you can use your own:

Configuration ID	Description	Content Reference
BEN_FL	Benefits Fluid WorkCenter	HC_BEN_WC_RSLT_FL
GP_WC	Global Payroll WorkCentre	HC_GP_WC_RSLT_FL
PYCAN_FL	Canada Payroll Fluid WorkCenter	HC_PY_WC_RSLT_CAN_FL
PYUSA_FL	US Payroll Fluid WorkCenter	HC_PY_WC_RSLT_FL
TLWC_FL	Time and Labor Fluid WorkCenter	HC_TL_WC_RSLT_FL

3. (Enterprise Components) Set up the Work Management configuration pages in Enterprise Components.

   > **Note**
   >
   > You must be assigned the *EOXC_USER* role to access these pages.

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a. Select transactions (link IDs) you enabled in the previous steps and access the Work Management page using the Enterprise Components: Work Management Link ID's Page.

   This will take you to the Enterprise Components: Enable Work Mgmt Exception Page where you can enable transaction links and define the default follow-up days and other configuration settings.

b. (Optional) Review or modify pillar product IDs and default record groupings on the Enterprise Components: Work Mgmt Product Default Page.

c. (Optional) View or modify a pillar record group, its status, and the corresponding record and comments on the Enterprise Components: Work Mgmt Record Group Default Page.

4. (HCM) Access the Fluid WorkCenter for a product to view and manage outstanding transactions in various views.

> **Note**
>
> User's must be granted the appropriate user role to access a WorkCenter.

Work Management is implemented in the following WorkCenters:

- Benefits WorkCenters
- Canadian Payroll WorkCenters
- Global Payroll
- Time and Labor
- U.S. Payroll WorkCenters

Related Topics

- PeopleSoft Benefits Administration: Using Work Management in Benefits WorkCenter
- PeopleSoft Payroll for North America: Using Work Management in Payroll WorkCenters
- PeopleSoft Global Payroll: Using Work Management in Global Payroll WorkCenters
- PeopleSoft Time and Labor: Using Work Management in Time and Labor WorkCenters

HCM Work Management Setup Page

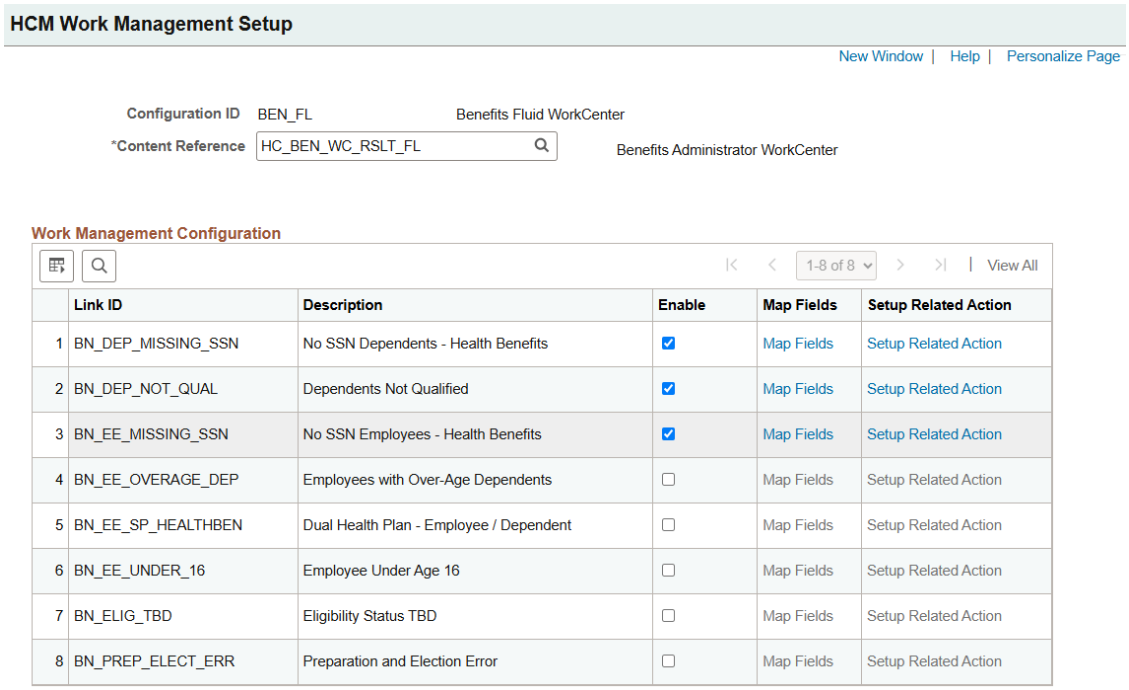
Use the HCM Work Management Setup page (HCSC_WCLNKIDMAP_WM) to identify the WorkCenter and enable Work Management for a link ID transaction.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **HCM WorkCenter Integration**, and then **HCM Work Management Setup**

This example illustrates the fields and controls on the HCM Work Management Setup page.

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This page lists all the system work link IDs associated with the configuration ID.

> **Note**
>
> After you have defined all the necessary fields for mapping and related actions, the system will automatically populate the Work Management setup records (*PS_EOXC_SETUP_HDR*, *PS_EOXC_SETUP_LN*, and *PS_EOXC_DATA_K_MAP*). Work Management for work items is enabled only when all required setup data is populated in the Work Management Setup record.

Field or Control	Description
Content Reference	Enter the product specific WorkCenter. **Note:** You must select a valid content reference to access related actions for the configuration ID.

Work Management Configuration

Field or Control	Description
Enable	Select this option to enable Work Management for a WorkCenter link ID. When you enable an ID, the **Map Fields** and **Setup Related Action** links become available for that row.
Map Fields link	Select this link to access the Map Fields Page to select the fields the Work Management framework should use to identify data rows during Work Management actions.

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Field or Control	Description
Setup Related Action link	Select this link to access the Configuring WorkCenter Related Actions Page and select which Related Action Service IDs you want to enable for Work Management. **Note:** You must enter a value in the **Content Reference** field to access related actions for the configuration ID.

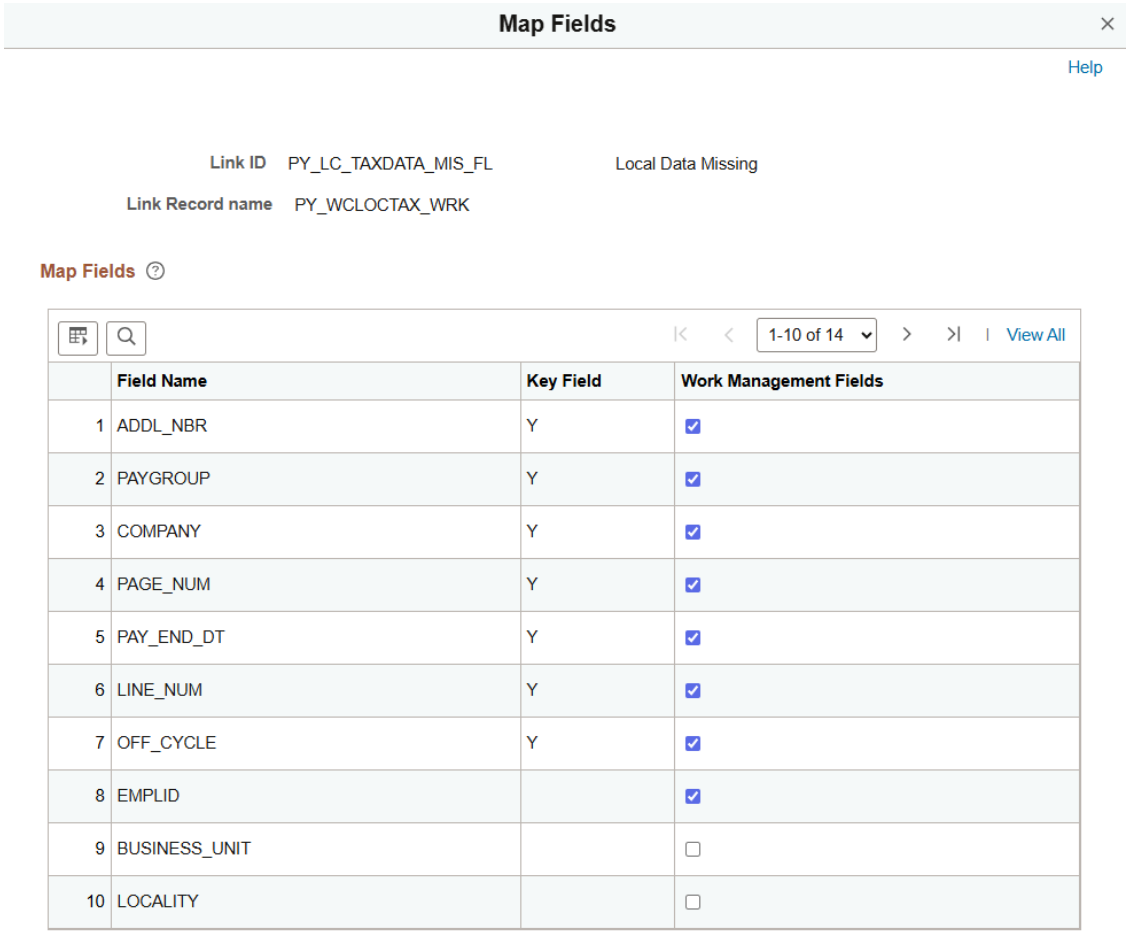
Map Fields Page

Use the Map Fields page (HCSC_WCMAPFLDS_SEC) to select fields you want to map to Work Management setup records. These fields will be used in uniquely identifying the transaction for which a Work Management Action is performed in the WorkCenter.

Navigation:

Select the **Map Fields** link for a link ID on the HCM Work Management Setup Page.

This example illustrates the fields and controls on the Map Fields page.



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This page displays all the fields in a link ID record and is used to automatically populate the two Work Management setup records: *EOXC_SETUP_HDR* and *EOXC_DATA_K_MAP*.

The Work Management framework uses the selected fields to identify data rows during work management actions by automatically mapping the fields to the relevant Work Management fields.

Field or Control	Description
Work Management Fields	Select to enable a field for Work Management. **Note:** You must select at least one field to enable Work Management. If you do not select any fields, deselect the **Enable** check box for the link ID on the HCM Work Management Setup Page.

Configuring WorkCenter Related Actions Page

Use the Configuring WorkCenter Related Actions page (HCSC_WCRELACTN_SEC) to identify which Related Action Service IDs you want to enable for Work Management.

Navigation:

Select the **Setup Related Action** link for a link ID on the HCM Work Management Setup Page.

This example illustrates the fields and controls on the Configuring WorkCenter Related Actions page.

Configuring WorkCenter Related Actions

Help

Configuration ID BEN_FL Benefits Fluid WorkCenter

Link ID BN_DEP_MISSING_SSN No SSN Dependents - Health Benefits

Configuring WorkCenter Related Actions

1-10 of 19 View All

	Related Action	Service Name	Enable
1	BN_BEN_STATEMENT	Benefits Statement	☑
2	BN_BEN_PROG	Benefit Program	☑
3	BN_ELECT_ENTRY	Election Entry	☑
4	BN_SCHED_TAB	Schedule Table	☐
5	ACA_ELIGIBILITY	ACA Eligibility	☐
6	BN_OD_EVENT_PROC	OnDemand Event Pro	☐
7	BN_PERSONAL_DATA	View Personal Data	☐
8	BN_JOB_DATA_FL	Update Job Data	☐
9	BN_LIFE_ADD	Life and AD/D	☐
10	BN_MAINT_FLAGS	Maintain Flags	☐

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This page lists all the Related Action Service IDs for the WorkCenter.

Field or Control	Description
Enable	Select to enable a related action to use Work Management.

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Working with PeopleSoft Pivot Grids

Understanding Delivered Pivot Grids

PeopleSoft Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using PSQuery data source. The framework also enables users to see different views of the data.

This information is stored in the Pivot Grid Wizard by navigating to **Reporting Tools**, and then **Pivot Grid**, and then **Pivot Grid Wizard**.

Delivered Pivot Grids

This table lists PeopleSoft-delivered Pivot Grids for HCM:

Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Absence Management	Absence Event Analysis	HGA_EVENT_ANALYSIS_MGR_DSH	PeopleSoft Absence Management: Absence Events Analysis Pagelet
Absence Management	Absence Event Analysis	HGA_EVENT_ANALYSIS_MGR	PeopleSoft Absence Management: Absence Analytics Page
Absence Management	Absence Event Analysis for ADM	HGA_EVENT_ANALYSIS_ADM	PeopleSoft Absence Management: Absence Events Analysis Pagelet
Absence Management	Abs Event Cost Analysis ADM	HGA_EVENT_COST_ADM	PeopleSoft Absence Management: Absence Cost Analysis Pagelet
	Abs Event Cost analysis MGR	HGA_EVENT_COST_MGR	
Absence Management	Abs Liability and Trends ADM	HGA_LIABILITY_TRENDS_ADM	PeopleSoft Absence Management Liability and Trends Pagelet
Absence Management	Abs Liability and Trends MGR	HGA_LIABILITY_TRENDS_MGR	PeopleSoft Absence Management: Absence Liability and Trends Pagelet
Absence Management	Leave Balances by Type	HGA_LEAVE_BAL_MGR	PeopleSoft Absence Management: Absence Cost Analysis Pagelet
Absence Management	Periodic Absence Rate ADM	HGA_PRD_RATE_ADM	PeopleSoft Absence Management: Periodic Absence Rate Pagelet

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Absence Management	Periodic Absence Rate MGR	HGA_PRD_RATE_MGR	PeopleSoft Absence Management: Periodic Absence Rate Pagelet
Compensation	Compensation by Performance	WCS_PG_COMP_PERF	PeopleSoft eCompensation Manager Desktop: Salary Increase by Performance Page PeopleSoft eCompensation Manager Desktop: Variable Compensation by Performance Page
Compensation	Compensation Distribution	WCS_PG_COUNT	PeopleSoft eCompensation Manager Desktop: Compensation Distribution Page
Compensation	Cycle Guideline Alert	WCS_PG_ALERT	PeopleSoft eCompensation Manager Desktop: Cycle Guideline Alert Page
Compensation	Cycle Tracking	WCS_PG_TRACK	PeopleSoft eCompensation Manager Desktop: Cycle Tracking Page
Compensation	Salary Analysis	WCS_PG_PEER	PeopleSoft eCompensation Manager Desktop: Salary Analysis Page
Compensation	Salary Increase by Performance	WCS_PG_SAL_PERF	PeopleSoft eCompensation Manager Desktop: Salary Increase by Performance Page
ePerformance	My Team's Performance Status	EP_PG_DOCSTS	PeopleSoft ePerformance: Team Performance Status Page
ePerformance	Team Performance Status Detail	EP_PG_DOCSTS_NUI	See PeopleSoft ePerformance: Team Performance Status Page
eProfile Manager Desktop	Current Salary Analysis	HR_TM_EC_SA	See PeopleSoft eProfile Manager Desktop: My Team Pages: Supplementary Panel
eProfile Manager Desktop	Performance Status	HR_TM_EP_DOCSTS	See PeopleSoft eProfile Manager Desktop: My Team Pages: Supplementary Panel

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
eProfile Manager Desktop	Performance vs. Compa-Ratio	HR_TM_PG	PeopleSoft eProfile Manager Desktop: Performance vs. Compa-Ratio Pivot Grid
eProfile Manager Desktop	Salary Analysis	HR_GSS_PG	PeopleSoft eCompensation Manager Desktop: Salary Analysis Page
Global Payroll	Absence by Generated PI	GP_ABS_GENPI_ANLY	PeopleSoft Absence Management: By Generated Positive Input Pagelet
Global Payroll and Absence Management	Absence by Take and Type	GP_TK_TY_ANLY	PeopleSoft Absence Management: Absence by Take and Type Pagelet
Global Payroll and Absence Management	Absences By Negative Balance	GP_ABS_NEG_BAL	PeopleSoft Absence Management: Employee with Negative Balance Pagelet
Global Payroll	Active Employees without Gross	GP_WC_ACTIVE_EMP_NOT_PAID	PeopleSoft Global Payroll: Active Employees without Gross Page
Global Payroll and Absence Management	Analyze by Paid-Unpaid Status	GP_ABS_PRTLPAID_UNPAID_ANLY	PeopleSoft Absence Management: Absence by Paid Unpaid Status Pagelet
Global Payroll	Deduction Threshold	GP_PA_DED_THRESHOLD GP_PA_DED_PAY	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Deduction Variance	GP_PA_DED_VAR GP_PA_DED_VARIANCE	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Earnings Variance	GP_PA_ERN_VAR GP_PA_ERN_VARIANCE	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Global Payroll	Earning Threshold	GP_PA_ERN_THRESHOLD GP_PA_ERN_PAY	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Gross Pay Threshold	GP_PA_GROSS_THRESHOLD GP_GROSS_PAY	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Gross Pay Variance	GP_PA_VAR_GROSS GP_PA_GROSS_PAY_VAR	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Inactive Employees with Gross	GP_WC_INACTIVE_EMP_PAID	PeopleSoft Global Payroll: Inactive Employees with Gross Page
Global Payroll	Missing Bank Account	GP_WC_INCOMPLETE_BANK	PeopleSoft Global Payroll: Missing Bank Accounts Page
Global Payroll	Net Pay Threshold	GP_PA_NET_THRESHOLD GP_PA_NETPAY	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	Net Pay Variance	GP_PA_NET_PAY_VAR GP_PA_VAR_NET	See: PeopleSoft Global Payroll: Global Payroll Analytics Page PeopleSoft Global Payroll: Global Payroll Analytics Page
Global Payroll	New Hires	GP_WC_NEWHIRE	PeopleSoft Global Payroll: New Hires Page
Global Payroll	Overtime > 10 Hours	O/T >10	
Global Payroll	Payee in Error	GP_WC_PAYROLL_ERROR_MSG	

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Global Payroll	Terminations	GP_WC_TERMINATION	PeopleSoft Global Payroll: Terminations Page
Global Payroll	Unprocessed Iterative	GP_WC_ITERATIVE_TRGR	
Global Payroll	Unprocessed Retro	GP_WC_RETRO_TRGR	
Global Payroll	Unprocessed Segmentation	GP_WC_SEGMENTATION_TRGR	
Global Payroll	View Department ID Details	GP_CS_DEPTID_ACUM GP_CS_DEPTID_GROSS GP_CS_DEPTID_NET	See PeopleSoft Absence Management: Processing Monitor - By Calendar Group Page
Global Payroll United Kingdom	Court Order	COURT ORDER	
Global Payroll United Kingdom	Pennies for Charity	GBR DD PENNS	
Human Resources	Current Headcount	HR_PG_HC_CURRNT_ADMIN	PeopleSoft Human Resources Administer Workforce: Current Headcount Pivot Grid
Human Resources	Current Headcount Profile- Mgr	HR_PG_HC_CURRNT_MGR	PeopleSoft Human Resources Administer Workforce: Headcount Movement Page
Human Resources	Diversity Analysis	HR_PG_WF_DIV_TYPE_ADM	PeopleSoft Human Resources Administer Workforce: Diversity Analysis Page
Human Resources	Diversity Overview	HR_PG_WF_DIV_ADM	PeopleSoft Human Resources Administer Workforce: Diversity Overview Page
Human Resources	Headcount Movement	HR_PG_HC_MOVMNT_ADMIN	PeopleSoft Human Resources Administer Workforce: Headcount Movement Pivot Grid
Human Resources	Headcount Movement - Manager	HR_PG_HC_MOVMNT_MGR	PeopleSoft Human Resources Administer Workforce: Headcount Movement Page
Human Resources	Highest Education Level	HR_PG_ED_LVL_ADM	PeopleSoft Human Resources Administer Workforce: Highest Education Page
Human Resources	Position Status	HR_PG_POS_STATUS_ADM	PeopleSoft Human Resources Administer Workforce: Position Status Page

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Human Resources	Workforce Turnover	HR_PG_WF_TRNOVR_ADM	PeopleSoft Human Resources Administer Workforce: Workforce Turnover Page
Payroll for North America	Comparative Checks Comparative Cheques	PY_WC_CHK_HIST_USA PY_WC_CHK_HIST_CAN	PeopleSoft Payroll for North America: Comparative Checks Pivot Grid PeopleSoft Payroll for North America: Comparative Checks Page
Payroll for North America	Comparative Deductions	PY_WC_DED_HIST_CAN PY_WC_DED_HIST_USA	PeopleSoft Payroll for North America: Comparative Deductions Pivot Grid PeopleSoft Payroll for North America: Comparative Deductions Page
Payroll for North America	Comparative Earnings	PY_WC_ERN_HIST_CAN PY_WC_ERN_HIST_USA	PeopleSoft Payroll for North America: Comparative Earnings Pivot Grid PeopleSoft Payroll for North America: Comparative Earnings Page
Payroll for North America	Deductions By Company	PY_WC_DED_COM_CAN PY_WC_DED_COM_USA	PeopleSoft Payroll for North America: Deductions By Company Pivot Grid PeopleSoft Payroll for North America: Deductions By Company Page
Payroll for North America	Deductions by Deduction Code	PY_WC_DED_DEDCD_CAN PY_WC_DED_DEDCD_USA	PeopleSoft Payroll for North America: Deductions By Deduction Code Pivot Grid PeopleSoft Payroll for North America: Deductions By Deduction Code Page

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Payroll for North America	Earnings by Company	PY_WC_ERN_COM_CAN PY_WC_ERN_COM_USA	PeopleSoft Payroll for North America: Earnings By Company Pivot Grid PeopleSoft Payroll for North America: Earnings By Company Page
Payroll for North America	Earnings by Earnings Code	PY_WC_ERN_ERNCD_CAN PY_WC_ERN_ERNCD_USA	PeopleSoft Payroll for North America: Earnings By Earnings Code Pivot Grid PeopleSoft Payroll for North America: Earnings By Earnings Code Page
Payroll for North America	Employee Check Data Employee Cheque Data	PY_WC_CHK_USA PY_WC_CHK_CAN	PeopleSoft Payroll for North America: Employee Paycheck Information Pivot Grid PeopleSoft Payroll for North America: Paycheck Information Page
Payroll for North America	Payment Option	PY_WC_PAYMENT_OPT_CAN PY_WC_PAYMENT_OPT_USA	PeopleSoft Payroll for North America: Payment Options Page PeopleSoft Payroll for North America: Payment Options Page
Talent Acquisition Manager	Application Diversity	HRS_PG_DA_APPLN HRS_PG_DA_APPLN2	PeopleSoft Talent Acquisition Manager: Applicant Diversity Overview Pivot Grid PeopleSoft Talent Acquisition Manager: Diversity By Applications Pivot Grid PeopleSoft Talent Acquisition Manager: Applications Diversity Pivot Grid
Talent Acquisition Manager	Average Time to FIll	HRS_PG_TTF_DB HRS_PG_TTF_DB_A	PeopleSoft Talent Acquisition Manager: Time to Fill Pagelet PeopleSoft Talent Acquisition Manager: Time to Fill Pivot Grid PeopleSoft Talent Acquisition Manager: Time to Fill Jobs Pivot Grid

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Talent Acquisition Manager	Diversity Overview	HRS_PG_DIV_OV1 HRS_PG_DIV_OV2 DIVERSITY OVERVIEW	PeopleSoft Talent Acquisition Manager: Applicant Diversity Overview Pivot Grid PeopleSoft Human Resources Administer Workforce: Diversity Overview Page
Talent Acquisition Manager	In Process Applicants	HRS_PG_INPRC_APPL_SA HRS_PG_INPRC_APPL	PeopleSoft Talent Acquisition Manager: In Process Applicants Pivot Grid PeopleSoft Talent Acquisition Manager: In Process Applicants Pivot Grid
Talent Acquisition Manager	Job Opening Aging Analysis	HRS_PG_JO_AGE_M HRS_PG_JO_AGE_MY_ANALYTICS HRS_PG_JO_AGE_SA HRS_PG_JO_AGE	PeopleSoft Talent Acquisition Manager: Job Opening Aging Analysis Pivot Grid PeopleSoft Talent Acquisition Manager: Job Opening Aging Pivot Grid
Talent Acquisition Manager	Job Openings Opened/ Closed JO Opened and Closed Job Opening Open/ Close	HRS_PG_JO_OC HRS_PG_JO_OC_M HRS_PG_JO_OC_SA	PeopleSoft Talent Acquisition Manager: Job Opening Open and Close Trend Pivot Grid PeopleSoft Talent Acquisition Manager: Jobs Opened/Closed Pivot Grid
Talent Acquisition Manager	JO Time to Fill JO Time to Fill JO Time to Fill - Manager JO Time to Fill - Manager Time to Fill Jobs	HRS_PG_TTF HRS_PG_TTF_A HRS_PG_TTF_M HRS_PG_TTF_M_A HRS_PG_TTF_MY_ANALYTICS	PeopleSoft Talent Acquisition Manager: Time to Fill Pivot Grid PeopleSoft Talent Acquisition Manager: Time to Fill Jobs Pivot Grid
Time and Labor	Absence Type	TL_ABST_IRPT	PeopleSoft Time and Labor: Absence Type - Absence Mgmt Pivot Grid Page
Time and Labor	Absence Types - Benefits	TL_ABST_IRPT_BC	PeopleSoft Time and Labor: Absence Types - Benefits Pivot Grid Page
Time and Labor	ACA Full/ Part Time Status	ACA_FULL_PART_TIME	PeopleSoft Time and Labor: ACA Full/Part Time Status Page

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Application / Product	Pivot Grid Title	Pivot Grid Name	Link to Product Documentation for Pivot Grids
Time and Labor	ACA Monthly Threshold	ACA_MONTHLY_RPT	PeopleSoft Time and Labor: ACA Threshold Limits Page
Time and Labor	ACA New Hire/ Rehire	ACA_HIRE_REHIRE	PeopleSoft Time and Labor: ACA New Hire/ Rehire Report Page
Time and Labor	ACA Weekly Threshold	ACA_WEEKLY_RPT	PeopleSoft Time and Labor: ACA Threshold Limits Page
Time and Labor	Attendance Violations	TL_ATTP_IRPT	PeopleSoft Time and Labor: Attendance Violations Pivot Grid Page
Time and Labor	Payable Time by Labor Costs	TL_LBR_IRPT	PeopleSoft Time and Labor: Labor Costs Page
Time and Labor	Payable Time by Status	TL_PT_STATUS_IRPT	PeopleSoft Time and Labor: Payable Time by Status Page
Time and Labor	Payable Time Trend	TL_PT_TREND_IRPT	PeopleSoft Time and Labor: Payable Time Trend Page
Time and Labor	Schedule Assign Enrollments	SCH_AENRL_PREVIEW	PeopleSoft Time and Labor: Preview Schedule Assignment Report
Time and Labor	Scheduled Enrollment Errors	SCH_AENRL_ERRORS	PeopleSoft Time and Labor: Errors Schedule Assignment Report
Time and Labor	Time and Labor Enrollments	TL_AENRL_PREVIEW	PeopleSoft Time and Labor: Preview Time and Labor Report
Time and Labor	Time Categories Comparison	TL_TIM_CAT_COMP_IRPT	PeopleSoft Time and Labor: Time Categories Comparison Page
Time and Labor	Timesheet by Status	TL_RPTD_IRPT	PeopleSoft Time and Labor: Timesheet by Status Pivot Grid Page
Time and Labor	TL Enrollment Errors	TL_AENRL_ERRORS	PeopleSoft Time and Labor: Errors Time and Labor Report
Time and Labor	TL Time Status Pivot Grid	TL_TIME_STATUS_IRPT	PeopleSoft Time and Labor: Payable Time by Status PagePeopleSoft Time and Labor: Timesheet by Status Pivot Grid Page
Time and Labor	Workforce Analytics	TL_WFA_DEPT_HRS	

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Understanding and Setting Up Classic Plus Pages for HCM

Understanding Classic Plus Setup for HCM

PeopleSoft Classic Plus feature provides you the ability to view the Classic components with fluid-like styling. Classic Plus styling is enabled on most of the application Classic Components.

Using the Classic Plus Setup page, System Administrators can quickly view the list of application components delivered as Classic Plus and enable/disable Classic Plus styling for multiple application Classic Components.

For more information on Classic Plus components and styling options, see the following PeopleTools documentation:

- PeopleTools: PeopleTools Components Delivered as Classic Plus
- PeopleTools: Configuring Branding System Options

Related Topics

- Setting Up Classic Plus for HCM
  This section discusses on how to manage Classic Plus branding for application Classic components.

Setting Up Classic Plus for HCM

This section discusses on how to manage Classic Plus branding for application Classic components.

Page Used to Set Up Classic Plus for HCM

Page Name	Definition Name	Usage
Classic Plus Setup Page	EOCP_SETUP	View the list of application components delivered with Classic Plus style and also enable/disable Classic Plus styling for classic components.

Classic Plus Setup Page

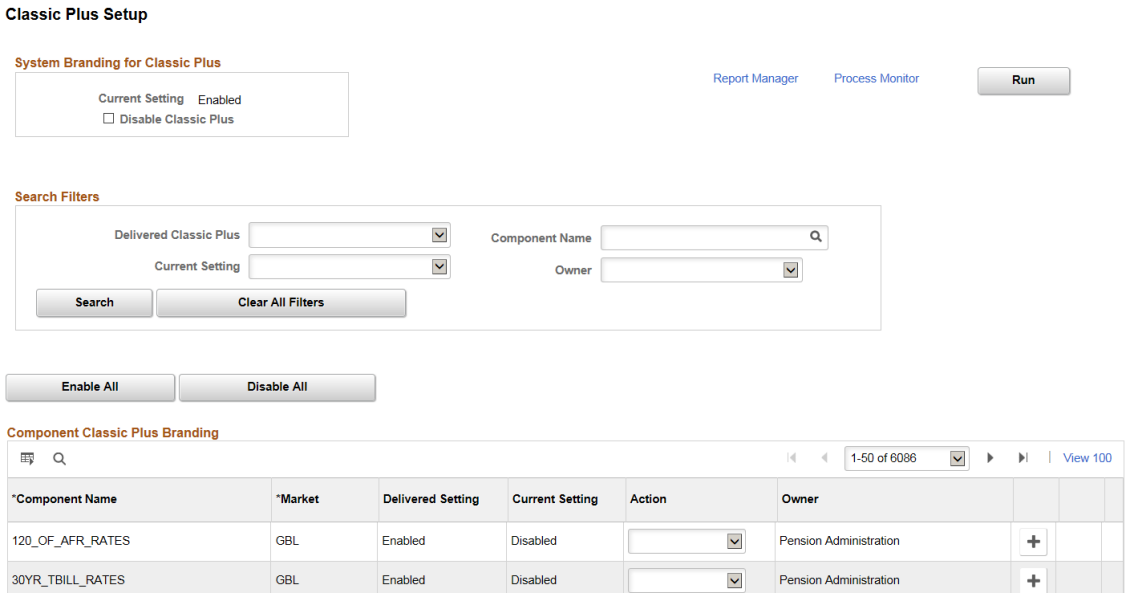
Use the Classic Plus Setup page (EOCP_SETUP) to enable/disable Classic Plus feature in Classic components. You can also view the list of application components delivered as Classic Plus using this page.

Navigation:

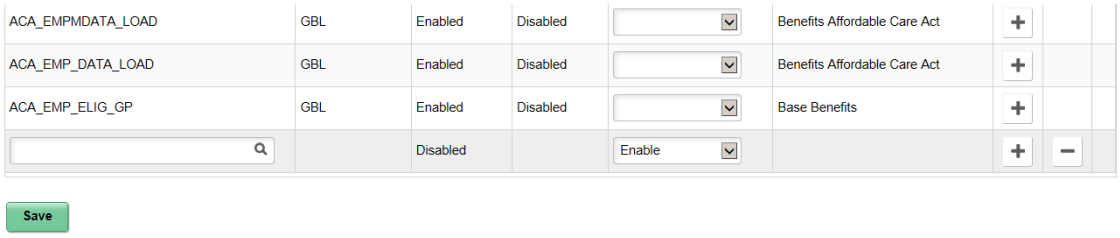
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Enterprise Components, and then **Common Utilities**, and then **Classic Plus Setup**

This example illustrates the fields and controls on the Classic Plus Setup page (1 of 2).



This example illustrates the fields and controls on the Classic Plus Setup page (2 of 2).



System Branding for Classic Plus

Field or Control	Description
Current Settings	Displays the current Classic Plus configuration status at system level (as given in the Branding System Options page). If the value in 'Theme Style Type' field is selected as "Fluid like theme for Classic" in PT Branding System Option page, then the current setting is displayed as *Enabled*, else the status will be displayed as *Disabled*.
Disable Classic Plus/ Enable Classic Plus	Select this option to disable/enable the Classic Plus feature at the system level. **Note:** This field will be displayed based on the current system settings. For example, if the Classic Plus feature is enabled at system level, the field appears as 'Disable Classic Plus'.

Search Filters

Use the search option to filter the components using the following fields.

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Field or Control	Description
Delivered Classic Plus	Select *Enable* to have the system display all the delivered Classic Plus components.
Component Name	Select the required component to be displayed.
Current Setting	Opt to filter and display all the Class Plus enabled/disabled components.
Owner	Filter and display the components based on the PeopleSoft Application to which it belongs. For example, Base Benefits.
Enable All	Use this button to enable Classic Plus feature on all the components in the current grid results.
Disable All	Use this button to disable Classic Plus feature on all the components in the current grid results.

Component Classic Plus Branding

In the Component List grid, users can view or add components that they would want classic plus enabled or disabled.

Use the Add button to insert a new row in the grid. You can also delete the data that you have entered.

Field or Control	Description
Component Name	Displays the name of the classic component. **Note:** If you are adding data, select the classic component to be edited.
Market	Displays the market based on the selected component.
Delivered Setting	Indicates whether HCM has enabled classic plus styling for the delivered component or not. **Note:** The field will not be set for custom components and the status appears as 'Disabled'.
Current Setting	Displays the current setting for the component.
Action	Select the action as *Enable* if you want to enable Classic Plus for a component. Select action as **Disable**to disable Classic Plus for the component. If no change required, this field should be left blank
Owner	Displays the owner of the component.

Once the Actions are specified, the component should be saved and the Application Engine process associated with this component should be run.

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Working with the Self-Service Reporting Framework

Understanding the Self-Service Reporting Framework

It is inefficient for administrators to take on the responsibility of generating and manually distributing statutory reports for all employees. The Self-Service Reporting Framework enables administrators to provide employees with the ability to generate statutory reports through self-service.

The flexibility of this framework enables administrators to:

- Create report groups to categorize similar kind of reports.
- Control the display of reports on the self-service pagelet based on statutory and company requirements.
- Configure reports under various available report templates, which provide filter parameters that employees can select when they generate reports.
- Define and control report filters dynamically based on the existing BI Publisher report queries.

Employees access the enabled reports through a new Self Service Reports pagelet on their home page. They can enter parameters for the reports, generate them, and save them to their local drives.

Setting Up the Self-Service Reporting Framework

These topics discuss how to set up the self-service reporting framework.

Pages Used to Set Up the Self Service Reporting Framework

Page Name	Definition Name	Usage
Group Setup Page	HCSC_SS_RPT_GROUP	Define a group that you can use to map a cluster of reports to a country.
Enable Self-Service Reports Page	HCSC_SS_RPT_CNTL	Create report IDs for the reports you want to be available through self-service.
Configure Self-Service Reports Page	HCSC_SS_RPT_CNFG	Map existing reports developed in BI Publisher to report IDs.
Define Report Filters Page	HCSC_SS_RPT_FILTER	Define the parameters that employees can set when they generate self-service reports.
Filter Field Values Page	HCSC_SS_RPTFLT_VAL	Define the field values for a report filter.

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Page Name	Definition Name	Usage
Refresh Report Security Page	HCSC_SS_RPT_SEC_RC	Update the Report Security Table.

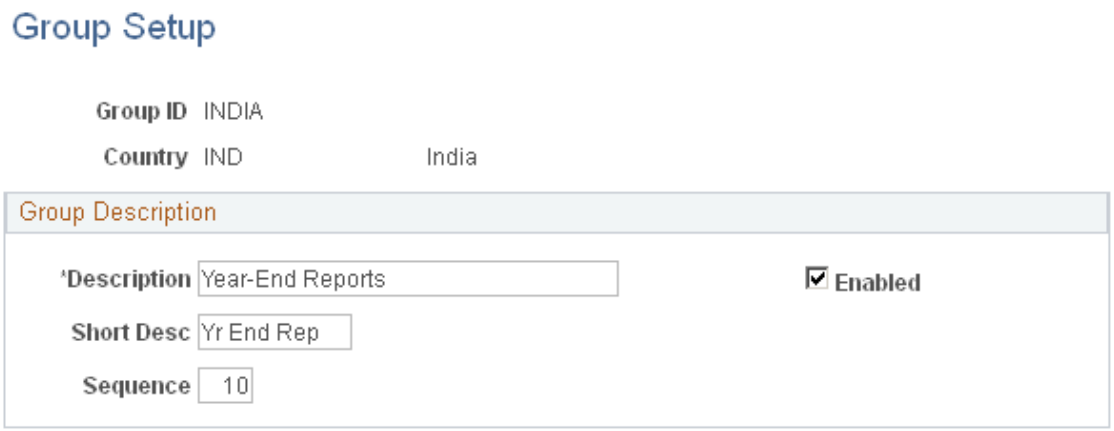
Group Setup Page

Use the Group Setup page (HCSC_SS_RPT_GROUP) to define a group that you can use to map a cluster of reports to a country.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Self-Service Report Groups**

This example illustrates the fields and controls on the Group Setup page.



Field or Control	Description
Description	Enter a description for the report group. This description appears as a folder name in the Self-Service Reports pagelet.
Short Desc (short description)	Enter a short description for the report group.
Sequence	Enter a sequence for the report group. This field determines the order in which the report group appears in the Self-Service Reports pagelet if there are multiple report groups.
Enabled	Select to activate the report group. Deselect this check box to deactivate the report group.

Enable Self-Service Reports Page

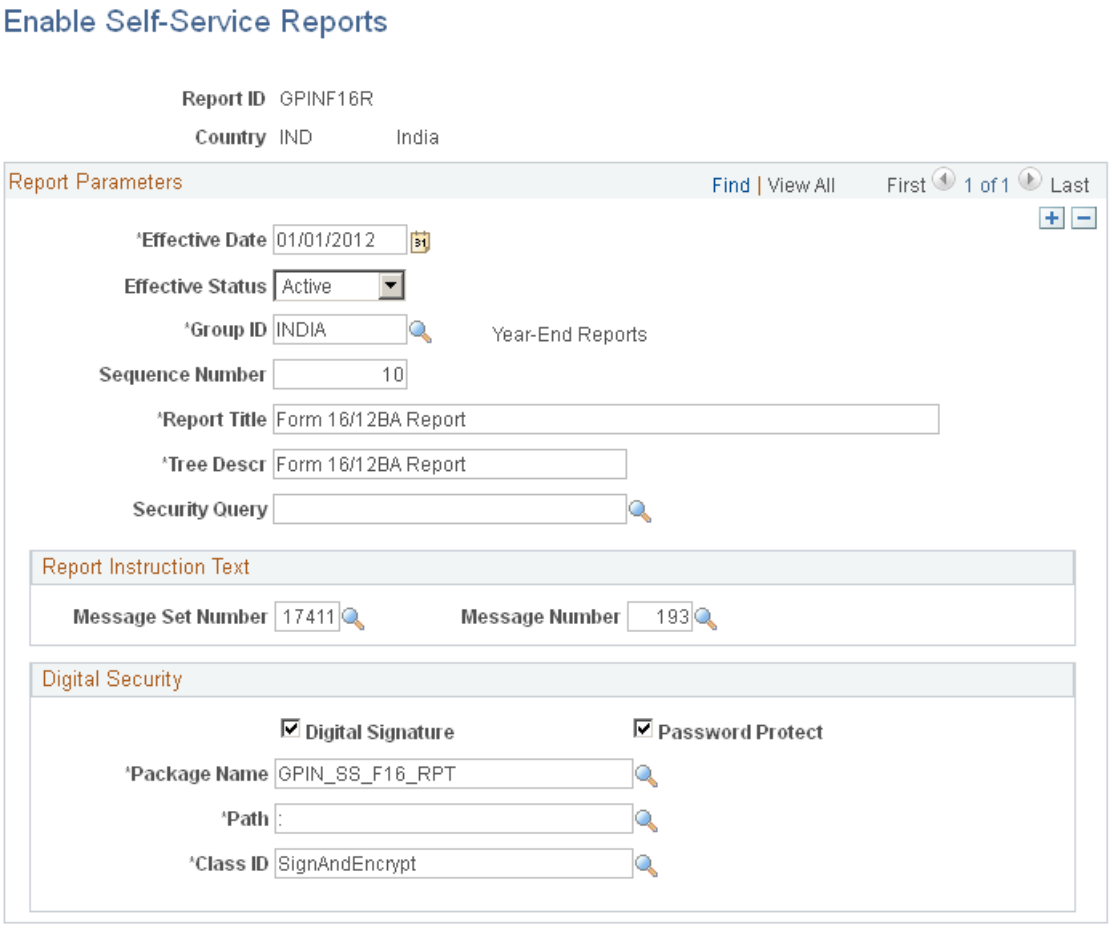
Use the Enable Self-Service Reports page (HCSC_SS_RPT_CNTL) to create report IDs for the reports you want to be available through self-service.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Enable Self-Service Reports**

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This example illustrates the fields and controls on the Enable Self-Service Reports page.



Report Parameters

Field or Control	Description
Effective Date and **Effective Status**	Enter the effective date and status of the report ID.
Group ID	Enter the ID of the report group to which you want to map the report.
Sequence Number	Enter a sequence number for the report. This field determines the order in which the reports appear within the report group if there are multiple reports.
Report Title	Enter a title for the report.
Tree Descr (tree description)	Enter the description that you want to appear for the report in the Self-Service Reports pagelet.

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Field or Control	Description
Security Query	If you want to restrict self-service generation of the report to a specific set of users you can define a query with the desired criteria and enter the query in this field. You can create a security query based on employee or role. The query should return two columns: Value Indicator and the corresponding Value. For employee-based queries, the columns returned should be EMPLID and <employee ID value>. For role-based queries, the columns returned should be ROLENAME and <rolename>. **Note:** These queries must be public. For more information on defining queries, see the product documentation for *PeopleTools: Query*.

Report Instruction Text

Field or Control	Description
Message Set Number and **Message Number**	Enter Message Set Number and Message Number for the instructional text you want to appear on the Statutory Reports page when the employee generates the report.

Digital Security

Field or Control	Description
Digital Signature	Click to require a digital signature for the PDF document that the report generates.
Password Protect	Click to require a digital password for the PDF document that the report generates.
Sequence Number, **Path**, and **Class ID**	Enter the name, path, and class ID of the application package used to sign and encrypt the PDF document generated by the report. **Note:** PeopleSoft delivers the base application package, HCSC_SS_PDFSIGN. Your implementation team must import this base application package into their custom application package to implement security.

Configure Self-Service Reports Page

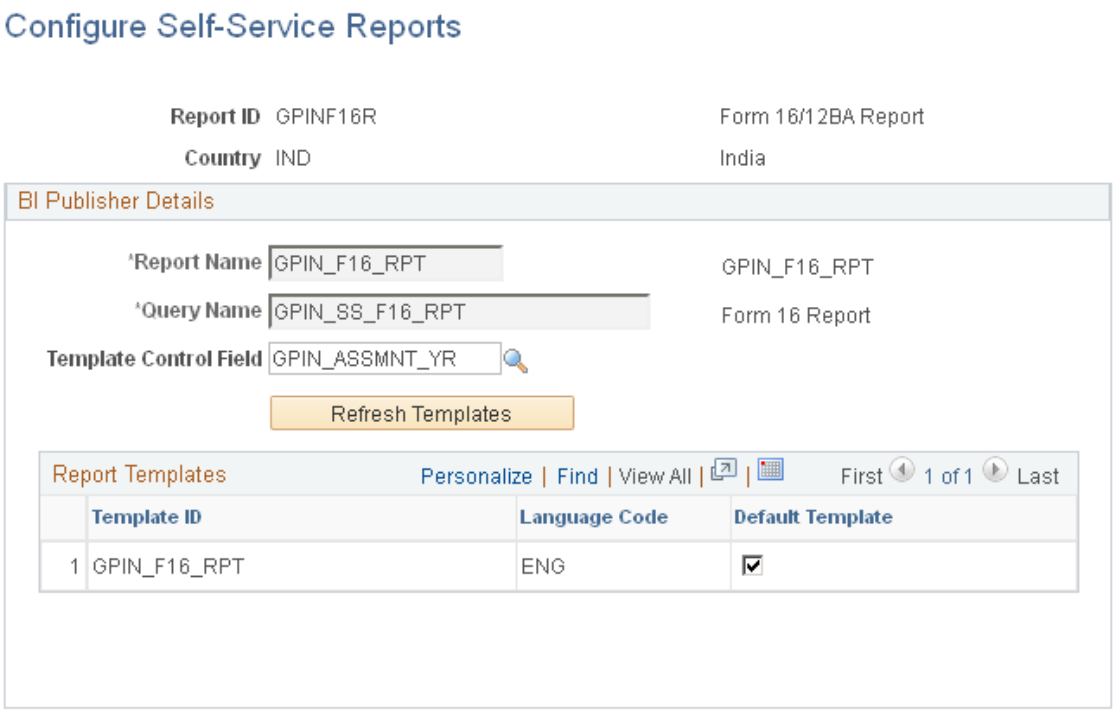
Use the Configure Self-Service Reports page (HCSC_SS_RPT_CNFG) to map existing reports developed in BI Publisher to report IDs.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Configure Self-Service Reports**

This example illustrates the fields and controls on the Configure Self-Service Reports page.

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BI Publisher Details

Field or Control	Description
Report Name	Select the name of the BI Publisher report that you want to map to the report ID.
Query Name	If the data source of the report you selected in the **Report Name** field is a query, the system populates the Query Name field with the PS query name. If the data source of the selected report is XML, then you must select the PS query name in this field. **Note:** The source queries must be public. The value in this field controls the report filter fields that may be available when an employee generates the self-service reports. **Note:** The Self-Service Reporting Framework does not currently support BI Publisher reports that use a Connected Query as a data source.
Template Control Field	Select the data source query prompt field name that you want to control the templates that the system uses to generate report output.

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Field or Control	Description
Refresh Templates	Click to populate the **Report Templates** grid with all of the templates defined for the report that you selected in the **Report Name** field. **Note:** If changes have been made to the templates defined for a report after the last time this page was saved, then the next time you access the page for that report, you will receive a message prompting you to click the Refresh Templates button to update the Report Templates grid.

Report Templates

When you click the **Refresh Templates** button, the system populates this grids with the templates defined for the selected report.

Field or Control	Description
Default Template	Select for a template to establish it as the default template for the report. You must select one default template for each template language available if the report includes multiple templates.

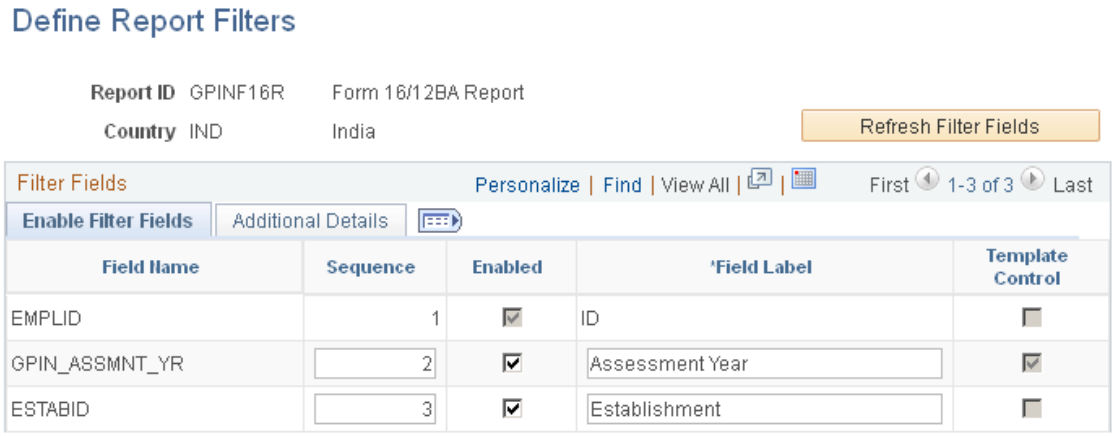
Define Report Filters Page

Use the Define Report Filters page (HCSC_SS_RPT_FILTER) to define the parameters that employees can set when they generate self-service reports.

Navigation:

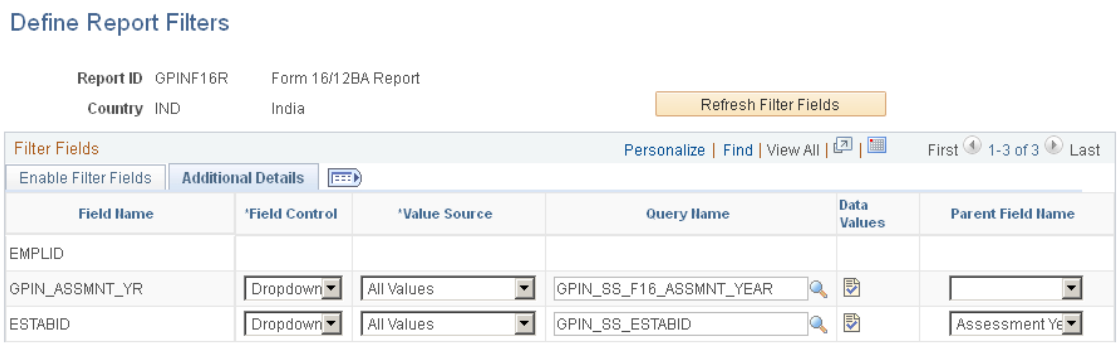
Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Self-Service Report Filters**, and then **Define Report Filters**

This example illustrate the fields and controls on the Define Report Filters page.



This example illustrate the fields and controls on the Define Report Filters page.

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Field or Control	Description
Refresh Filter Fields	Click to update the **Filter Fields** grid with the filter fields that are currently associated with the query selected for the report.

Enable Filter Fields Tab

Field or Control	Description
Field Name	Lists the names of the fields associated with the query.
Sequence	Enter sequence numbers to determine the order in which the fields appear when an employee is selecting parameters for the report.
Enabled	Select to make a field available as a report parameter that employees can define.
Field Label	Enter a label for the report parameter.
Template Control	Indicates that a field was defined as a template control field on the Configure Self-Service Reports page. When this check box is selected, it provides the administrator the flexibility to define report templates for each value under the list of values for that particular filter field.

Additional Details Tab

Field or Control	Description
Field Control	Establish how this field is controlled when employees define the parameter. Values are: *Dropdown, Prompt,* and *As of Date.*

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Field or Control	Description
Value Source	Select the source of the available values for the report parameter. Values are: • *Adhoc Values:* Values are defined by the administrator on the Filter Field Values page. • *All Values:* The system includes all available field values from the query.If you select *All Values*, the Refresh Report Security process refreshes all of the field values for the report. This reduces the amount of administrative maintenance required for the report. See the product documentation for theRefresh Report Security Page. • *Query:* You select the field values from among the query's available field values.
Query Name	Select the report filter query that determines the possible field values. This field is available only if you select *All Values* or *Query* in the **Value Source** field. **Note:** The report filter query you select must be public.
	Click to access the Filter Field Values Page where you can define the field values for a report filter.
Parent Field Name	Enter the name of the parent field on which this field's values are dependent. When an employee selects a value for the parent field, it filters the values of the child field based on that selection.

Filter Field Values Page

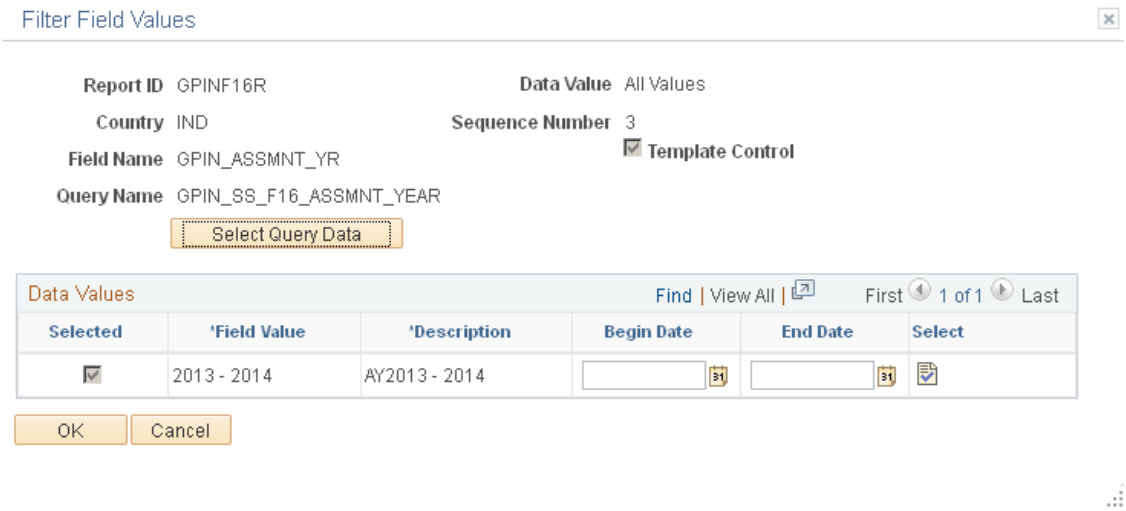
Use the Filter Field Values page (HCSC_SS_RPTFLT_VAL) to define the field values for a report filter.

Navigation:

Select the Data Values icon of a row in the Additional Details tab of the Define Report Filters Page.

This example illustrates the fields and controls on the Filter Field Values page.

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Note

The fields that appear and are available on this page depend on the value you select in the **Value Source** field on the Define Report Filters page.

Field or Control	Description
Template Control	Indicates that the field was defined as a template control field on the Configure Self-Service Reports page.
Select Query Data	Click to populate the grid with all of the possible values for the field.
Selected	Select the check box next to the field values that you want available for the report filter. If you selected *All Values* in the **Value Source** field, all of the field values are selected.
Field Value	Enter the field value for the report filter. You can edit this field only if you selected *Adhoc* in the **Value Source** field.
Description	Enter a description of the field value. This is the value that the employee sees when selecting the report parameter.
Begin Date and **End Date**	Select the date range for which the report template is effective. These fields are available only for report filter fields with **Template Control** selected.
	Click to access the Templates by filter Values page where you can select the template ID you want to use for the report filter.
Select All	Click to select the **Selected** check box for all field values in the grid.
Deselect All	Click to deselect the **Selected** check box for all field values in the grid.

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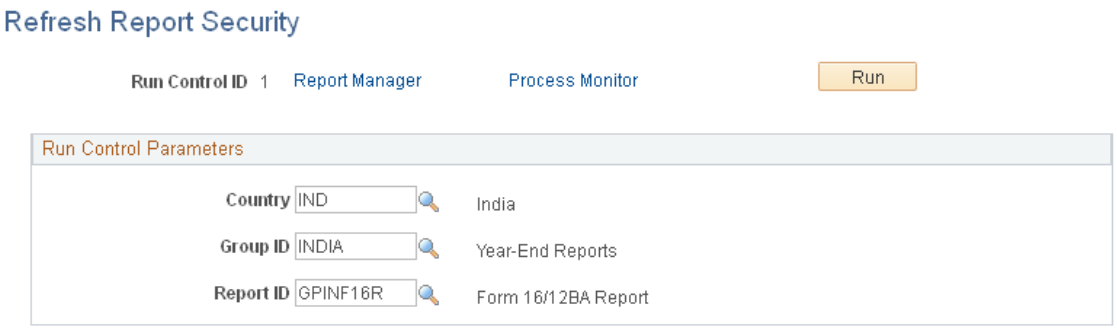
Refresh Report Security Page

Use the Refresh Report Security page (HCSC_SS_ SEC_RC) to update the Report Security Table.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Self-Service Report Framework**, and then **Self-Service Report Security**, and then **Refresh Report Security**

This example illustrates the fields and controls on the Refresh Report Security page.



By default, a report is enabled for all users whose primary permission list country matches the country defined for the report ID on the Enable Self-Service Reports Page. You can also filter the users who are able to run the report by defining a security query for the report ID. The Refresh Report Security (HCSC_RPTSEC) Application Engine (AE) process loads all of the security information for each report ID into a Report Security Table. It is recommended that you run this process daily to ensure the correct employee access to your reports.

Field or Control	Description
Country	Select a country to run the report for a specific country. If you leave this field blank, the process runs for all countries.
Group ID	Enter a value to run the report for a specific group ID. If you leave this field blank, the process runs for all group IDs associated with the selected country. You can enter a value in this field only if you select a value in the Country field.
Report ID	Enter a value to run the report for a specific report ID. If you leave this field blank, the process runs for all report IDs associated with the selected group ID. You can enter a value in this field only if you select a value in the Group ID field.

Generating and Viewing Self-Service Reports

The Self-Service Reports pagelet appears for employees on their home page. The landing page used in the pagelet to display the tree is HCSC_SS_RPT_LNDTRE.

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This is an example of the Self Service Reports pagelet.



> **Note**
>
> These report pages have been replaced by equivalent pages in Fluid. For more information, see PeopleSoft Global Payroll: Using the PeopleSoft Fluid User Interface to View Payroll Reports.

Each folder in this pagelet represents a report group. If you expand the report group, you can see all of the reports that are enabled for the employee to generate. Click a link for a self-service report to access the Statutory Reports page where you can enter parameters for the report and generate it.

Page Used to Generate and View Self-Service Reports

Page Name	Definition Name	Usage
Statutory Reports Page	HCSC_SS_RPT	Generate a self-service statutory report.

Statutory Reports Page

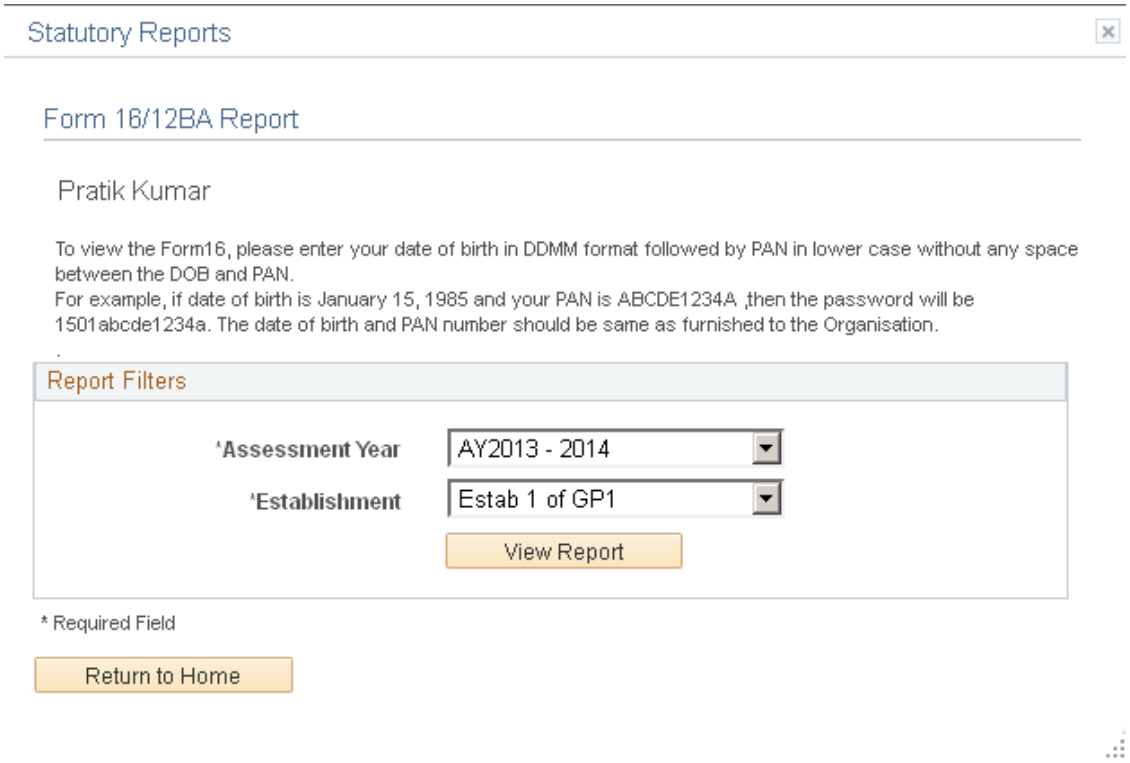
Use the Statutory Reports page (HCSC_SS_RPT) to generate a self-service statutory report.

Navigation:

Click a self-service report link in the Self-Service Reports pagelet.

This example illustrates the fields and controls on the Statutory Reports page.

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The instructions that appear on this page are defined on the Enable Self-Service Reports Page.

Report Filters

Select any report parameters that are available for you to define. The fields that appear in this group box are defined on the Define Report Filters Page.

Click the **View Report** button to generate the report. The report generates a PDF document in a separate window of your browser.

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Working with Guided Processes

Understanding the Guided Process Framework

The Guided Process framework leverages PeopleTools Activity Guide technology, which enables you to define a series of actions or steps that users complete within a specific business process through a workcenter. For more information about activity guides, see the product documentation for *PeopleTools: Portal Technology*.

The Guided Process framework provides a simplified way to configure and implement activity guides and it has its own distinct table structure, components, and pages:

- The Define Guided Process Template component (GDP_TEMPLATE_TBL) enables you to create and modify guided processes.

  > **Note**
  >
  > When you create a guided process template, the system also creates a PeopleTools activity guide template using the PeopleTools Activity Guide application process integration (API).

- The Guided Process Clone Utility component (GDP_CLONE) enables you to clone existing guided processes that you can then reconfigure for a different business process.
- The Guided Process Summary pagelet (GDP_SUMMARY_PGLT) enables you to start new guided processes, continue existing guided processes, and view information about existing guided process instances. Users access this pagelet through dashboards to which it has been added.
- The Select Guided Process component (GDP_SELECT_PRCS) also enables you to start and continue guided processes.

  > **Note**
  >
  > You can use this component only for guided processes that have OPRID as the only context key field.

Related Topics

- Setting Up Guided Processes
  Create and update guided processes using the pages of the Define Guided Process Template component (GDP_TEMPLATE_TBL).
- Cloning Guided Processes
  The Guided Process Clone Utility component (GDP_CLONE) enables you to easily copy and modify an existing guided process. By cloning a guided process template, you can reconfigure the existing parameters to suit a different business process without having to spend time building a new guided process template from the ground up.

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- Running Guided Processes

Setting Up Guided Processes

Create and update guided processes using the pages of the Define Guided Process Template component (GDP_TEMPLATE_TBL).

Pages Used to Set Up Guided Processes

Page Name	Definition Name	Usage
Define Guided Process - General Page	GDP_TMPL_GNRL	Define general information for a guided process template.
Define Guided Process - Properties Page	GDP_TMPL_PROP	Define the navigation buttons, member privileges, and context data for a guided process template.
View Button Message Page	GDP_TMPL_BTN_MSG	View and update the message that the system displays when a user clicks a navigation button.
Define Guided Process - Action Items Page	GDP_TMPL_ITEMS	Define the steps in the guided process where the user is expected to perform an action.
Edit Action Properties Page	GDP_TMPL_ACTN_PROP	Define the properties for an action item including the related content service associated with the action item.
Edit Action Post Processing Page	GDP_TMPL_ACTN_APKG	Define any post processing that occurs when an action step is saved.
Edit Action Question Page	GDP_TMPL_ACTN_QSTN	Create a yes or no question that the user answers to determine whether or not the action item should be included in the guided process.
Edit Action Data Page	GDP_TMPL_ACTN_DATA	Define data for an action item.
Edit Action Dependencies Page	GDP_TMPL_ACTN_DEP	Define dependencies for an action item.
Edit Action Page Text Page	GDP_TMPL_ACTN_PGT	Define the page text for an action item.
Define Guided Process - View Summary Page	GDP_TMPL_ITEMS_VW	View a display of all the action item configurations for a guided process template.

Define Guided Process - General Page

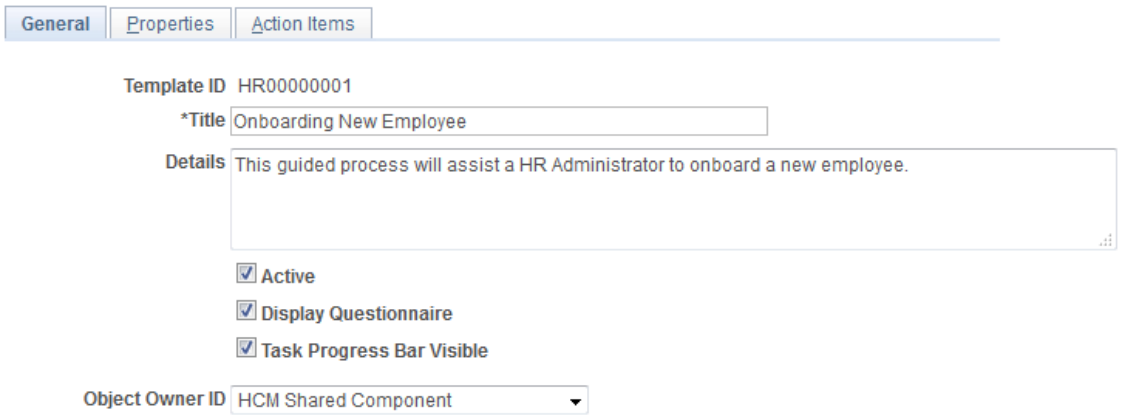
Use the Define Guided Process - General page (GDP_TMPL_GNRL) to define general information for a guided process template.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Guided Process**, and then **Define Guided Process Template**

This example illustrates the fields and controls on the Define Guided Process - General page.



Field or Control	Description
Template ID	Displays the unique ID of the guided process template. You define this ID when you add a new template.
Title	Enter a title for the guided process.
Details	Enter a description of what the guided process accomplishes.
Active	Select to activate the guided process. Only active guided processes are available to run.
Display Questionnaire	Select to display the Guided Process Questionnaire when a user initiates the guided process.
Task Progress Bar Visible	Select to display the task progress bar at the top of the pagelet area of the Guided Process Workcenter.
Object Owner ID	Select the owner of the guided process. The owner ID helps determine the team that created or modified the object. You can define unique owner IDs for your organization by entering field translate values for the OBJECTOWNERID field using PeopleSoft Application Designer. For more information about object owner IDs, see the product documentation for *PeopleTools: Application Designer Developer's Guide*.

Define Guided Process - Properties Page

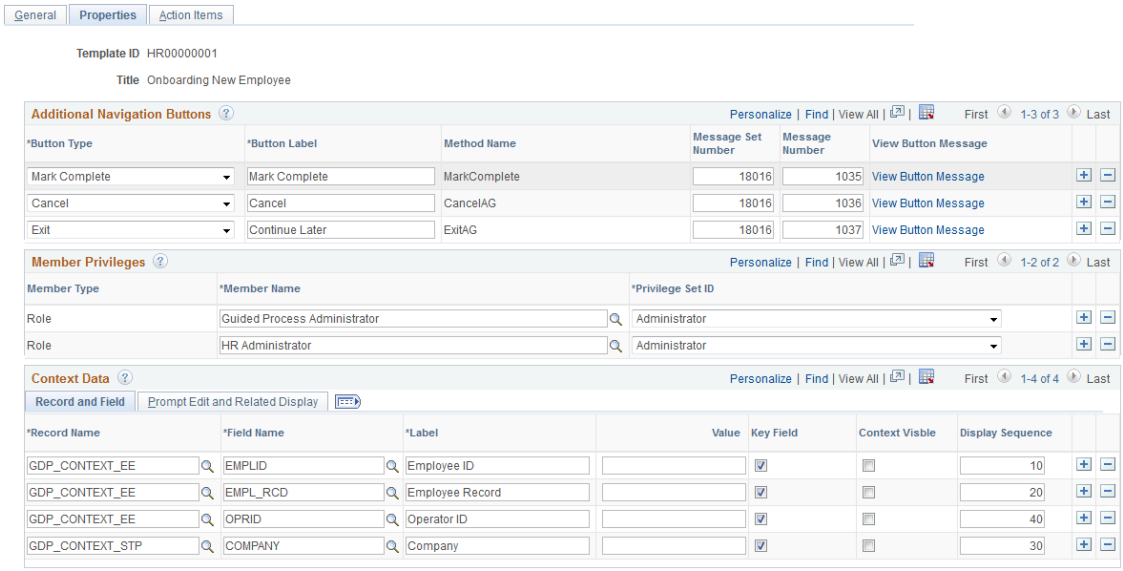
Use the Define Guided Process - Properties page (GDP_TMPL_PROP) to define the navigation buttons, member privileges, and context data for a guided process template.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Guided Process**, and then **Define Guided Process Template**, and then **Properties**

This example illustrates the fields and controls on the Define Guided Process - Properties page.



Additional Navigation Buttons

Specify the additional navigation buttons that appear next to the Previous and Next buttons in the navigation subpage area of the Guided Process Workcenter.

Field or Control	Description
Button Type	Select the type of button you want to add. Values are: • Mark Complete • Cancel • Exit **Note:** When you select a button type, the system populates the **Button Label**, **Message Set Number**, and **Message Number** fields with the default values associated with that button type. You can edit these default values.
Button Label	Enter the label for the navigation button.
Method Name	Displays the method that contains the logic that the system executes for the navigation button.
Message Set Number and **Message Number**	Enter the set and message number of the message you want associated with the navigation button.
View Button Message	Click to access the View Button Message Page where you can

Member Privileges

Define which user roles have access to the guided process and what type of access they have.

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Field or Control	Description
Member Name	Enter the user role to which you want to grant member privileges.
Privilege Set ID	Select the level of member privileges you want the user role to have. Values are: • *Administrator:* Enables users with the selected role to create and edit guided process templates, and start and delete instances of guided processes. **Note:** Before you can save a guided process template, you must assign the *Administrator* privilege to at least one user role. • *Contributor:* Enables users with the selected role to start and delete instance of the guided processes. • *Viewer:* Enables users with the selected role to view guided process templates only. They cannot edit them.

Context Data: Record and Field Tab

Use the fields in this tab to define the context key fields that the system uses to uniquely identify a guided process instance. You must designate the unique fields as keys.

> **Note**
>
> You can define a maximum of five context key fields for a guided process template.

Field or Control	Description
Record Name	Enter the record name for the context data.
Field Name	Enter the field name for the context data.
Label	Enter the label that the system displays for the context record and field.
Value	Enter a static value for the context record and field.
Key Field	Select to indicate that the context record and field are keys that the system uses to uniquely identify instances generated using the guided process template.
Context Visible	Select to make the context record, field, and value visible in the pagelet area of the guided process workcenter.
Display Sequence	Enter a value to determine the order in which the fields appear on the Start Guided Process page if they are set up as prompts in which the user enters guided process parameters.

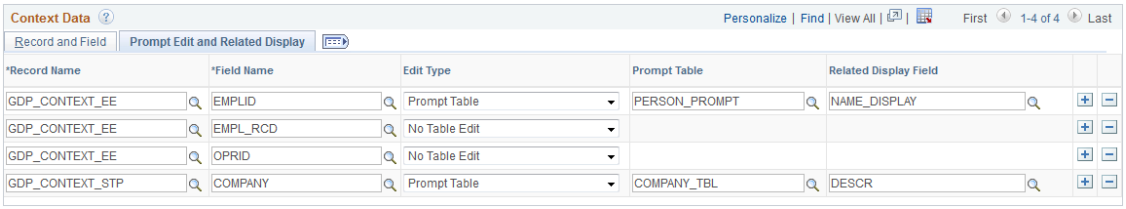
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Context Data: Prompt Edit and Related Display Tab

Use the fields in this tab to define how the system uses context data to prompt users to enter parameters for a guided process.

> **Note**
>
> Not all context fields listed in this grid prompt users for a value at the beginning of a guided process. For example, OPRID is already determined by the user's login credentials, so the system already has an established value for that context field.

This example illustrates the fields and controls on the Context Data: Prompt Edit and Related Display tab.



Field or Control	Description
Edit Type	Select the type of edit that the system uses to determine valid values for the context field. Values are: • *Prompt Table:* Select to have users select a field value from a prompt table. When you select this value, you must enter values in the **Prompt Table** and **Related Display Field**. • *Translate Value:* Select to have users select a field value from a defined list of translate values. • *Yes/No:* Select to have users select a value of *Yes* or *No* for the context field. • *No Table Edit:* Select to have no defined valid values for the context field.
Prompt Table	Enter the prompt table from which users select a context field value.
Related Display Field	Enter the field that the system uses to determine the displayed description for the valid value selected from the prompt table.

View Button Message Page

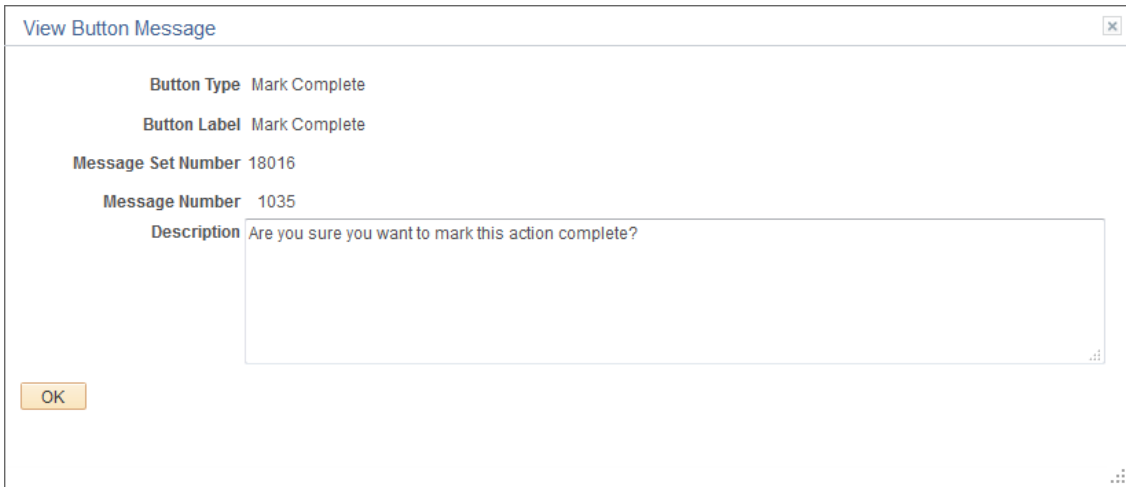
Use the View Button Message page (GDP_TMPL_BTN_MSG) to view and update the message that the system displays when a user clicks a navigation button.

Navigation:

Click the View Button Message link on the Define Guided Process - Properties page.

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This example illustrates the fields and controls on the View Button Message page.



Field or Control	Description
Description	Edit the message that the system displays when a user clicks the associated navigation button.

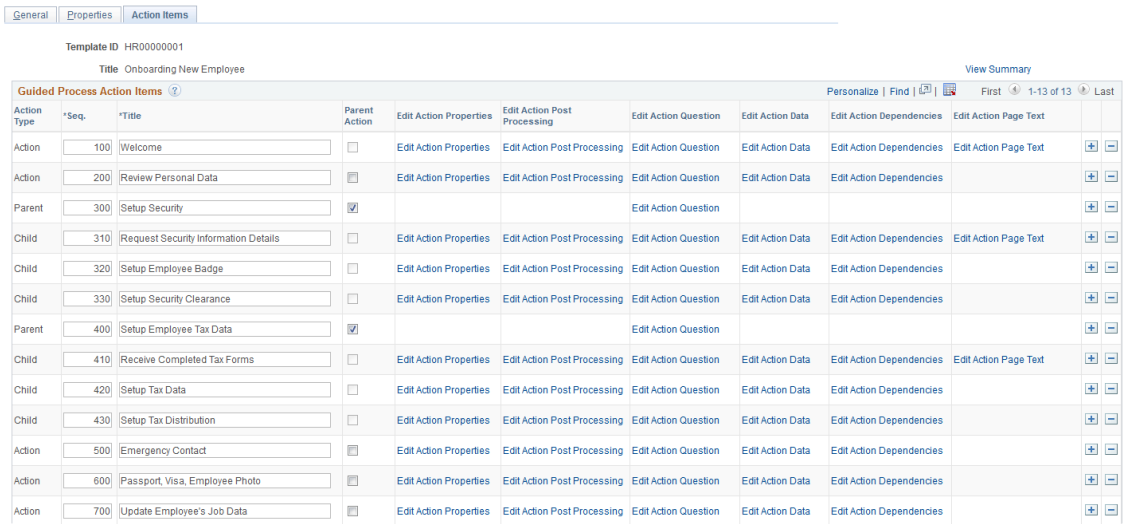
Define Guided Process - Action Items Page

Use the Define Guided Process - Action Items page (GDP_TMPL_ITEMS) to define the steps in the guided process where the user is expected to perform an action.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Guided Process**, and then **Define Guided Process Template**, and then **Action Items**

This example illustrates the fields and controls on the Define Guided Process - Action Items page.



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Field or Control	Description
Action Type	Displays the type of action item. Valid values are: • *Action:* This is the default action type. • *Parent:* Indicates that the action type is a parent of grouped child actions. When you select the **Parent Action** check box for an action item, its action type becomes *Parent*. • *Child:* Indicates that the action type is a part of a group of actions under parent action. When you select a Parent Action for an action item on the Edit Action Properties Page, its action type becomes *Child.*
Sequence	Enter a number to determine the order of the action item in the guided process.
Title	Enter a descriptive title for the action item.
Parent Action	Select to designate an action item as a parent action under which child actions are grouped. When you select this check box, the action type of the action item becomes *Parent*. Additionally, the **Edit Action Properties**, **Edit Action Post Processing**, **Edit Action Data**, and **Edit Action Dependencies** links become unavailable for the action type.
Edit Action Properties	Click to access the Edit Action Properties Page for an action item.
Edit Action Post Processing	Click to access the Edit Action Post Processing Page for an action item.
Edit Action Question	Click to access the Edit Action Question Page for an action item.
Edit Action Data	Click to access the Edit Action Data Page for an action item.
Edit Action Dependencies	Click to access the Edit Action Dependencies Page for an action item.
Edit Action Page Text	Click to access theEdit Action Page Text Page for an action item. **Note:** This link is available for an action item only if the service ID for its related content service is defined as GDP_WELCOME or GDP_INFO on the Edit Action Properties Page.

Edit Action Properties Page

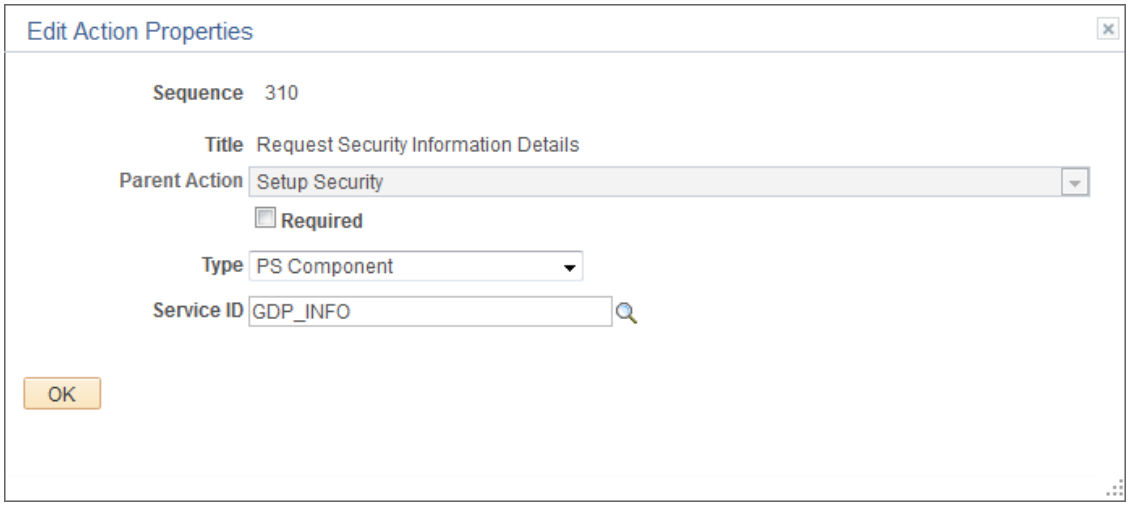
Use the Edit Action Properties page (GDP_TMPL_ACTN_PROP) to define the properties for an action item including the related content service associated with the action item.

Navigation:

Click the Edit Action Properties link on the Define Guided Process - Action Items page.

This example illustrates the fields and controls on the Edit Action Properties page.

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Field or Control	Description
Parent Action	For child actions, select the parent action to which you want to associate it. **Note:** Once you save a guided process template, this field becomes unavailable to edit for all child actions. If you want to change this value for a child action after saving the template, you have to delete the child action and insert a new one to replace it.
Required	Select to make the action item required in the guided process.
Type	Select the type of related content service you want to associate with the action item. Valid values are: • App Class • Manual • Non PeopleSoft URL • PS Component • PS Query • PS Script For more information on related content services, see the product documentation for *PeopleTools: Portal Technology*.
Service ID	Enter the ID of the related content service that you want to associate with the action item. For example, if you select *PS Component* in the **Type** field, use this field to enter the object ID of the component you want users to access for the action type.

Edit Action Post Processing Page

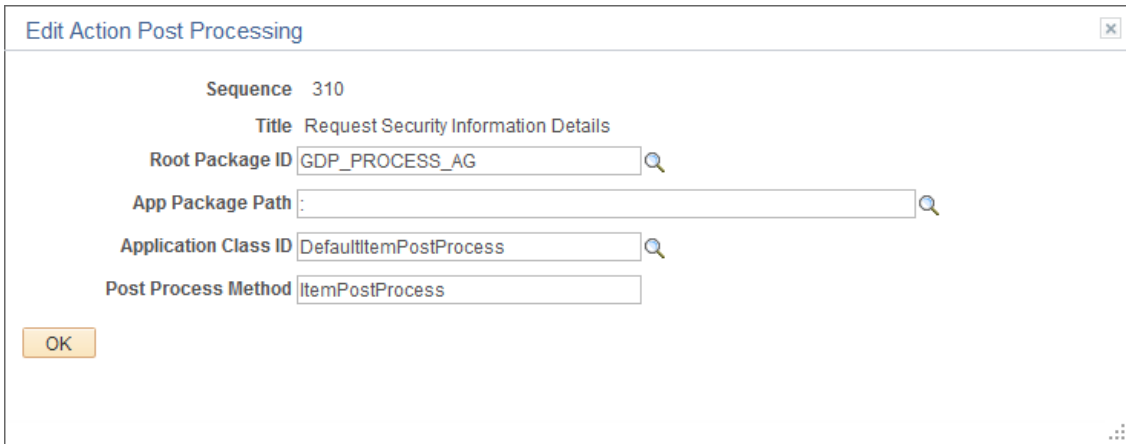
Use the Edit Action Post Processing page (GDP_TMPL_ACTN_APKG) to define any post processing that occurs when an action step is saved.

Navigation:

Click the Edit Action Post Processing link on the Define Guided Process - Action Items page.

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This example illustrates the fields and controls on the Edit Action Post Processing page.



Use this page to enter any post processing that you want the system to perform after the user completes the task associated with the action item. The default values for the fields on this page include logic to update the status of the action item to *Complete* when the component is saved. Changes these default values if you want to associate additional or different post processing logic with the action step.

Field or Control	Description
Root Package ID	Enter the root application package ID where the post process method resides. **Note:** For action items that do not have the *Parent* action type, the default value for this field is *GDP_PROCESS_AG*.
App Package Path	Enter the path to the application class where the post process method resides. **Note:** For action items that do not have the *Parent* action type, the default value for this field is *:*.
Application Class ID	Enter the class ID where the post process method resides. **Note:** For action items that do not have the *Parent* action type, the default value for this field is *DefaultItemPostProcess*.
Post Process Method	Enter the name of the post process method. **Note:** For action items that do not have the *Parent* action type, the default value for this field is *ItemPostProcess*.

Edit Action Question Page

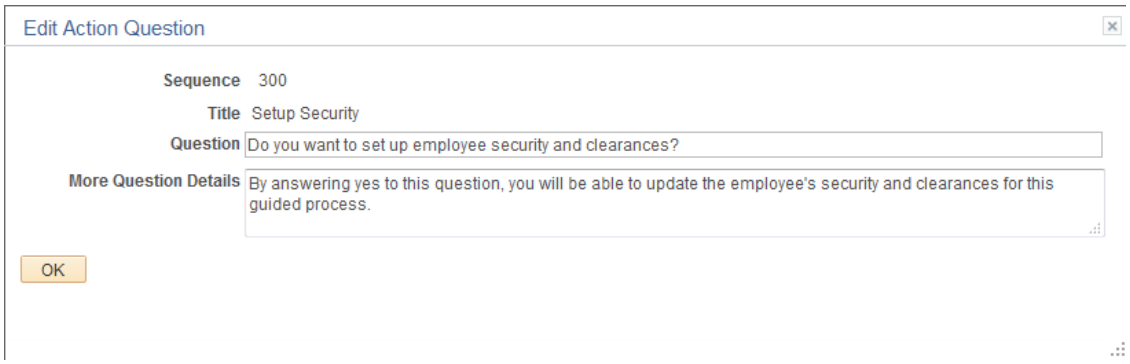
Use the Edit Action Question page (GDP_TMPL_ACTN_QSTN) to create a yes or no question that the user answers to determine whether or not the action item should be included in the guided process.

Navigation:

Click the Edit Action Question link on the Define Guided Process - Action Items page.

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This example illustrates the fields and controls on the Edit Action Question page.



Use this page to create a yes or no question that appears on the Guided Process Questionnaire when a user starts the guided process. If the user selects *Yes* for a question, the associated action item and all of its child items are included in the guided process. If the user selects *No* for a question, the associated action item and all of its child items are excluded from the guided process.

Field or Control	Description
Question	Enter the yes or no question used to determine whether the user wants to include or exclude the action item.
More Question Details	Enter a description that assists the user to understand the ramifications of answering the question.

Edit Action Data Page

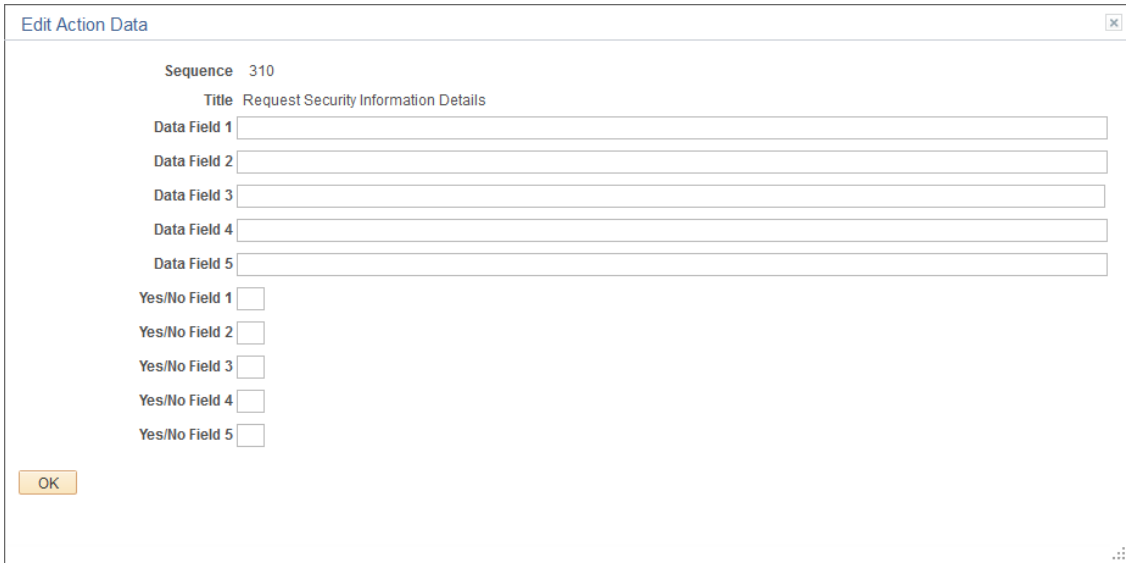
Use the Edit Action Data page (GDP_TMPL_ACTN_DATA) to define data for an action item.

Navigation:

Click the Edit Action Data link on the Define Guided Process - Action Items page.

This example illustrates the fields and controls on the Edit Action Data page.

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Use this page to store related data that the action item uses. For example, you can specify data to populate the details for an integration request action item.

Field or Control	Description
Data Field 1 through **Data Field 5**	Enter any data entry fields that you want to associate with the action item.
Yes/No Field 1 through **Yes/No Field 5**	Enter any yes or no fields that you want to associate with the action item.

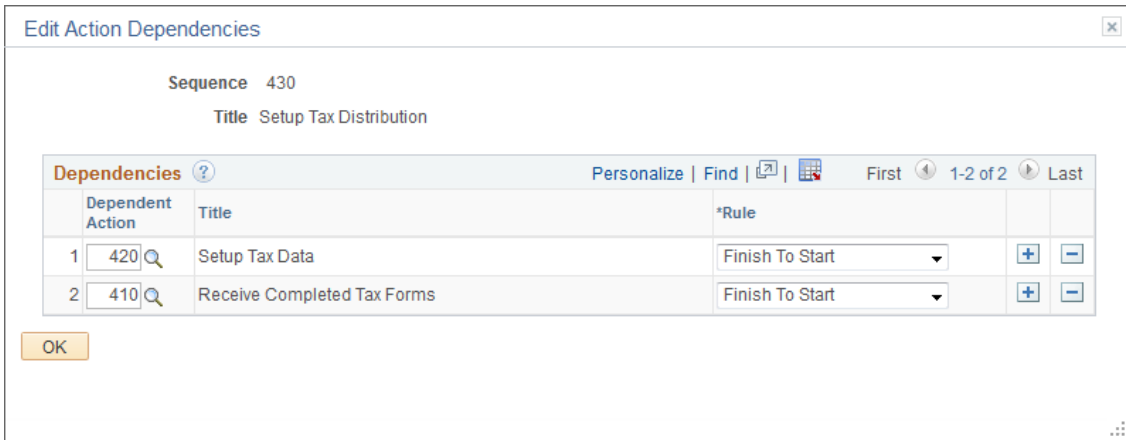
Edit Action Dependencies Page

Use the Edit Action Dependencies page (GDP_TMPL_ACTN_DEP) to define dependencies for an action item.

Navigation:

Click the Edit Action Dependencies link on the Define Guided Process - Action Items page.

This example illustrates the fields and controls on the Edit Action Dependencies page.



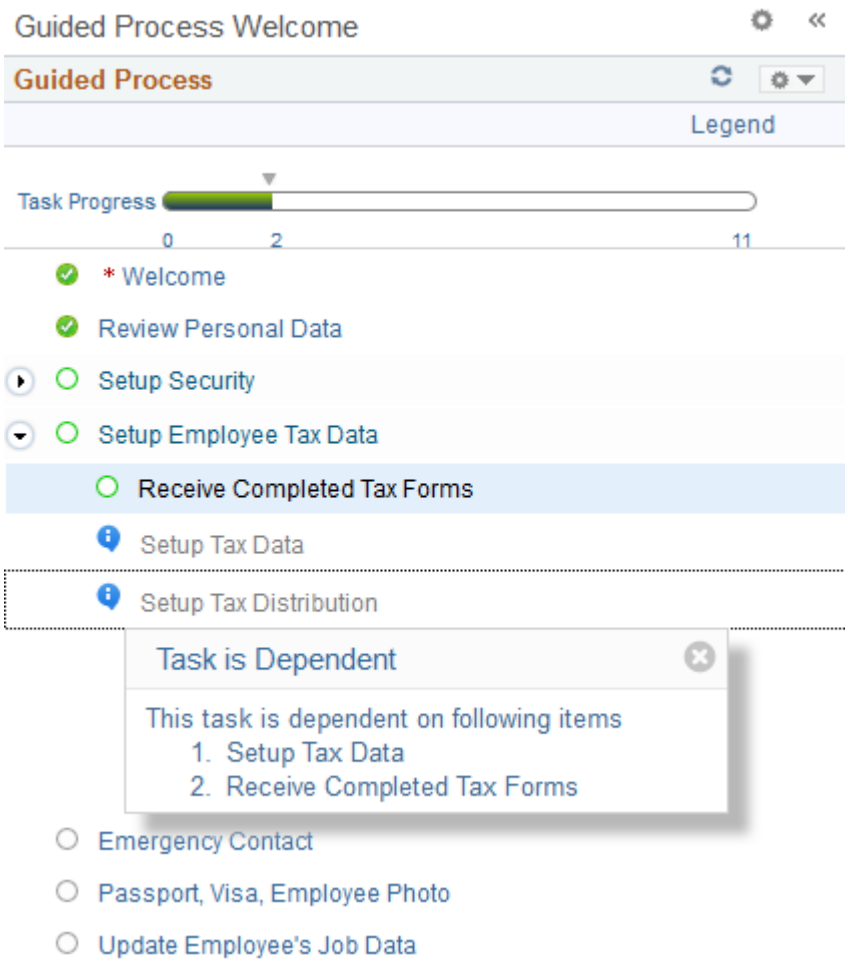
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Use this page to set up one or more dependencies for an action item. In this example, users cannot complete the Setup Tax Distribution action until they have first completed the Receive Completed Tax Forms and Setup Tax Data action items.

Field or Control	Description
Dependent Action	Enter the sequence number of the action upon which this action item is dependent.
Title	Displays the title of the selected action.
Rule	Enter a value of *Finish To Start*.

Example of Action Item Dependencies in the Guided Process Workcenter

This example illustrates how action item dependencies appear in the Guided Process Workcenter pagelet area.



Edit Action Page Text Page

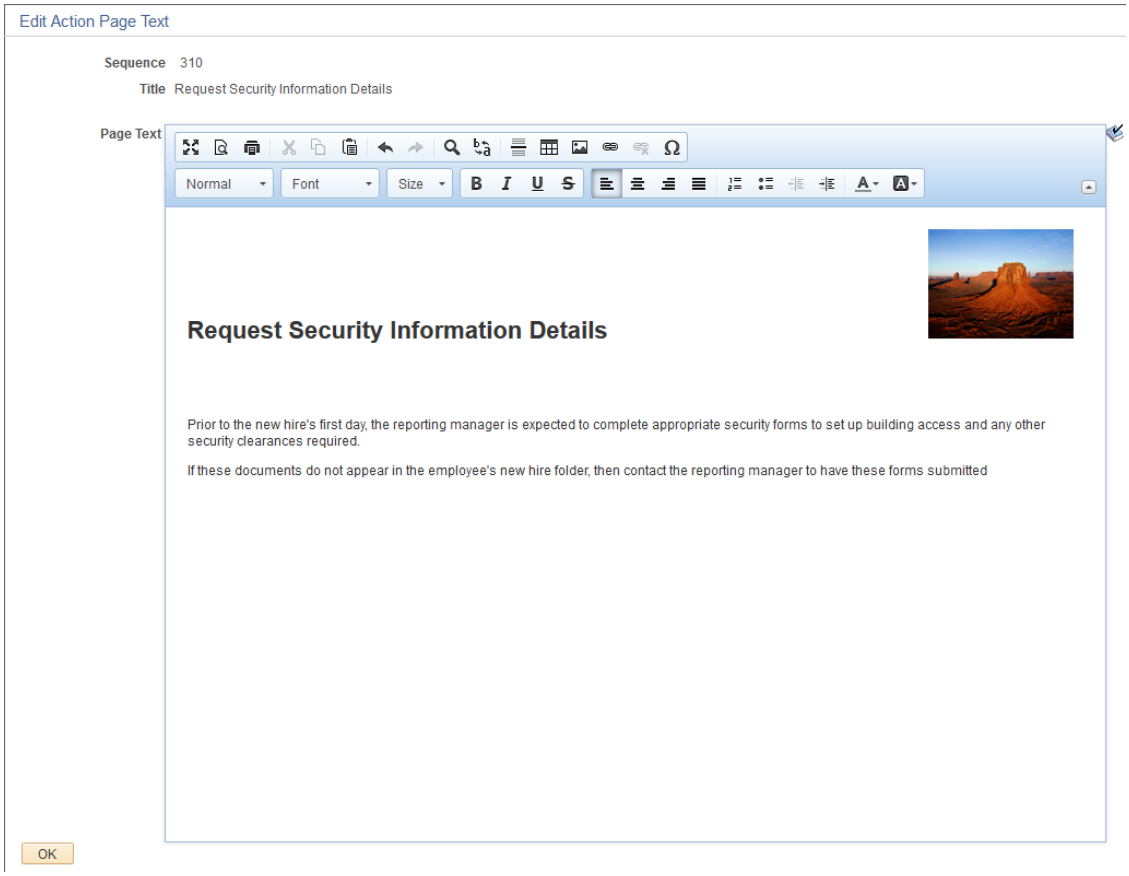
Use the Edit Action Page Text page (GDP_TMPL_ACTN_PGT) to define the page text for an action item.

Navigation:

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Click the Edit Action Page Text link on the Define Guided Process - Action Items page.

This example illustrates the fields and controls on the Edit Action Page Text page.



Use the rich text editor on this page to enter the text and images that display for the action item in the target content area of the Guided Process Workcenter.

If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed.

> **Note**
>
> This page is available for an action item only if the service ID for its related content service is defined as GDP_WELCOME or GDP_INFO on the Edit Action Properties Page.

Define Guided Process - View Summary Page

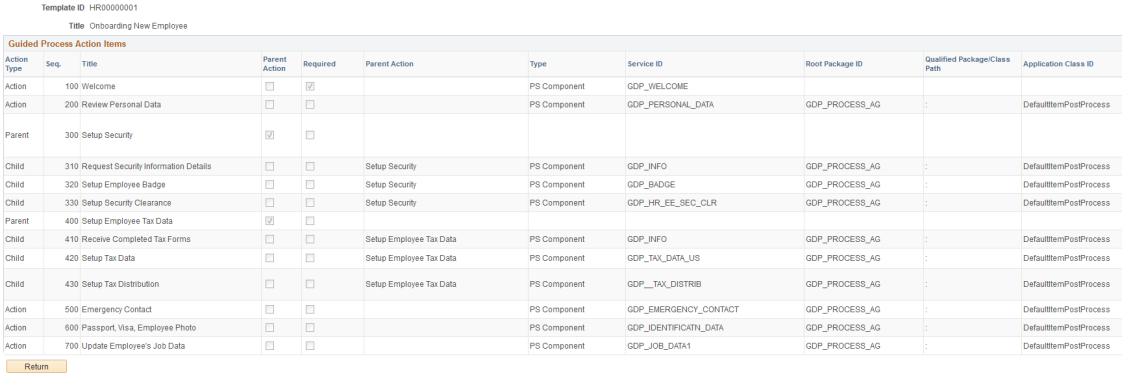
Use the Define Guided Process - View Summary page (GDP_TMPL_ITEMS_VW) to view a display of all the action item configurations for a guided process template.

Navigation:

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Click the View Summary link on the Define Guided Process - Action Items page.

This example illustrates the fields and controls on the Define Guided Process - View Summary page.



Template ID HR00000001

Title Onboarding New Employee

Guided Process Action Items

Action Type	Seq.	Title	Parent Action	Required	Parent Action	Type	Service ID	Root Package ID	Qualified Package/Class Path	Application Class ID
Action	100	Welcome	☐	☑		PS Component	GDP_WELCOME			
Action	200	Review Personal Data	☐	☐		PS Component	GDP_PERSONAL_DATA	GDP_PROCESS_AG	:	DefaultItemPostProcess
Parent	300	Setup Security	☑	☐						
Child	310	Request Security Information Details	☐	☐	Setup Security	PS Component	GDP_INFO	GDP_PROCESS_AG	:	DefaultItemPostProcess
Child	320	Setup Employee Badge	☐	☐	Setup Security	PS Component	GDP_BADGE	GDP_PROCESS_AG	:	DefaultItemPostProcess
Child	330	Setup Security Clearance	☐	☐	Setup Security	PS Component	GDP_HR_EE_SEC_CLR	GDP_PROCESS_AG	:	DefaultItemPostProcess
Parent	400	Setup Employee Tax Data	☑	☐						
Child	410	Receive Completed Tax Forms	☐	☐	Setup Employee Tax Data	PS Component	GDP_INFO	GDP_PROCESS_AG	:	DefaultItemPostProcess
Child	420	Setup Tax Data	☐	☐	Setup Employee Tax Data	PS Component	GDP_TAX_DATA_US	GDP_PROCESS_AG	:	DefaultItemPostProcess
Child	430	Setup Tax Distribution	☐	☐	Setup Employee Tax Data	PS Component	GDP__TAX_DISTRIB	GDP_PROCESS_AG	:	DefaultItemPostProcess
Action	500	Emergency Contact	☐	☐		PS Component	GDP_EMERGENCY_CONTACT	GDP_PROCESS_AG	:	DefaultItemPostProcess
Action	600	Passport, Visa, Employee Photo	☐	☐		PS Component	GDP_IDENTIFICATN_DATA	GDP_PROCESS_AG	:	DefaultItemPostProcess
Action	700	Update Employee's Job Data	☐	☐		PS Component	GDP_JOB_DATA1	GDP_PROCESS_AG	:	DefaultItemPostProcess

Return

This display-only page enables you to view all the configured parameters for the action items of a guided process without having to click the individual Edit Action links.

Related Topics

- Define Guided Process - Action Items Page
  Use the Define Guided Process - Action Items page (GDP_TMPL_ITEMS) to define the steps in the guided process where the user is expected to perform an action.
- Edit Action Properties Page
  Use the Edit Action Properties page (GDP_TMPL_ACTN_PROP) to define the properties for an action item including the related content service associated with the action item.
- Edit Action Post Processing Page
  Use the Edit Action Post Processing page (GDP_TMPL_ACTN_APKG) to define any post processing that occurs when an action step is saved.
- Edit Action Question Page
  Use the Edit Action Question page (GDP_TMPL_ACTN_QSTN) to create a yes or no question that the user answers to determine whether or not the action item should be included in the guided process.
- Edit Action Data Page
  Use the Edit Action Data page (GDP_TMPL_ACTN_DATA) to define data for an action item.
- Edit Action Dependencies Page
  Use the Edit Action Dependencies page (GDP_TMPL_ACTN_DEP) to define dependencies for an action item.
- Edit Action Page Text Page
  Use the Edit Action Page Text page (GDP_TMPL_ACTN_PGT) to define the page text for an action item.

Cloning Guided Processes

The Guided Process Clone Utility component (GDP_CLONE) enables you to easily copy and modify an existing guided process. By cloning a guided process template, you can reconfigure the existing parameters to suit a different business process without having to spend time building a new guided process template from the ground up.

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Page Used to Clone Guided Processes

Page Name	Definition Name	Usage
Guided Process Clone Utility Page	GDP_CLONE	Clone an existing guided process template.

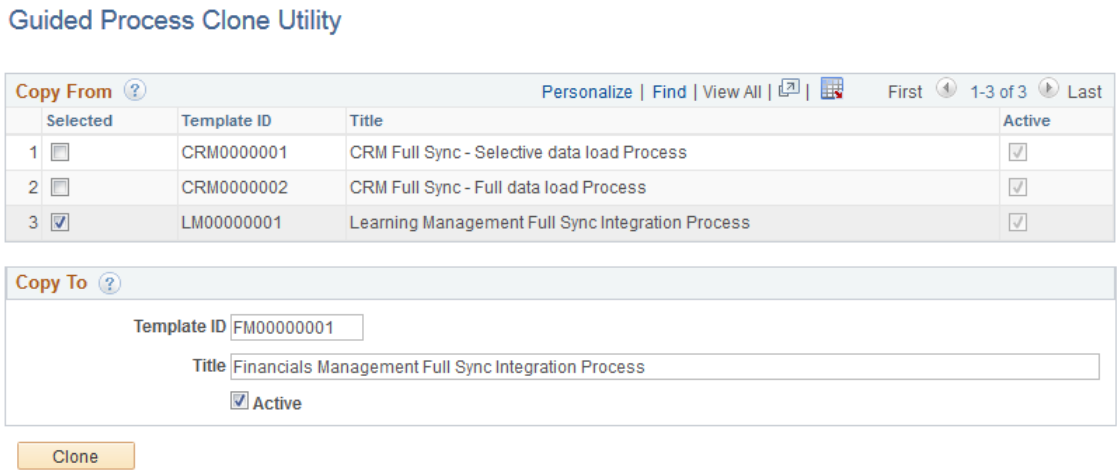
Guided Process Clone Utility Page

Use the Guided Process Clone Utility page (GDP_CLONE) to clone an existing guided process template.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Guided Process**, and then **Guided Process Clone Utility**

This example illustrates the fields and controls on the Guided Process Clone Utility page.



Copy From

Field or Control	Description
Selected	Select the check box next to the guided process template that you want to clone.

Copy To

Field or Control	Description
Template ID and **Title**	Enter the ID and title of the new guided process template you are creating.
Active	Select to activate the new guided process template.
Clone	Click to create a copy of the selected guided process template.

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Running Guided Processes

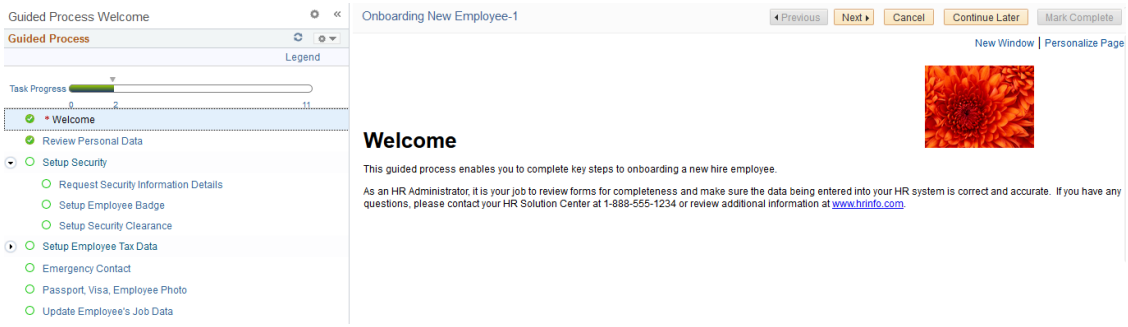
Pages Used to Run the ELM Full Sync Integration Guided Process

Page Name	Definition Name	Usage
Guided Process Summary Pagelet	GDP_SUMMARY_PGLT	Start new guided process instances, and view and continue existing guided process instances.
Start Guided Process Page	GDP_START_PRCS	Initiate a guided process instance.
Select Guided Process Page	GDP_SELECT_PRCS	Select the guided process you want to initiate and answer the guided process questionnaire.
Guided Process - Welcome Page	GDP_WELCOME	Review overview information for the guided process.
Guided Process - Information Page	GDP_INFO	Review information or instructions for a step or group of steps in a guided process.

Understanding the Guided Process Workcenter

You perform the steps of a guided process using the Guided Process Workcenter. You can access this workcenter from the Guided Process Summary Pagelet and the Select Guided Process Page.

This is an example of the Guided Process Workcenter



The Guided Process Workcenter has three areas:

- Navigation subpage
- Pagelet
- Target content

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> **Note**
>
> You can navigate in multiple ways within the Guided Process Workcenter. You can interact directly with the steps in the pagelet area by expanding sections and clicking directly on the steps or you can use the **Next** and **Previous** buttons that appear in the navigation subpage area.

Navigation Subpage Area

In the navigation subpage area, you can access navigational buttons that will take you through the steps of the guided process.

This is an example of the navigation subpage area of the Guided Process Workcenter.



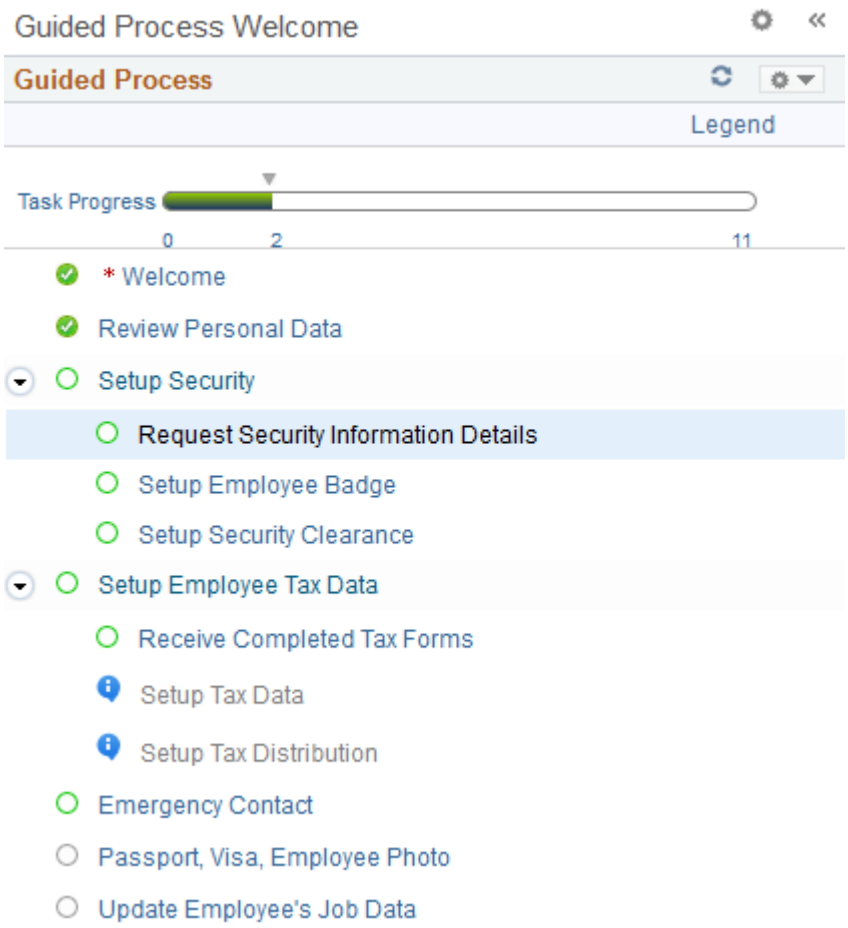
Term	Definition
Previous	Click to move to the previous step in the guided process.
Next	Click to move to the next step in the guided process.
Mark Complete	Click to mark a step as manually completed. It is necessary only for pages that contain nothing to save, such as an overview page. Once you finish reading the text on pages that require no input or saving, you can click the Mark Complete button to proceed.
Cancel	Click to delete the current instance of the guided process and return to theGuided Process Summary Pagelet or Select Guided Process Page, whichever you used to access the guided process. **Note:** Deleting the current instance of a guided process does not affect any of the processes that have completed or are in progress. It is not recommended, however, that you delete the current instance while any processes are running. This is because once the current instance is deleted, you cannot review the status of the process.
Exit	Click to exit the current instance of the guided process and return to the Guided Process Summary Pagelet or Select Guided Process Page, whichever you used to access the guided process.

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> **Note**
>
> The **Mark Complete** and **Cancel** buttons are optional based on the requirements of the guided process. It is good practice to include an **Exit** button to enable users to easily navigate away from the guided process.

Pagelet Area

This is an example of the pagelet area of the Guided Process Workcenter.



The pagelet area displays all the standalone actions and parent actions of the guided process. You can expand each parent action to view its individual child actions.

Term	Definition
(Task is Dependent)	Appears next to actions with one or more dependencies that have not yet been met. Click to view the action dependencies.

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Target Content Area

This is an example of the target content area of the Guided Process Workcenter.



The target content area is the primary area where you review information and perform guided process actions. Examples of what the target content area can include are:

- Overview information for the guided process.
- Information providing guidance for a step or group of steps.
- HCM application pages enabling you to enter or modify data.
- Requests to initiate processes.

You determine what appears in the target content area for each step in the guided process when you set up the action items using the Define Guided Process - Action Items Page.

Guided Process Summary Pagelet

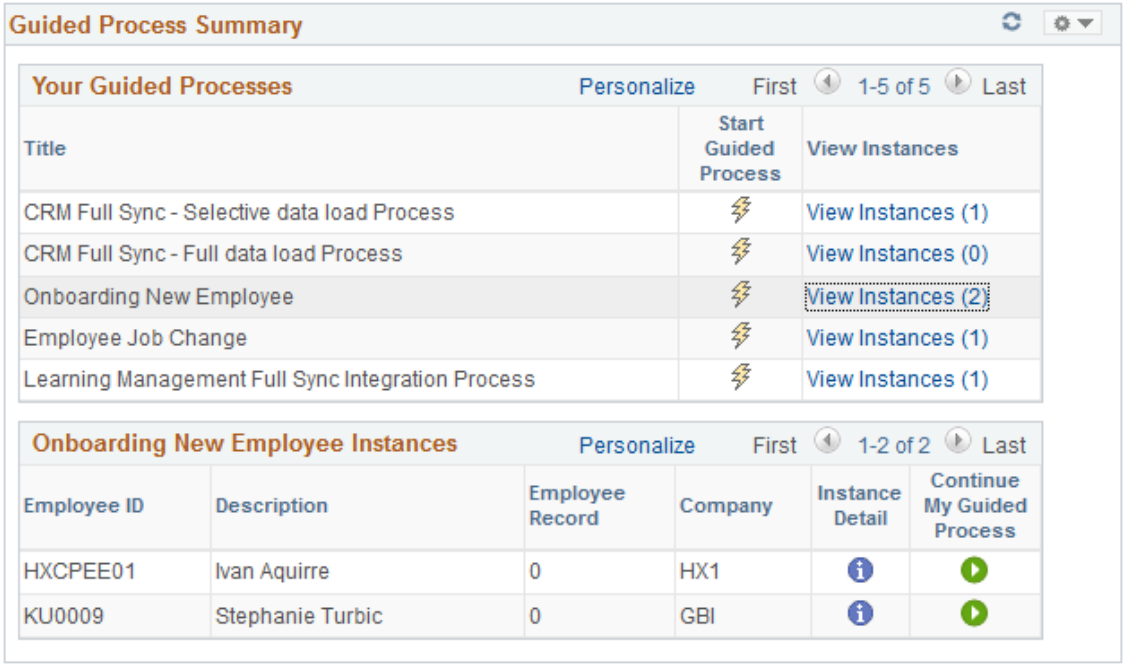
Use the Guided Process Summary pagelet to start new guided process instances, and to view and continue existing guided process instances.

Navigation:

Access a dashboard to which the Guided Process Summary pagelet has been added.

This example illustrates the fields and controls on the Guided Process Summary pagelet.

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Your Guided Processes

This grid displays all the guided process that you have permission to initiate and cancel.

Field or Control	Description
(Start Guided Process)	Click to initiate the guided process using the Start Guided Process Page.
View Instances	Click to view the a list of the instances for the guided process that you have initiated. These instances appear in the <Guided Process> Instances grid.

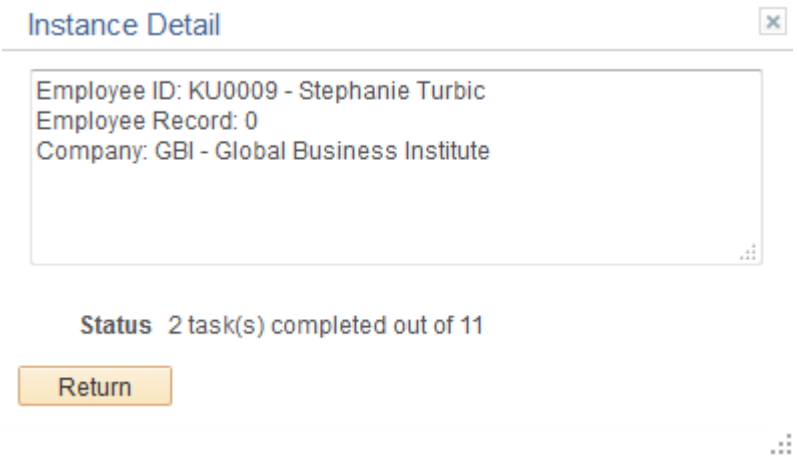
<Guided Process> Instances

This grid displays the instances that you initiated for a specific guided process.

Field or Control	Description
(Instance Detail)	Click to access the Instance Detail page where you can view the status of a guided process instance.

This example illustrates the fields and controls on the Instance Detail Page.

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This page displays the context key field values for the guided process instance. The **Status** field displays how many of the total tasks have been completed for the guided process.

Field or Control	Description
(Continue My Guided Process)	Click to open the guided process instance in the Guided Process Workcenter where you can continue performing the steps of the guided process.

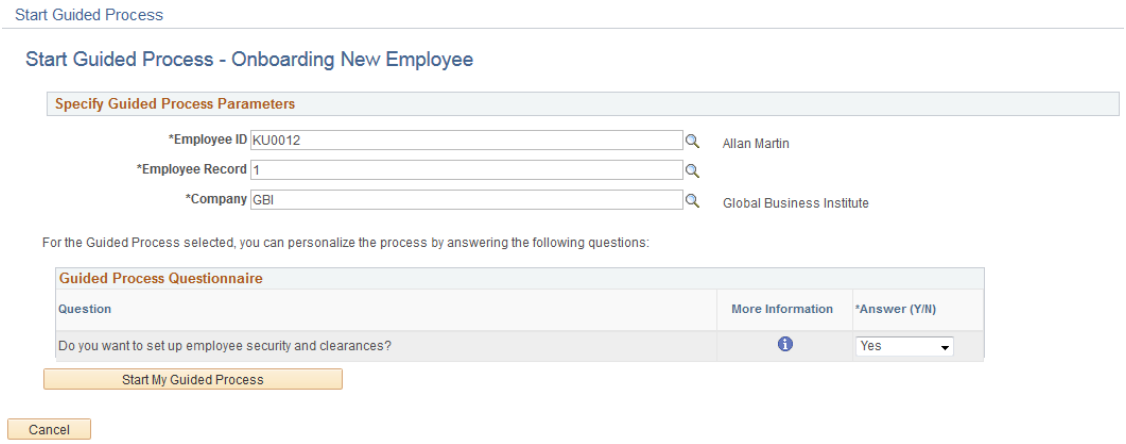
Start Guided Process Page

Use the Start Guided Process page (GDP_START_PRCS) to initiate a guided process instance.

Navigation:

Click the Start Guided Process icon on the Guided Process Summary pagelet.

This example illustrates the fields and controls on the Start Guided Process page.



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> **Note**
>
> This page is accessible only from the Guided Process Summary Pagelet.

Specify Guided Process Parameters

The fields that appear in this group box are determined by the context key fields you define on the Define Guided Process - Properties Page. Enter values in the fields to define the context keys for the guided process instance.

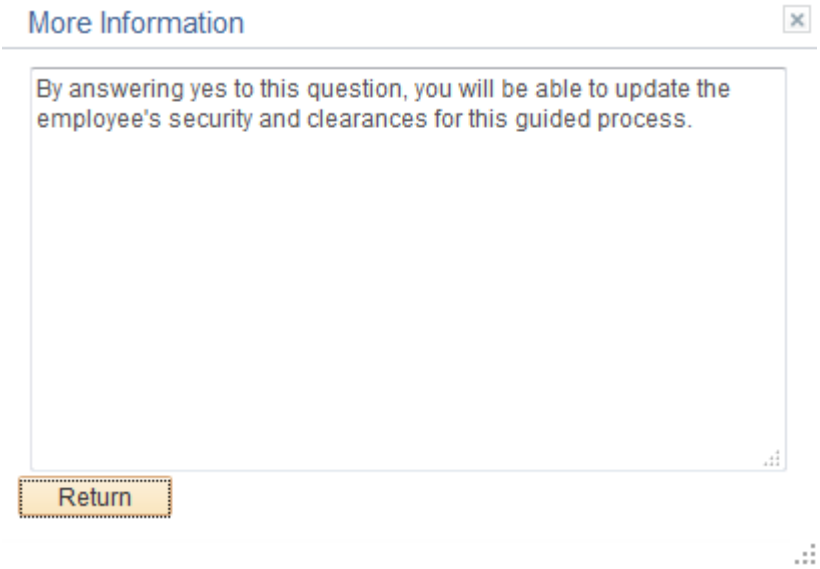
> **Note**
>
> A maximum of five context key fields can be defined for a guided process template.

Guided Process Questionnaire

This grid displays the questions that users answer to determine whether the system includes the associated action item in the guided process. You define these questions using the Edit Action Question Page.

Field or Control	Description
Question	Displays the yes or no question associated with an action item.
(More Information)	Click to access the More Information page where you can view additional details that explain the impact of answering the question.

This is an example of the More Information page.



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Field or Control	Description
Answer (Y/N) (answer yes or no)	Select *Yes* to include the associated action item in the guided process, or *No* to exclude it.
Start My Guided Process	Click to access the Guided Process Workcenter where you can view and process the steps of the guided process.

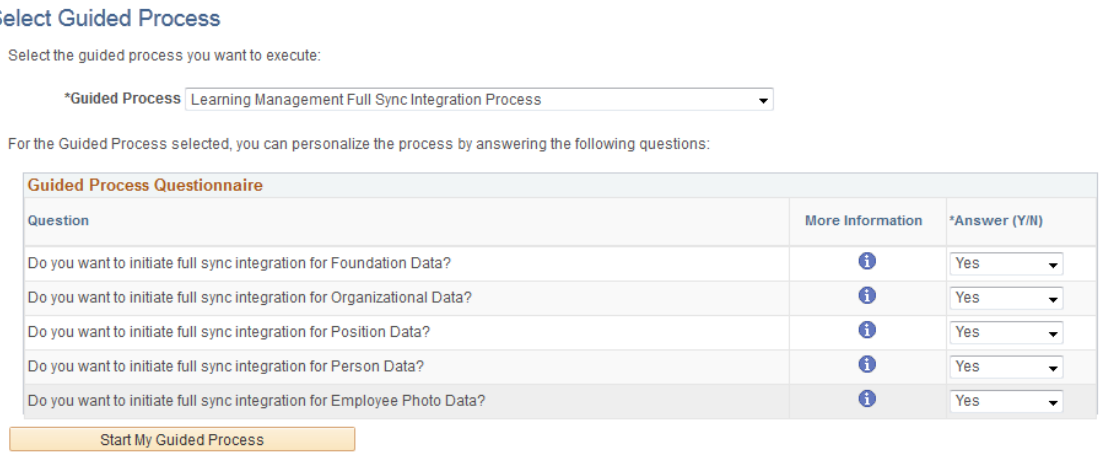
Select Guided Process Page

Use the Select Guided Process page (GDP_SELECT_PRCS) to select the guided process you want to initiate and answer the guided process questionnaire.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Guided Process**, and then **Select Guided Process**

This example illustrates the fields and controls on the Select Guided Process page.



> **Note**
>
> You can use this page only for guided processes that have OPRID as the only context key field. For more information on context data for guided processes, see the product documentation for the Define Guided Process - Properties Page.

Guided Process Questionnaire

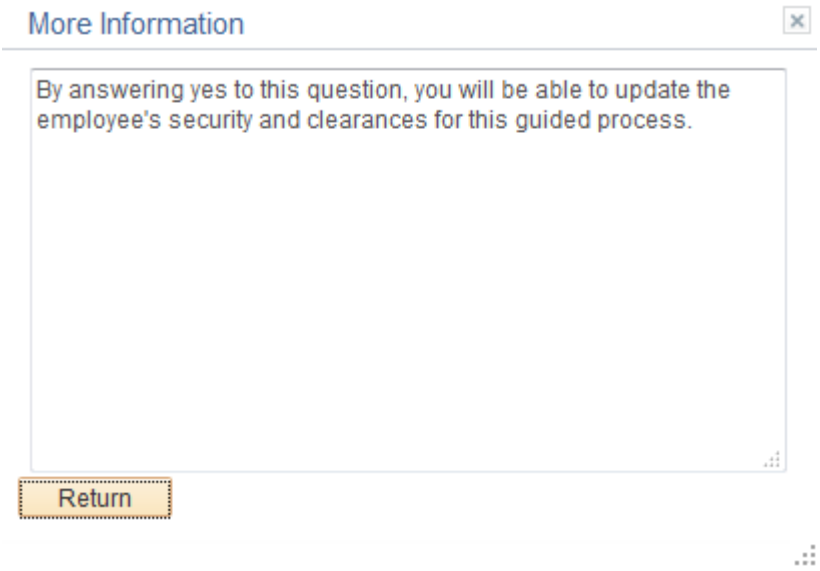
This grid displays the questions that users answer to determine whether the system includes the associated action item in the guided process. You define these questions using the Edit Action Question Page.

Field or Control	Description
Question	Displays the yes or no question associated with an action item.

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Field or Control	Description
(More Information)	Click to access the More Information page where you can view additional details that explain the impact of answering the question.

This is an example of the More Information page.



Field or Control	Description
Answer (Y/N) (answer yes or no)	Select *Yes* to include the associated action item in the guided process, or *No* to exclude it.
Start My Guided Process	Click to access the Guided Process Workcenter where you can view and process the steps of the guided process.
Continue My Guided Process	If you have already started your guided process, this button appears in place of the Start My Guided Process button. Click it to continue your guided process where you left off.
Delete Guided Process	This button appears only if you have already started a guided process. Click it to delete the current guided process.

Guided Process - Welcome Page

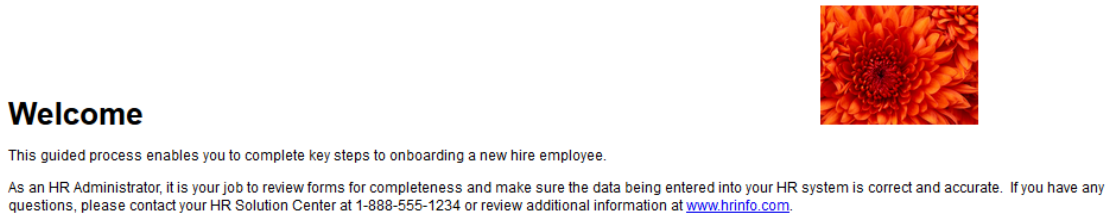
Use the Guided Process - Welcome page (GDP_WELCOME) to review overview information for the guided process.

Navigation:

Access a guided process step defined to access the GDP_WELCOME page.

This example illustrates the fields and controls on the Guided Process - Welcome page.

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This page displays overview information for the guided process. You define the text and images that appear on this page using the Edit Action Page Text Page.

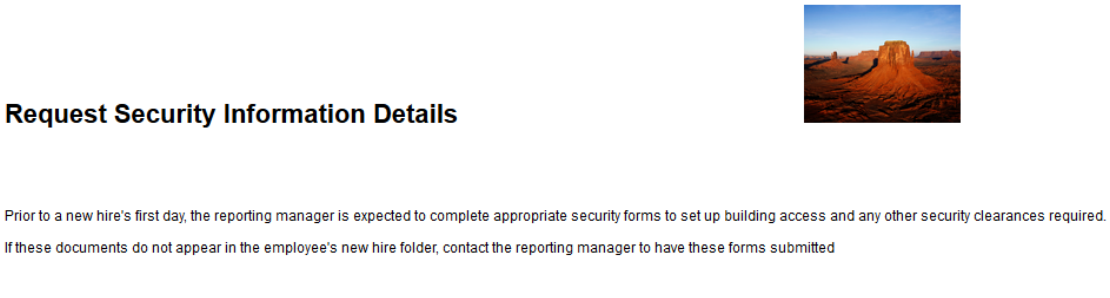
Guided Process - Information Page

Use the Guided Process - Information page (GDP_INFO) to review information or instructions for a step or group of steps in a guided process.

Navigation:

Access a guided process step defined to access the GDP_INFO page.

This is an example of the Guided Process - Information page.



This page displays information about a step or group of steps for the guided process. You define the text and images that appear on this page using the Edit Action Page Text Page.

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Working with File Integration Framework

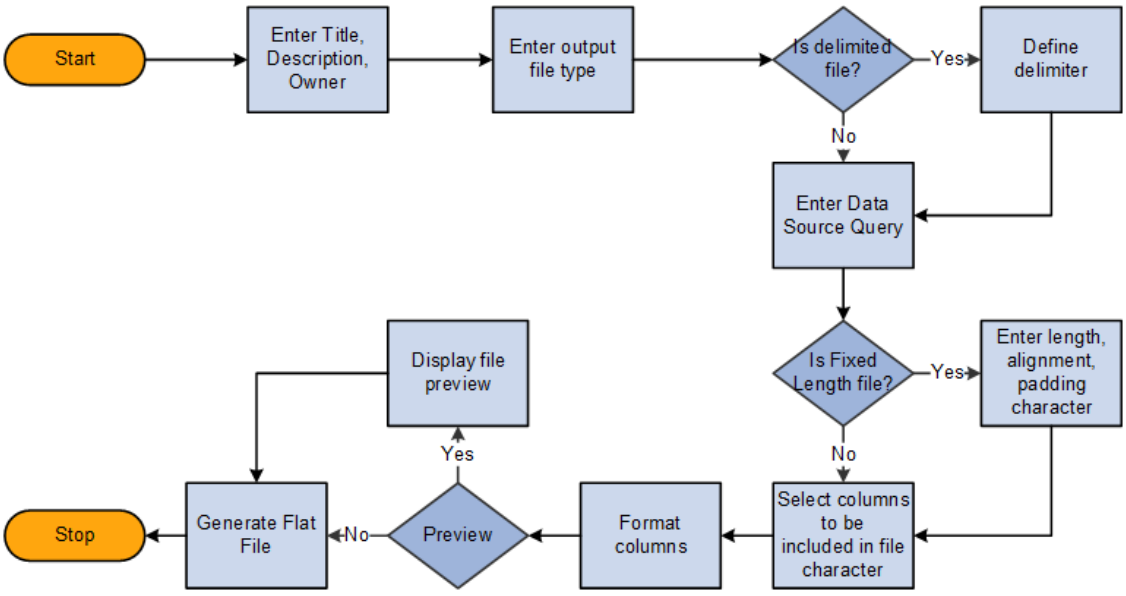
Understanding File Integration Framework

The File Integration Framework is a guided process that assists users in creating Flat files such as Benefits AD&D, PNA Direct deposit etc. It is a setup driven configurable framework to generate flat files. Users do not have to customize the SQR to generate the files.

Using this, users can:

- Set row level security to the data in the flat file configuration components.
- Define constants and system variables that can be used in the flat file output.
- Configure the output file type.
- Order and format the output columns.
- Preview and generate the file.

This diagram illustrates the File Integration Wizard process flow to generate flat files.



Using File Integration Framework to Generate Flat Files

Using the File Integration Framework, users can create file definitions. Once the security has been set, Users use an activity guide to create the file definition.

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Pages Used to Create File Definition and Generate Flat Files

Page Name	Definition Name	Usage
User Access Group Setup Page	FF_ACCESS_FL	Set security groups to be assigned for file definitions.
File Definitions Page	FF_SETTING_SRCH_FL	View and create file definitions.
File Definition Configuration - File Definition Page	FF_SETTINGS_FL	Set general configuration for the file definition.
File Definition Configuration - Additional Information Page	FF_SETTING_ADDL_FL	Set additional parameters for the file definition.
File Definition Configuration - Define Sections Page	FF_SECT_DETAILS_FL	Define the sections for the file.
File Definition Configuration - Define Sections Columns Page	FF_COLUMN_DETLS_FL	Define the columns for the sections.
File Definition Configuration - File Preview Page	FF_PREVIEW_FL	Preview the file definition.
Variable Definition Setup Page	FF_VARIABLE_DTL_FL	Create variables for the file definition.
Schedule File Generation Page	FF_RUNCNTL_FL	Run the file definition.

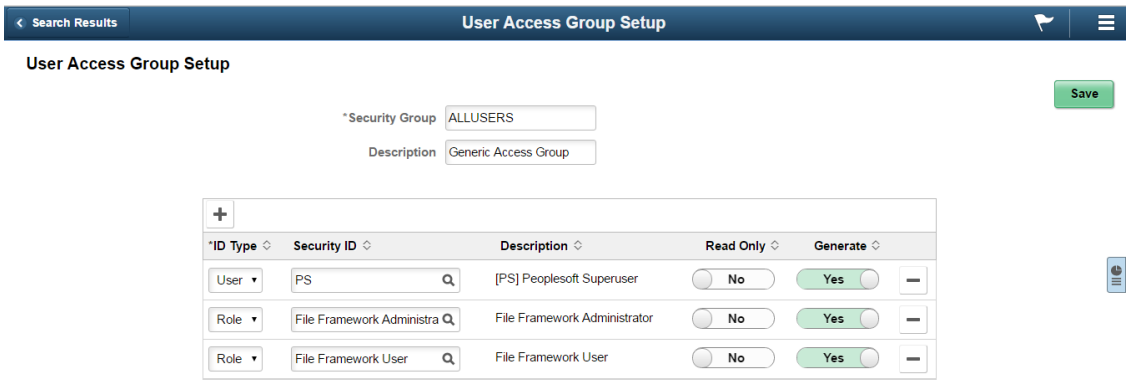
User Access Group Setup Page

Use the User Access Group Setup page to set row level security for each file definitions.

Navigation:

Set Up HCM, Common Definitions, File Integration Framework, User Access Group Setup

User Access Group Setup page



The fields and their description are given later in this page.

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Field or Control	Description
Security Group	Access ID for a group to which a set of security permissions can be set. **Note:** The members of the security group need the following permissions to the file integration pages: File Integration Administrator, File Integration User. If users needs to view the activity guide, then they need the File Framework Viewer permission.
Description	Description of the Security Group.
ID Type	Select the ID type of User ID or Role to grant authorization to.
Security ID	Select the authorized editor's security ID based on the ID type.
Description	This is a read-only field that indicates the related display value for the security ID.
Read Only	Option to whether the User ID or Role can edit the configuration or can only view it. By default they can edit the configuration.
Generate	Option to whether the User ID or Role can generate the flat file. By default they can generate the flat file.

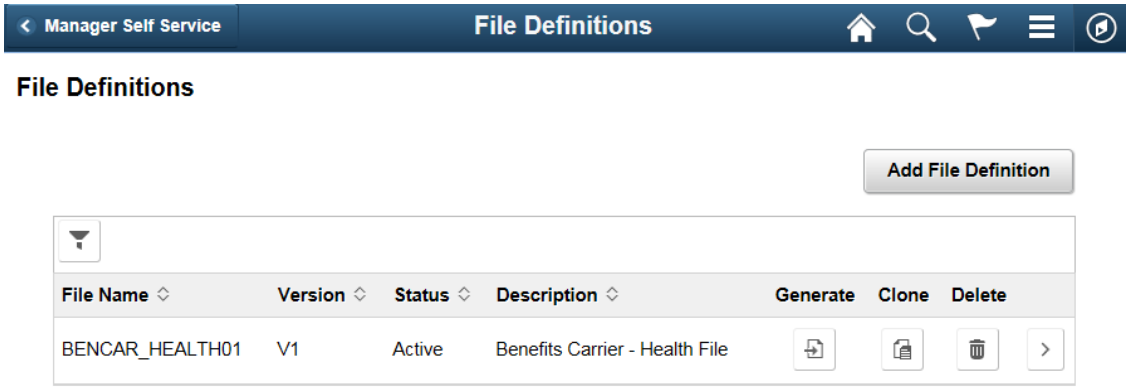
File Definitions Page

Use the File Definitions page (FF_SETTING_SRCH_FL) to view the file definitions and to create new definitions.

Navigation:

Set Up HCM, Common Definitions, File Integration Framework, File Definitions.

File Definitions Page



Users can filter for a file definition using the filter option. The fields and their description are given later in this page.

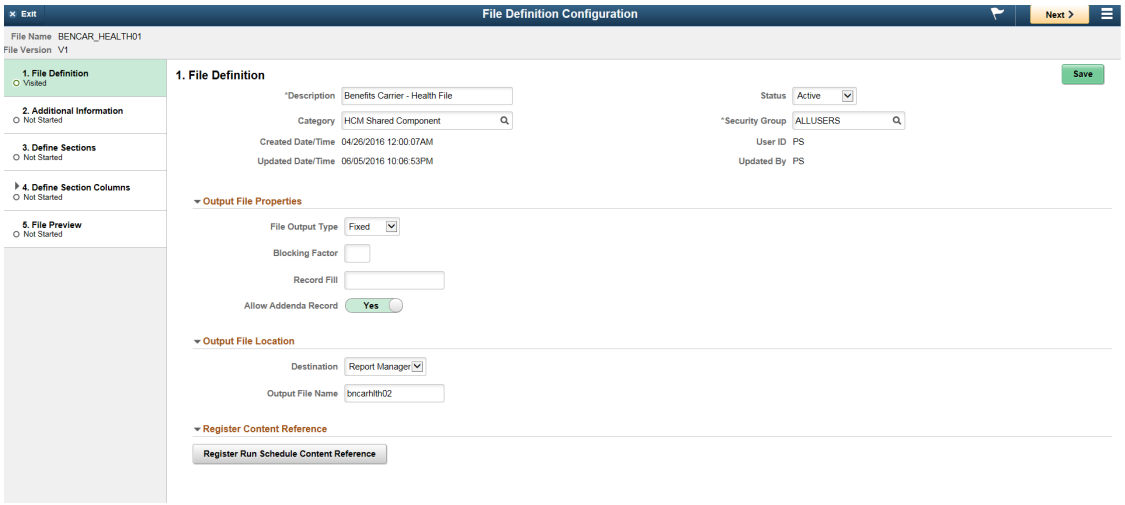
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Field or Control	Description
File Name	Name of the flat file definition.
Version	Version of the file definition.
Status	The status of the file definition. The available statuses are Active, In Progress and Inactive. Only Active file definitions can be selected at runtime.
Description	Description of the file definition.
Generate	Generate the flat file. This can be done only if the Status of the file definition is Active.
Clone	Clone the file definition.
Delete	Delete the file definition.

File Definition Configuration - File Definition Page

Use the File Definition Configuration - File Definition page (FF_SETTINGS_FL)to set general definitions for the file.

File Definition Configuration - File Definition Page.



Field or Control	Description
Description	Description of the file definition.
Status	Status of the file definition. The available statuses are Active, In Progress and Inactive.
Category	Choose the Category.
Security Group	Security group for the file definition. with this user can control the members who can view or edit the file definition.
File Output Type	Specify the whether the file output is Fixed or Delimited.

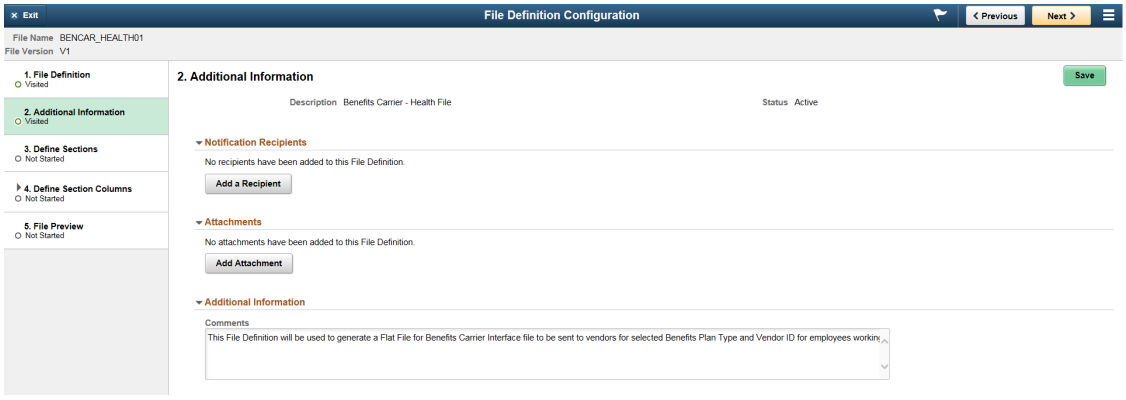
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Field or Control	Description
Blocking Factor	For Fixed output file, if required, specify the blocking factor. i.e. the number of records of a file that make a block. The total number of records in the flat file should be evenly divisible by the blocking factor.
Record Fill	For fixed output file, specify the record fill if the actual number of records is not evenly divisible by the blocking factor.
Delimiter	For delimited files, specify the delimiter. Available delimiters are Comma, Other, Semi Colon, Space, Tab. Comma is the default delimiter. If Other is selected, then a character input text box is displayed to define the delimiter.
Qualifier	For delimited files, specify the qualifier.
Allow Addenda Record	Option to add additional record based on certain conditions. This is done while defining the section columns.
Destination	Destination for the output file. Available destinations are File Path, Report Manager, URL.
Output File Name	Name of the output file. This can be changed during file generation.
Register Run Schedule Content Reference	Creates a direct link to run the file definition.

File Definition Configuration - Additional Information Page

Use the File Definition Configuration - Additional Information page (FF_SETTING_ADDL_FL) to set additional definitions for the file.

File Definition Configuration - Additional Information Page



Field or Control	Description
Add a Recipient	Add the recipients that need to be notified during file generation.

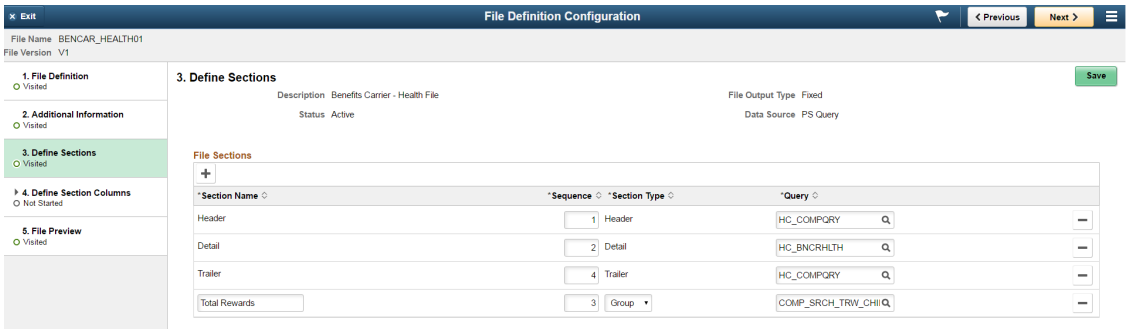
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Field or Control	Description
Add Attachment	Add any supplementary file attachment for the recipients.
Additional Information	Add additional comments for the recipients.

File Definition Configuration - Define Sections Page

Use the File Definition Configuration - Define Sections page (FF_SECT_DETAILS_FL) to define the sections for the file.

File Definition Configuration - Define Sections Page



Field or Control	Description
Section name	Name of the section.
Sequence	The sequence in which the sections should be arranged.
Section Type	The type of sections. Available section types are Header, Detail, Trailer, Group. **Note:** The Group section enables users to group the output based on particular criteria. e.g. Company, Department etc.
Query	Choose the associated PS Query for the section.

The Types of section available are Header, Detail, Trailer and Group.

Group Section

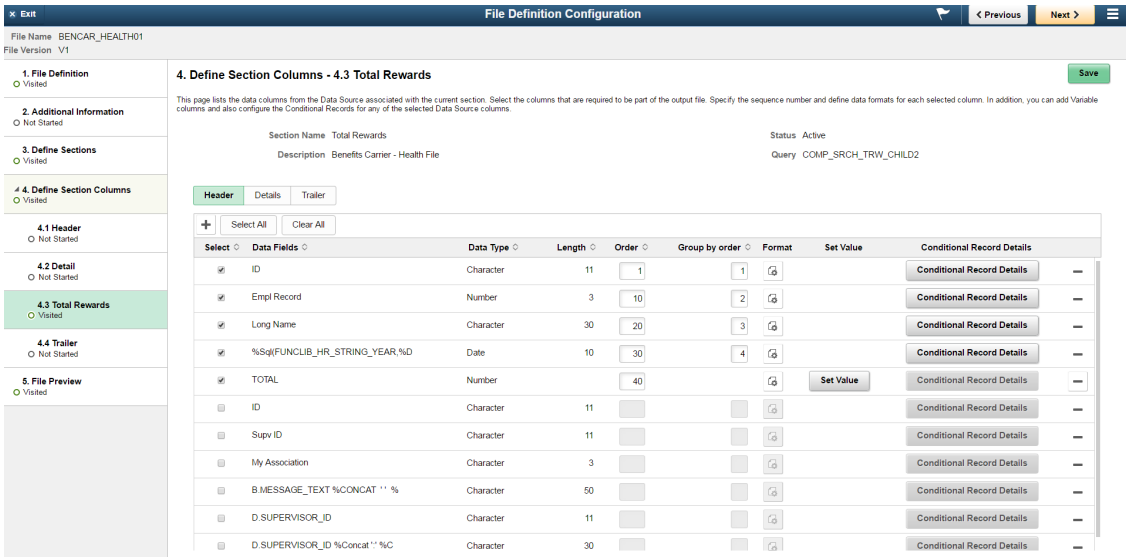
This section is used when the user wants to group the generated output. The output for a group section is generated from a single data source where the group header and trailer information is common to all detail rows in the output. e.g. User wants to generate the employee payment details for a particular paygroup, but would want the output to be grouped by company.

File Definition Configuration - Define Sections Columns Page

Use the File Definition Configuration - Define Sections Columns page (FF_COLUMN_DETLS_FL) to configure the columns for the sections.

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File Definition Configuration - Define Sections Columns Page.



Field or Control	Description
Select	Select the data fields to be included in the output file.
Data Fields	Name of the data field.
Data Type	Data type of the field.
Length	Length of the data source field.
Order	Enter a sequence for the Section column. This field determines the order in which the data field appears in the output file.
Group by order	Group the detail rows based on the Group by order columns and in the order of sequence specified.
Format	The format of the data field.
Set Value	If additional variables have been added from the Variable Definition page, set the value of the variable. For more details, see Variable Definition Setup Page
Conditional Record Details	Specify the conditional record details. This field is displayed only if user has selected Allow Addenda Record in the File Definition page.

In addition to the data populated from a query, administrators can also add variables that would be displayed in the output file. Administrators would not be allowed to delete the data source columns that are populated from data source query, but they can delete the manually added variables from the list. User defined variables of type Calculated can only be added to Header, Trailer or a Group section and would not be available for Detail sections.

Set Value for the Variable

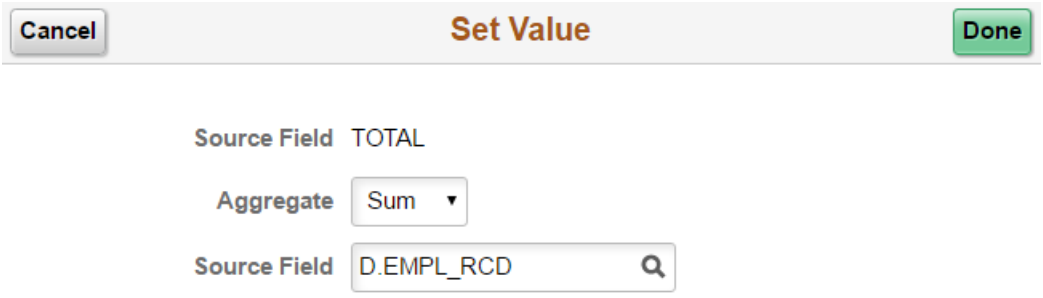
For adding a Constant Variable, a free text field is displayed to enter the value for the constant variable.

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A System variable is used to add current system information to the output file. The following options are available for System variable:

- As Of Date
- Current Date
- Current DateTime
- Current Time
- UserId
- Sequence number

Set a calculated value.



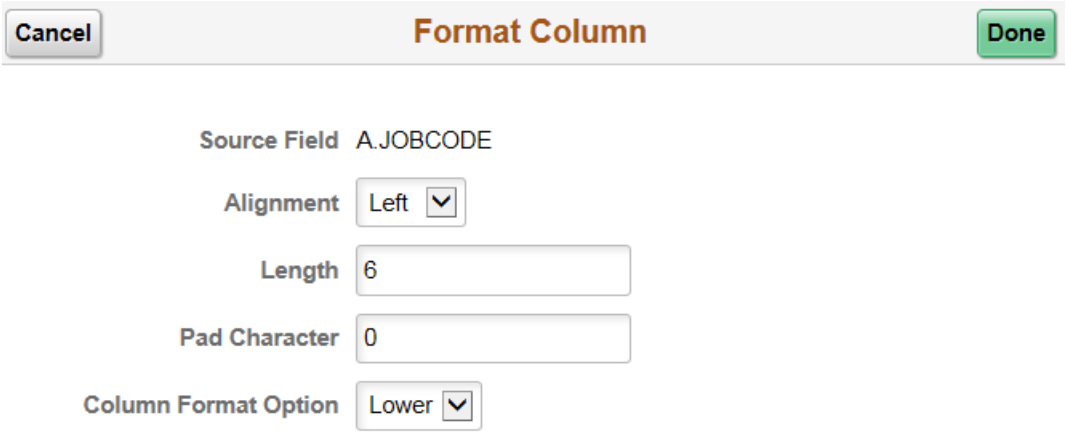
A Calculated variable is used to display aggregates of data source in the file output. Users can specify the type of aggregate (Avg, Count, Max, Min and Sum).

Format

The Format option is enabled for the data field that the user chooses to include as part of the file definition.

Format Column

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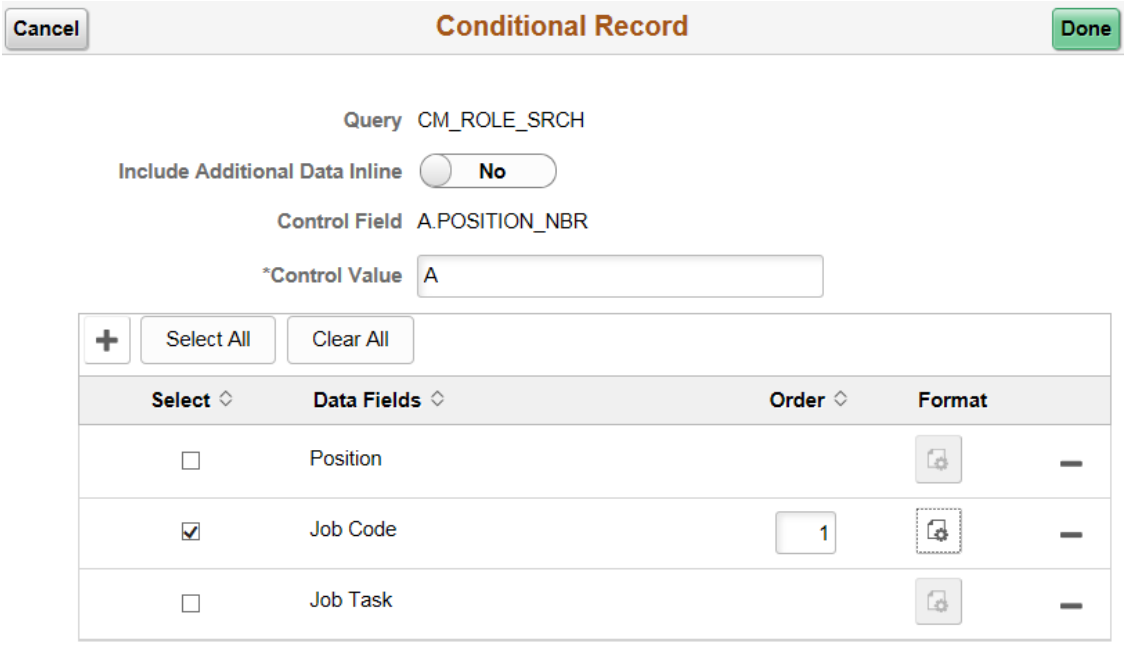
Field or Control	Description
Source Field	Name of the data field.
Alignment	Alignment of the data.
Length	Length of the data.
Pad Character	Padding character for rest of the space in the data. For example if length of the data is 6 and padding character is 0, then the data J23 is displayed as 000J23.
Column Format Option	Format options for data. The options change based on the data type.

Conditional Record Details

This field is displayed if user has selected Allow Addenda Record in the File Definition page. User can specify the condition based on which a particular additional record should be displayed.

Conditional Record Details

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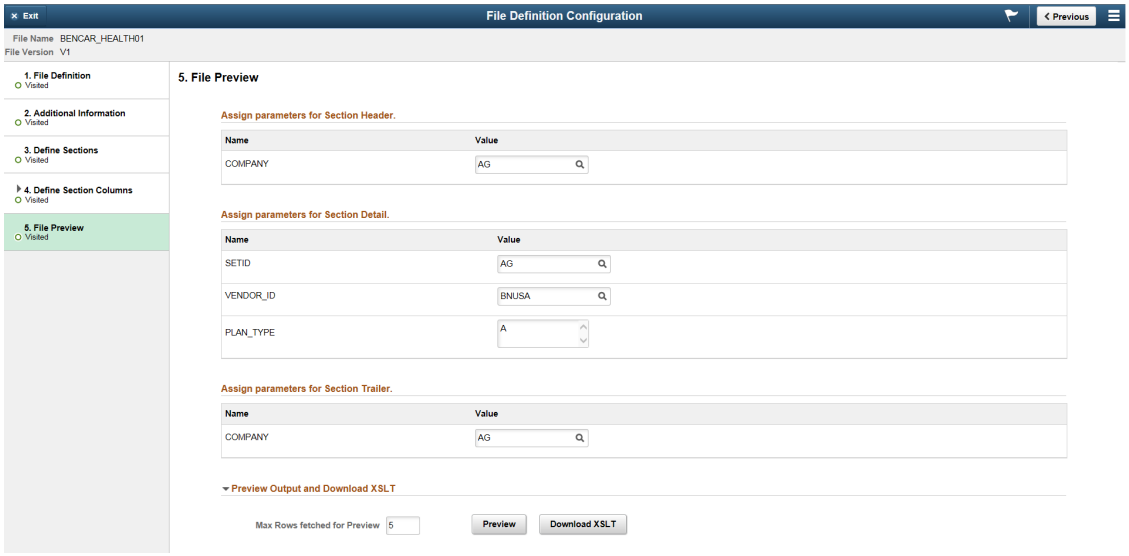
Field or Control	Description
Query	The Query for the conditional record.
Include Additional Data Inline	Whether to display the conditional data in the same line as the main record.
Control Field	The control field for the conditional data.
Control value	The value based on which the conditional data is displayed.
Select	The data field for which conditional data is displayed.
Data Fields	Name of the data field.
Order	Order in which the conditional data should be displayed.
Format	Format of the conditional data.

File Definition Configuration - File Preview Page

Use the File Definition Configuration - File Preview page (FF_PREVIEW_FL) to preview the file.

File Definition Configuration - File Preview Page.

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Enter the variables for the file definition. Users can choose to set maximum the rows to be displayed for the preview. Users can download and view the XSLT to process the query input.

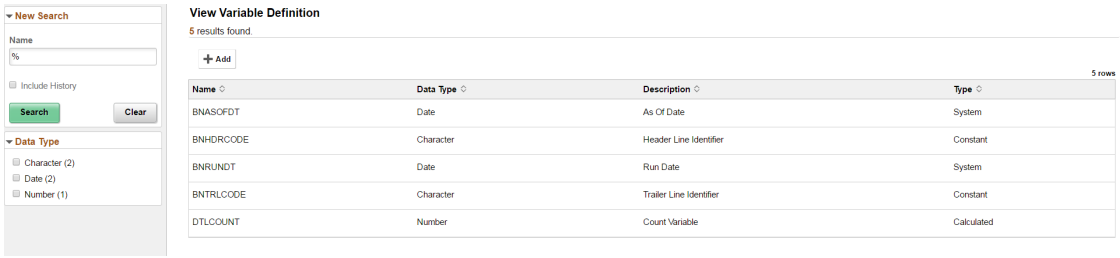
Variable Definition Setup Page

Use the Variable Definition Setup page (FF_VARIABLE_DTL_F) to create additional variables for the file. The defined variables are used to set values in the File Definition Configuration - Define Sections Columns Page

Navigation:

Set Up HCM, Common Definitions, File Integration Framework, Variable Definition Setup.

Variable Definition Page



Field or Control	Description
Name	Name of the variable.
Data Type	Data type of the variable. Available data types are Character, Date, DateTime, Number, Time.
Description	Description of the variable.
Type	Type of variable. Available types are Calculated, System, Constant.

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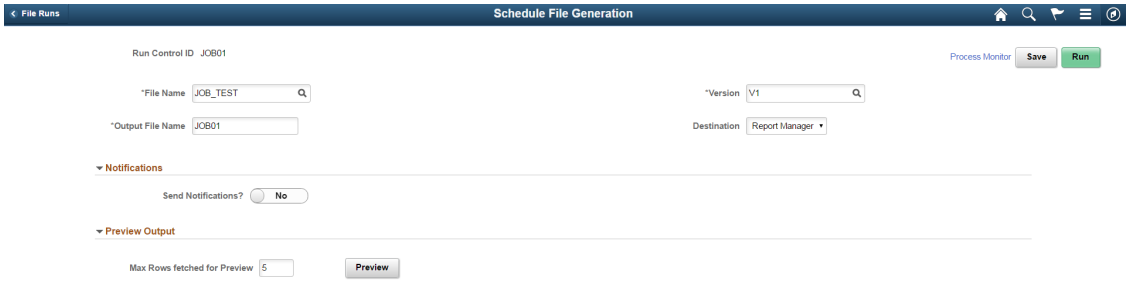
Schedule File Generation Page

Use the Schedule File Generation page (FF_RUNCNTL_FL) to run the file definitions.

Navigation:

Set Up HCM, Common Definitions, File Integration Framework, Schedule File Generation.

Schedule File Generation Page



Field or Control	Description
Run Control ID	Run Control ID for this definition.
File Name	Name of the file definition to be run.
Version	Version of the file.
Output File Name	Choose the name of the output file.
Destination	Choose the destination of the output file.
Send Notifications?	Choose whether recipients need to be notified during file generation.
Max Rows fetched for Preview	Specify the maximum rows to display for the preview of the file
Preview	Preview the file
Run	Run the file definition.
Process Monitor	Link to the Process Monitor page.

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Understanding and Setting Up PeopleSoft Search for HCM

Understanding PeopleSoft Search Framework Implementation for HCM

The PeopleSoft Search Framework provides a standard, declarative method for creating, deploying, and maintaining search indexes for all PeopleSoft applications. PeopleSoft Search, which is comprised of Global Search and Keyword Search Page search, is a PeopleTools indexed search technology that relies on the integrated search engine by way of Integration Broker. It creates and updates indexes in the search engine, and requires the use of PeopleSoft Query or Connected Query to create search definitions that identify the objects and attributes to make available to the indexes. Integration Broker provides the interface between PeopleSoft Search Framework and the search engine to deploy the search definitions, build the indexes, and return the search results.

This video demonstrates using search in PeopleSoft:

Video: Using Search in PeopleSoft Applications

PeopleSoft Search Framework supports both *Global Search* and component *Keyword Search Page* search features. The Global Search feature, initiated from a global search bar in the application header, provides a drop-down list for selecting a specific search category against which to run a search. The Keyword Search Page feature allows keyword-based searches from a *Keyword Search* page that appears within an administrative component. Both searches target the PeopleSoft pages and components as if you navigated directly to them while providing flexibility in searching. Data is secured so that search results return only data rows to which the user has role and permission list access. Users can choose to display the search results in list or grid format.

PeopleSoft Search Framework provides a consistent technology by which to deploy and maintain search indexes regardless of PeopleSoft application. However, each application provides and maintains its own application-specific search definitions. The Understanding PeopleSoft Search Definitions for HCM topic lists the search definitions that Oracle delivers preconfigured for PeopleSoft HCM.

PeopleSoft Search Framework References

For more information about the overview, setup, deployment, and administration of the PeopleSoft Search Framework, see *PeopleTools: PeopleSoft Search Technology* product documentation.

For information about setting up PeopleSoft Search features for HCM, see the *Configuring Global Search* task in the installation document for PeopleSoft Human Capital Management 9.2, which is available in the PeopleSoft Documentation Portal.

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Understanding PeopleSoft Search Definitions for HCM

Each PeopleSoft application provides predefined application-specific search definitions for implementation within PeopleSoft Search Framework. Tables later in these topics provide a list of the search definitions that Oracle delivers preconfigured for PeopleSoft HCM.

You can use PeopleSoft HCM global search definitions and search page (component) definitions as delivered, copy and modify them, or create new ones.

> **Note**
>
> For easier maintenance, Oracle recommends that you preserve the preconfigured application-specific search definitions as default definitions. To modify a delivered search definition, manually copy it and then modify the copy.

For information about the building blocks or objects that are associated with a search definition (query types, delete query, security type, attributes, facets, search category, and so on), and to learn how to create and implement search definitions using PeopleSoft Search Framework, refer to the *PeopleTools: Search Technology* product documentation.

To view any of the preconfigured HCM search definitions that are listed in this topic, access the Search Definition component from the Search Designer Activity guide, or from the menu navigation (**PeopleTools**, and then **Search Framework**, and then **Designer**, and then **Search Definition**).

PeopleSoft Search Considerations for HCM

When implementing PeopleSoft Search Framework for HCM, keep these general considerations in mind.

PeopleSoft HCM searches:

- Are delivered for some administrative components (Keyword Search Page searches). Some of these searches are also enabled for Global Search.
- Consider only current effective-dated rows. Incremental indexing should be run daily to index changed data into the search engine system and return most recent information. Consider the rate at which your data changes to determine the frequency for incremental indexing. For example, the Time and Absence indexes may need to be incrementally indexed multiple times in a day, whereas Succession Planning might only need to be incrementally indexed once in a quarter.
- Are based solely on the fields and values that are indexed.
- Rely on the last updated date time stamp field for incremental search indexing. (If a date time stamp field is not present in the underlying tables of a search definition, then changes to that table will not be tracked by the search engine. Date and numeric fields cannot be added as facets.)
- Allow non case-sensitive free text search.
- Accept a list of special characters in keyword search. Refer to the *Working with Search Operators in PeopleSoft Search* topic in *PeopleTools: Search Technology* for more information.

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In addition to these general considerations, each PeopleSoft HCM search definition may have its own more specific set of considerations.

HCM Roles and Permissions for PeopleSoft Search

This table lists the roles and permissions that Oracle delivers for HCM-specific PeopleSoft Search definitions.

HCM Search Definition	Role	Permission List
• Absence Request • Absence Balance	Search- Absence	HCCPAMSS1S
• Additional Pay • Garnishments • General Deductions	Search-Payroll for NA	HCCPPY1001
Applicants	• Recruiter • Recruiting Manager • Recruitment Administrator	HCCPRS1321
Career Plan	Search- Career Plan	HCCPSS3101
• Compensation History • Total Rewards	Search- Compensation	HCCPSS2131
ePerformance	Search- Performance	HCCPEP2500
Job data	Search-Job	HCCPHR3311
Job Postings	• Recruiter • Recruiting Manager • Recruitment Administrator • Hiring Manager • Applicant	HCCPRS1320
Company Directory	Search- Company Directory	HCCPSS3100
Positive Input	GP Search Administrator	HCCPGPSEARCH
Succession Plan	Search- Succession Plan	HCCPSS3102
Time	Search- Time	HCCPSS2132
Company Directory	Search- Company Directory	HCCPHR3310
Person	Search-Person	HCCPHR3312

Self-Service Related Actions

Users can perform related actions on manager and employee self-service transactions that are returned from global searches. The list of related actions vary based on the transaction to which they are associated; PeopleSoft security determines the actions a user can take on any given transaction.

While the Applicant and Job Posting transactions have their own set of Recruiting Solutions-specific related actions, the rest of the transactions present their related actions from the same list.

See PeopleSoft Talent Acquisition Manager: Understanding Global Search for Recruiting

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Global Search Related Actions

Oracle delivers related actions from many of the Global Searches. For all the searches related to Employee Self Service and Manager Self Service Transactions, the related actions are the same, or a subset of the related actions from Org Chart Viewer. For Person Global Search, the related actions point to other Administrator components. Related Actions for Applicant and Job Posting searches have a different set of related actions, specific to Recruiting Solutions transactions.

The following video provides an overview of Person Global Search:

Video: Image Highlights, PeopleSoft HCM Update Image 34: Person Global Search

Using Global Search Definitions for HCM

Tables in this topic list and describe the Global Search definitions that Oracle delivers pre-configured for the following PeopleSoft HCM modules. If considerations exist other than those listed in the PeopleSoft HCM Search Considerations topic, they are listed in the Additional Considerations column of each table.

- PeopleSoft Absence Management
- PeopleSoft Administer Workforce
- PeopleSoft eCompensation
- PeopleSoft ePerformance
- PeopleSoft Manage Base Benefits
- PeopleSoft Payroll for North America
- PeopleSoft Plan Careers and Succession
- PeopleSoft Administer Compensation
- PeopleSoft Talent Acquisition Manager
- PeopleSoft Time and Labor

With Global Search enabled, the global search bar appears in the header of the application where users can either enter keywords on which to search globally across the application or use the drop-down list for selecting a specific search category on which to search.

Watch this Video Feature Overview (VFO) on using the search capability in PeopleSoft applications:

Video: Using Search in PeopleSoft Applications

See Also

PeopleTools: Search Technology, “Working with PeopleSoft Search,” Working with Global Search.

Common Elements Used with PeopleSoft Fluid User Interface

PeopleSoft Absence Management Global Search Definitions

This table lists and describes the PeopleSoft Absence Management global search definitions that Oracle delivers pre-configured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Absence Request Search (HC_GP_ABS_RQST)	Request Details (GP_ABS_EESS_REQSTA) • **(Fluid Manager Self Service Home page)**, and then **Team Time** Select **View Requests** from navigation collection. • **(Fluid Employee Self Service Home page)**, and then **Time** Select **View Requests** from navigation collection. • **Manager Self Service**, and then **Time Management**, and then **View Time**, and then **View Requests**	Employees can enter keywords to search for and submit their own self-service absence requests and view their absence history. Managers can enter keywords to search for self-service absence requests to approve or view absence history for their direct reports. *Keyword Examples:* • Enter person's name or Empl ID • Enter department, company, or job title • Enter absence type *(Vacations* or *Sick* • % (search for all)	Only employee self-service page or manager self-service page absence requests are considered. Entries that are sourced from Extended Absence Request, Administer Workforce, or Time and Labor are not supported.
Absence Balance HC_GP_ABS_SRCH_BAL	View Absence Balances (HGA_SS_BAL_FLU) • **(Fluid Manager Self Service Home page)**, and then **Team Time** Select **Absence Balances** from navigation collection. • **(Fluid Employee Self Service Home page)**, and then **Time** Select **Absence Balances** from navigation collection. View Absence Balances (GP_ABS_MGRSS_BAL) **Manager Self Service**, and then **Time Management**, and then **View Time**, and then **Search - Absence Balance**	Employees can enter keywords to search for and view their own absence entitlement and balance. Managers can enter keywords to search for and determine absence entitlement and balance for their own direct reports. *Keyword Examples:* • Enter person's name or Empl ID • Enter job title, company, or department • % (search for all)	None

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PeopleSoft Administer Workforce Global Search Definitions

This table lists and describes the PeopleSoft Administer Workforce global search definitions that Oracle delivers pre-configured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Job Data (HC_HR_JOB_DATA)	Job Data (JOB_DATA) **Workforce Administration**, and then **Job Information**, and then **Job Data**	Any user can enter keywords to search for job information of employees. *Keyword Examples:* • Enter person's name or Empl ID • Enter department name or ID • Enter job code • Enter company name • Enter location • % (search for all)	
Company Directory (HC_HR_COMPANY_DIRECTORY1)	Company Directory • Company Directory Tile in Employee Self Service Homepage. • Company Directory Tile in Manager Self Service Homepage • **Root** , and then **Company Directory** • **(Fluid Employee Self Service Home page)**, and then **Company Directory**	Any user can enter keywords to search for employees in the Company Directory. *Keyword Examples:* • Enter person's name or Empl ID • Enter department name or ID • Enter job code • Enter company name • Enter location • % (search for all)	Only the address, phone, and email marked as *Business* in Personal information is indexed. If no business address is available, the location address from Job information is indexed.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Person HC_HR_PERSON	Modify a Person (PERSONAL_DATA) **Workforce Administration**, and then **Personal Information**, and then **Modify a Person**	Any user can enter keywords to search for Persons in the Organization. This include Employees, Persons of Interest and Contingent Workers. *Keyword Examples:* • Person's name or Employee ID • Department name or ID • Job code or Job Title • Company Name Organizational Relationship	Only the address, phone, and email marked as *Business* in Personal information is indexed. Any modification to Setup tables such as Department or Business Unit will not reflect in Search Results unless full index is run. Any modification to Email Address or Phone number will reflect in Search Result only if it is done while adding a new Person. If the current effective-dated row is deleted from job data, stale data might be returned. Employee ID change, Employee ID delete, and Employee Record delete are not supported.

PeopleSoft eCompensation Global Search Definitions

This table lists and describes the PeopleSoft eCompensation global search definitions that Oracle delivers pre-configured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Compensation History (HC_COMP_COMPENSATION_HISTORY)	View Compensation History (HR_EC_HIST_MSS_FL) **Manager Self Service**, and then **Compensation and Stock**, and then **View Compensation History** Compensation History (HR_EC_HIST_ESS_FL) **Self Service**, and then **Payroll and Compensation**, and then **Compensation History**	Employees can enter keywords to search for their own compensation details, including stop option summary. Managers can enter keywords to search for and manage compensation details about their own direct or indirect reports. Managers can also filter results based on the year when the compensation change took place, or the action that triggered the compensation change. *Keyword Examples:* • Enter person's name or Empl ID • *Active* • *Transfer* • *%* (search for all)	• Only salary history information available on the View Compensation History page is indexed. Variable compensation is not supported. • Any change to ACTION_TBL Description will not be considered. The changed value will not be reflected in search results as prior value will be existing in the last indexed data. • Currency code description in CURRENCY_CD_TBL will be taken based on effective date only. Any change to the description field will not be tracked.

PeopleSoft ePerformance Global Search Definitions

This table lists and describes the PeopleSoft ePerformance global search definitions that Oracle delivers pre-configured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Performance Documents (HC_EP_PERF_DEV)	Performance Process (EP_APPR_BASE) • **(Fluid Manager Self Service Home page)**, and then **Team Performance**, and then **Current Documents** • **Manager Self Service**, and then **Performance Management**, and then **Performance (or Development) Documents**, and then **Current Documents** • **(Fluid Employee Self Service Home page)**, and then **Performance**, and then **My Current Documents** • **Self Service**, and then **Performance Management**, and then **My Performance (or My Development) Documents**, and then **Current Documents**	Employees see the pre-filtered list of performance appraisals or development documents that are owned by them. Managers see the pre-filtered list of performance appraisals or development documents for which they are the mentor. They can also specify filter criteria to further refine search results. *Keyword Examples:* • Enter person's name • Enter document status *(Evaluation In Progress).* • Enter document type *(Development Documents).*	• Documents that have a status of cancelled or complete are not indexed. • Delegation roles of ePerformance are not supported.

PeopleSoft Manage Base Benefits Global Search Definitions

This table lists and describes the PeopleSoft Manage Base Benefits global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Health Benefit (HC_BEN_HEALTH_BENEFIT)	Health Benefits (HEALTH_BENEFITS) **Benefit**, and then **Enroll In Benefits**, and then **Health Benefits**	Users can enter keywords to search for employees' health benefit plans. *Keyword Examples:* • Enter person's name or Empl ID • Enter benefit program or benefit plan name • Enter plan type	

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PeopleSoft Payroll for North America Global Search Definitions

This table lists and describes the PeopleSoft Payroll for North America global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Create Additional Pay (HC_HPY_CREATE_ADDL_PAY)	Create Additional Pay (ADDITIONAL_PAY) • **Payroll for North America**, and then **Employee Pay Data USA**, and then **Create Additional Pay** • **Payroll for North America**, and then **Employee Pay Data CAN**, and then **Create Additional Pay** • **Payroll for North America**, and then **Employee Pay Data USF**, and then **Create Additional Pay**	Users can enter keywords to search for employees and create additional pay entries for them. *Keyword Examples:* • Enter person's name and empl ID • Enter earnings code • Enter job code, department, or business unit	
Create General Deductions (HC_HPY_GEN_DED)	Create General Deductions (GENL_DED_DATA) • **Payroll for North America**, and then **Employee Pay Data USA**, and then **Deductions**, and then **Create General Deductions** • **Payroll for North America**, and then **Employee Pay Data CAN**, and then **Deductions**, and then **Create General Deductions** • **Payroll for North America**, and then **Employee Pay Data USF**, and then **Deductions**, and then **Create General Deductions**	Users can enter keywords to search for employees and create deductions for them. *Keyword Examples:* • Enter person's name and empl ID • Enter company or deduction code	

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Review Garnishment Search (HC_HPY_REVW_GARN)	Review Garnishments (GARN_REVIEW) **Payroll for North America**, and then **Employee Pay Data USA**, and then **Deductions**, and then **Review Garnishments**	Users can enter keywords to search for employees and view their garnishments. *Keyword Examples:* • Enter person's name and empl ID • Enter company, garnishment type, and court name.	

PeopleSoft Plan Careers and Succession Global Search Definitions

This table lists and describes the PeopleSoft Plan Careers and Succession global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Career Plan (HC_HR_CAREER_PLAN)	Manage Career Plans (HR_CP_PLAN) **Manager Self Service**, and then **Career Planning**, and then **Manage Career Plans**, and then **Manage Career Plans** Career Progression Chart (HR_CP_EE_CHART) **Self Service**, and then **Career Planning**, and then **Career Progression Chart**	Employees can enter keywords to search for and view their own career progression chart. Managers can enter keywords to search for career progression charts for their own direct reports. They can also filter results by employees that report to them. *Keyword Examples:* • Enter person's name or Empl ID • Enter department name • % (search for all)	None

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Succession Planning (HC_HR_SUCC_PLAN)	Succession 360 (HR_VT_SEARCH) **Manager Self Service**, and then **Succession Planning**, and then **Succession 360**	Managers (only) can enter keywords to search for and manage succession planning for their own direct reports. *Keyword Examples:* • Enter person's name or Empl ID • Enter plan type *(Person, Position, Job Code)* • Enter plan status *(Draft, Official)* • % (search for all)	• Search results are limited to employees who are the manager's direct or indirect reports as of the current date. • If the current effective-dated row is deleted from job data, stale data might be returned. • Employee ID change, Employee ID delete, and Employee Record delete are not supported. • Changes to location or department made in correct history mode will not be indexed. Only changes that are made by adding a new effective-dated row are indexed.

PeopleSoft Administer Compensation Global Search Definitions

This table lists and describes the PeopleSoft Administer Compensation global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Compensation Total Rewards (HC_COMP_TOTALREWARDS)	Total Rewards (TRW_SS_STMT_FL) • **(Fluid Manager Self Service Home page)**, and then **View Total Rewards** • **Manager Self Service**, and then **Compensation and Stock**, and then **View Total Rewards** • **(Fluid Employee Self Service Home page)**, and then **Total Rewards** • **Self Service**, and then **Payroll and Compensation**, and then **Total Rewards**	Managers can enter keywords to search for their direct or indirect reports to view or assign compensation rewards for those employees. Employees can view their total rewards. *Keyword Examples:* • Enter person's name, Empl ID, position title, or department name • Enter reward item	None

PeopleSoft Talent Acquisition Manager Global Search Definitions

This table lists and describes the PeopleSoft Talent Acquisition Management global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Job Posting (HC_HRS_JOB_POSTING)	View Job Posting (HRS_REC_SCHJOB) **Recruiting**, and then **Postings**, and then **Search Job Postings**, and then **View Job Posting**	• Internal Applicants can enter keywords to search for job postings. • Recruiters, Recruiting managers, and Recruiting team members can enter keywords to search for job postings. *Keyword Examples:* • Enter keyword for Job Posting, for example *Java*. • Enter recruiting location as keyword.	Global Search is not exposed to external applicants.

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Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Applicant (HC_HRS_APP_INDEX)	Manage Applicant (HRS_MANAGE_APP) **Recruiting**, and then **Search Applicants**, and then **Manage Applicant**	Recruiters, Recruiting Managers, Recruitment Administrators can enter keywords to search for applicants. *Keyword Examples:* • Enter applicant location as keyword. • Enter keyword from applicant's resume.	None

PeopleSoft Time and Labor Global Search Definitions

This table lists and describes the PeopleSoft Time and Labor global search definitions that Oracle delivers pre-configured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Navigation	Usage	Additional Considerations
Time and Labor Time Sheet (HC_TL_GBL_TIMESHEET)	Timesheet (TL_MSS_EE_SRCH_PRD) • **Self Service**, and then **Time Reporting**, and then **Report Time**, and then **Timesheet** • **Manager Self Service**, and then **Time Management**, and then **Report Time**, and then **Timesheet**	Employees can enter keywords to search for their own time entry information to view or modify. Managers can enter keywords to search for any employee's time entry information. They can also search for timesheets based on report status *(Submitted)* or severity of exceptions *(High, Medium, Low)*. *Keyword Examples:* • Enter person's name or Empl ID • Enter week starting date • Enter business unit, department, job title, position, company, or location • % (search for all)	• Daily incremental indexing is recommended. • Data for only the previous 90 days is indexed. Performance is optimized by reducing huge data retrieval from Time and Labor and reducing the comparison process before deleting data from the search engine.

Understanding the Build Index Process

This topic provides overviews about:

- Parts of an Index

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- Deploying Indexes
- Building an Index
- Using Data Partitioning for High Volume Indexes

For more information about the Build Index Process, see *PeopleTools: Search Technology*.

Parts of an Index

This topic discusses:

- Queries and Search Definitions.
- Search Categories

Queries and Search Definitions

The PeopleTools Search Framework requires queries to build searches. Queries and connected queries are pre-defined for all indexes provided by PeopleSoft. Query security must be granted to the callback user defined on the Search Instance page to build and generate queries. Modifications to queries should always be well documented.

A deletion query is also provided where necessary, to synchronize indexes and transaction tables.

Queries are associated with search definitions and define all searchable portions of the data. Fields, also known as attributes, which can be used in a search, are authorized on a search definition. Some fields can be turned on or off without needing to modify the search page. This is the case with component Keyword Search and Global Search. The number of fields that are indexed can affect performance. A search definition can also be thought of as the physical index that is created.

Facets are also defined on a search definition and can be turned on or off.

> **Note**
>
> When modifying facets, or attributes, associated with a search definition you must also make similar changes to the search category. The number of facets that are indexed can affect performance.

Search Categories

Search Categories are objects that are used for searching. A search category contains a search definition or a group of search definitions also known as indexes. In order to search across multiple indexes for values, the indexes must first be combined into a single search category. Predefined search categories are provided by PeopleSoft.

> **Important**
>
> Modifications to existing search categories, facets, or attributes that are associated with a search definition is considered a minor customization and should be well documented.

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Deploying Indexes

After you define indexes, the next step in the build process is to deploy the search definition. You always deploy search definitions and you must deploy search categories that contain more than one index. Search categories with only one index, which is the same name as a search definition, are automatically deployed.

> **Warning**
>
> The Deploy Search Definitions page also allows you to delete search definitions. Deleted search definitions are not reversible.

If a category contains more than one search definition, such as HC_JPM_PROFILES, you can deploy it by following the same steps for a search definition and using the Search Categories tab. Deploying these search categories can occur before or after individual search definitions are indexed.

For more information about the Deploy Search Definitions page and the Deploy Search Category page, see the *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework", Administering Search Definitions and Search Categories.

Building an Index

To submit a search definition to be indexed, or built, use the Schedule Search Index page (**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Schedule Search Indexes**). Assign a name that reflects the index you are building. If more than one user is building a particular index, each person must create their own run control.

From the Build Search Index run control page:

- The **Search Definition** field, lookup option, lists only search definitions that have been deployed.
- The indexing type must also be selected:
  - A *full index* is a complete rebuild of an index that removes old data and applies completely new data to the index.

    For performance reasons, full indexes should not occur where there are large amounts of data.
  - An *incremental index* is used to update an existing index, remove old obsolete records, and add new records that were modified or added since the last index build.

    The indexed document retains a date and time at the header level, which is updated from various pages, transactions, and batch jobs each time the header or child record changes. If a previous build of the index has occurred, information pertaining to the last build is displayed on the run control page. Incremental indexes are typically more efficient than a full index when there is a large amount of data.

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> **Note**
>
> The Incremental Index process picks up changes to setup tables and any supporting tables that are effective dated.

- When search results change often, incremental index builds should be run nightly or whenever the system is lightly used.

  This keeps the search data current. However, there are some exceptions that require the index to be rebuilt. This can include:

  – A department name change, since the name change is not reflected in the indexes where the department is referenced.

  – Effective dated information where correction mode is used against an existing date and no new effective date is created.

> **Note**
>
> With Real Time Indexing, you may not need to use incremental builds. Refer to Understanding Real Time Indexing in HCM to see if a delivered search definition is certified for use with RTI.

For more information about the Build Search Index page, see the *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework", Working with Search Indexes.

Automated Incremental Indexing

PeopleTools release 8.62 provides the ability to automatically trigger incremental indexing based on an incremental indexing configuration, which automates incremental index processing instead of relying on manual scheduling of incremental indexing.

For additional information about incremental indexing, see *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework", Working with Search Indexes.

> **Note**
>
> To find application updates related to Automated Incremental Indexing, use the PeopleTools Features tracking group. Enter the tracking group *Automated Incremental Indexing for PT 8.62* or above.

Using Data Partitioning for High Volume Indexes

Indexing search definitions that have a large volume of data can take a long time to finish. To overcome this issue, PeopleSoft Search Framework enables you to partition the search definition data using the Index By Data Partition option on the Build Search Index page.

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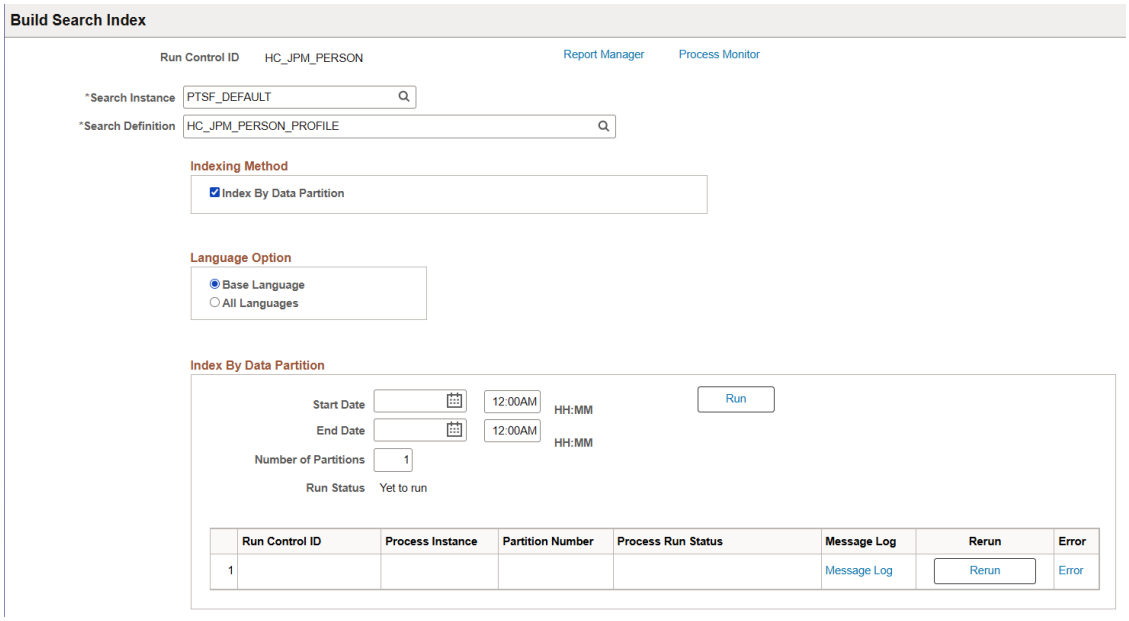
> **Note**
>
> PeopleTools 8.61 is required to use data partitioning.
>
> For additional information about data partitioning, see *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework", Working with Search Indexes.

Use the Schedule Search Index page (PTSF_SCHEDULE_SI) to submit a search definition for indexing.

Navigation:

PeopleTools, and then **Search Framework**, and then **Administration**, and then **Schedule Search Indexes**

This example illustrates the fields and controls on the Build Search Index page when a search definition is selected that is enabled for data partitioning.



From the Build Search Index run control page:

1. Assign a Run Control ID that reflects the index you are building.

   If more than one user is building a particular index, each person must create their own run control.

2. Select a search definition that is enabled for data partitioning.

   These application-specific search definitions are enabled for data partitioning:

Application	Search Definition
Job Profiles	HC_JPM_NONPERSON_PROFILE
Person Profiles	HC_JPM_PERSON_PROFILE

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3. Select Index By Data Partition, which is only available for high-volume search definitions.

> **Note**
>
> Oracle PeopleSoft does not recommend that you select the Index by Date Range Indexing Method.

4. In the **Index By Data Partition** section, enter a start and end date to select data from that range.

> **Note**
>
> You do not have to select all of your data using these dates. When using multiple run controls, you can select data in chunks, index that set using partitions, and then select a different date range. Oracle recommends that you index your most recent data first so that you can get your search definition working. Then index earlier data. Indexing by data partition is additive, meaning, it always adds more data to your index incrementally.

5. Enter a number in the **Number of Partitions** field, to specify how the system should split the data based on the entered date range.

   The system chunks the data into equal partitions.

For more information on Index By Data Partition option, see *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework", Working with Search Indexes, Partitioning Application Data in the Search Index Build Process Using Data Partition.

Understanding Real Time Indexing in HCM

Real Time Indexing (RTI) uses DirectTransfer methods to transmit search indexing data directly from PeopleSoft batch servers to the search engine. It is performed in near real-time by indexing the data as soon as it is saved.

For additional information about DirectTransfer, see *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework," Using Direct Transfer.

Related Topics

- Understanding PeopleSoft Insights Using PeopleSoft Search Framework
  This topic provides an overview about PeopleSoft Insights and discusses:
- Understanding Delivered Visualizations in HCM
  This topic provides the delivered dashboard visualizations in HCM.

Understanding RTI Switch

High volume batch updates (for search definitions enabled for RTI) can cause a sudden spike in the number of entries to process in the RTI staging table added by the database trigger. This can cause the database table fragmentation to go high and potentially slow down overall system performance.

If you have large volumes of batch updates, the RTI process should be temporarily turned off and when the batch is complete, perform catch-up updates to indexed data using incremental indexing before resuming RTI.

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RTI switch enables the application to turn OFF RTI before initializing high volume batch programs. It turns ON RTI during the incremental indexing time for a specific search definition.

> **Note**
>
> If your updates are not available in the search results or analytics after the batch is complete, you have to manually run the incremental index to enable RTI.

Batch Process	Minimum PeopleTools Release	HCM Update Image
HRS_BTCH_LET	8.59.09	Image 45
HRS_CRJOB	8.59.09	Image 45
HRS_DUPE_MERGE	8.59.09	Image 45
HRS_RESLOAD	8.59.09	Image 45
HRS_JO_SCR	8.59.09	Image 45
HRS_PRI_PLCM	8.59.09	Image 45
HR_MASS_UPD	8.59.10	Image 46
TRW_EXT_STMT	8.59.09	Image 47
WCS_CYCLOAD	8.59.09	Image 47
BAS_BARUN_RT	8.59.09	Image 48
BAS_BAS04_RT	8.59.09	Image 48
BAS_BAS05_RT	8.59.09	Image 48
BAS_CONFSTMT	8.59.09	Image 48

> **Note**
>
> Oracle's PeopleSoft recommend that you do not change the Configure Batch switch without a complete understanding of how it works, because batch processes must be specifically coded to reference the RTI Switch.

For additional information about RTI Switch, see *PeopleTools: Search Technology,* "Administering Real-Time Indexing" documentation.

Search Definition for Real Time Indexing

PeopleSoft delivers search definitions that you can implement for RTI. PeopleSoft Applications Development plans to deliver more search definitions for RTI in future images.

RTI can be used on search definitions listed in this table when the minimum tools release is in effect for the respective Update Image.

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> **Warning**
>
> Oracle recommends that you do not implement RTI for any other search definition in the PeopleSoft application at this time. The PeopleSoft system does not support RTI for any other search definition other than those listed in this table.

Search Definition	Minimum PeopleTools Release	HCM Update Image
HC_HR_JOB_DATA	8.59.07	Image 42
HC_HR_PERSON	8.59.07	Image 42
HC_TL_GBL_PAYABLETIME	8.59.07	Image 42
HC_TL_GBL_PAYABLETIME_EXCPTN	8.59.07	Image 42
HC_HRS_APP_INDEX	8.59.11	Image 43
HC_HRS_APPLICANT	8.59.11	Image 43
HC_HRS_JOB_OPENING	8.59.10	Image 43
HC_HRS_JOB_POSTING	8.59.10	Image 43
HC_HRS_RCMNT_ALL	8.59.10	Image 43
HC_JPM_NONPERSON_PROFILE	8.59.05	Image 43
HC_HRS_RECRUITER_RCMNT_ALL	8.59.10	Image 43
HC_TL_GBL_TIMESHEET	8.59.06	Image 43
HC_TL_GBL_TIMESHEET_SCHEDULE	8.59.09	Image 43
HC_BEN_ADMINERR_DATA	8.59.09	Image 44
HC_BEN_APPR_DATA	8.59.09	Image 44
HC_BEN_ATTACH_DATA	8.59.09	Image 44
HC_BEN_EOI_DATA	8.59.09	Image 44
HC_BEN_LE_DATA	8.59.09	Image 44
HC_GP_ABS_RQST	8.59.11	Image 44
HC_HR_RWHIS_MGR_IDX	8.59.10	Image 44
HC_HR_RWORK_INDEX	8.59.10	Image 44
HC_HR_RWORK_MGR_IDX	8.59.10	Image 44
HC_HR_RWORKHIS_ADM_IDX	8.59.10	Image 44
HC_JPM_PERSON_PROFILE	8.59.10	Image 44
HC_HS_EMPL_TEST_DATA	8.59.13	Image 45
HC_HS_EMPL_VACC_DATA	8.59.13	Image 45
HC_HS_INCIDENT_DATA	8.59.10	Image 45
HC_HR_RW_EMP_VACC_INDEX	8.59.10	Image 45
HC_HR_WF_DIVERSITY	8.59.10	Image 45
HC_BEN_OE_APPR	8.59.09	Image 46
HC_BEN_OE_ATTACH	8.59.09	Image 46
HC_BEN_OE_CURR	8.59.09	Image 46

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Search Definition	Minimum PeopleTools Release	HCM Update Image
HC_BEN_OE_ENROLL	8.59.09	Image 46
HC_BEN_OE_EOI	8.59.09	Image 46
HC_EP_PERFORMANCE_ADM	8.59.10	Image 48
HC_EP_PERFORMANCE_MGR	8.59.10	Image 48
HC_POSITION_DATA_INDEX	8.59.22 or 8.61.01 or 8.60.11 or higher	Image 48
HC_EP_PERFORM_ITEM_MGR	8.60.11	Image 49
HC_HR_ONBOARDING_ADM	8.61.03A	Image 49
HC_HR_ONBOARDING_MGR	8.61.03A	Image 49
HC_EP_PERF_RATINGS_MGR	8.60.11	Image 50
HCSC_APRV_INSIGHTS	8.59.10	Image 51
HCSC_APR_ADM_INSIGHTS	8.62.06	Image 55
HC_HR_WF_METRIC	8.59.04	Image 55

> **Note**
>
> Search definitions that are enabled for RTI prior to PeopleTools 8.59.10 are not certified for multiple languages. RTI only indexes changes made in the base language. When your system upgrades to PeopleTools 8.59.10, any index that is certified for use in the table above is certified for multiple language situations.

Steps to Build Real Time Indexes

To build Real Time Indexes:

1. Perform a full index build of the indexes that you will use.

   This allows a baseline index for RTI to add records.

2. Enable RTI on the search definition using the Configure Real Time Indexing page (**PeopleTools**, and then **Search Framework**, and then **Real Time Indexing**, and then **Configure Real Time Indexing**).

   a. On the search page that appears, look up the search definition (from the list above) using search fields and select Search. Select the correct row from the search results.

   b. On the next page where the selected search definition is displayed, select the Enable Real Time Indexing check box.

3. If the Configure Batch check box is already selected, a list of selected batch jobs for RTI enabled transactions are displayed.

   Use the Document Count field to set a minimum threshold beyond which RTI is disabled for the selected trigger records. Use the Honor Batch Switch to decide which processes (batch programs) honor the RTI batch switch.

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> **Note**
>
> PeopleSoft Applications delivers a list of batch jobs that disables RTI if the number of records to be processed adversely affects RTI performance. These batch jobs are added to the Configure RTI page. Based on system demands, administrators can set a minimum threshold to determine when the batch job disables RTI.

4. Save the page.
5. Download the trigger SQL for your database environment using the Trigger SQL link.

   MSS, DB2 z/OS, and Oracle are supported.

> **Note**
>
> When you click the link, trigger SQL is generated for each supported database platform. Based on the browser you use, you may receive a prompt to Save the file or Cancel. Click Cancel if the prompt is for a Database platform that is different from what you use, and the next database platform's SQL is generated.

6. Provide the trigger to your database administrator to apply to the database.

> **Warning**
>
> Any time a change is made to the RTI configuration using the Configure Real Time Indexing page, or using PeopleCode in the application class, and whether or not a new trigger is generated and applied, the process scheduler must be restarted. If you do not restart the process scheduler, real time indexing may not pick up the changes and could fail to index your data.

For additional information about configuring Real Time Indexing, see *PeopleTools: Search Technology*, "Administering Real Time Indexing."

Understanding PeopleSoft Insights Using PeopleSoft Search Framework

This topic provides an overview about PeopleSoft Insights and discusses:

- Insights Catalog Tile
- PeopleSoft Insights, Search Definitions, and Privileges
- Deploying PeopleSoft Insights Dashboards
- PeopleSoft Insights in WorkCenters

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.

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Dashboard administrators use PeopleSoft Insights and the underlying analytics engine to create both dashboards and visualizations. Dashboards objects, which contain one or more visualizations, are imported into PeopleSoft.

Typically, a PeopleSoft user who has the *Search Administrator* role performs these tasks:

- Imports dashboards.
- Configures dashboards as tiles or related information.
- Specifies user privileges for the dashboard.

  End users access dashboards based on user privileges.
- Deploys dashboards.

> **Important**
>
> Oracle recommends that you do not modify or edit a delivered dashboard or visualization. You may copy a delivered visualization and then modify it as per your business requirements.

For more information, see *PeopleTools: Search Technology*, "Working with Insights Dashboards for PeopleSoft Application Data," Understanding Application Data and Insights Dashboards.

Insights Catalog Tile

PeopleSoft HCM provides administrators and managers direct access to a collection of HCM Insights dashboards.

Administrators and managers use the Insights Catalog tile to access the Insights Catalog navigation collection for HCM.

> **Note**
>
> You must be assigned the *EOIC Insights Catalog* role to access the Insights Catalog tile.

Navigation:

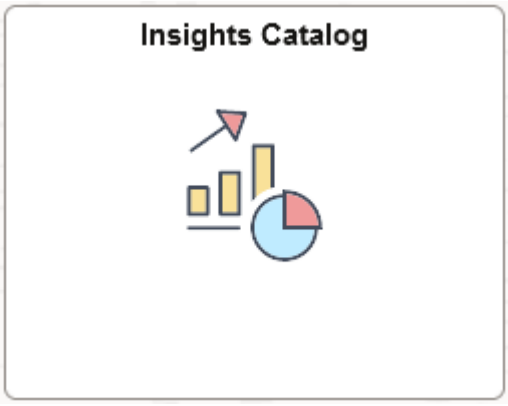
The Insights Catalog tile is delivered as part of the following homepages:

- Manager Self Service Homepage
- Workforce Administrator Homepage
- Talent Administrator Homepage
- Recruiting Homepage

The Insights Catalog tile is delivered as part of the PeopleSoft Landing Page - My Work Section and Manage People and Jobs Dashboard of the PeopleSoft Landing Page.

This example illustrates the Insights Catalog tile.

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Select the tile to access the Insights Catalog navigation collection.

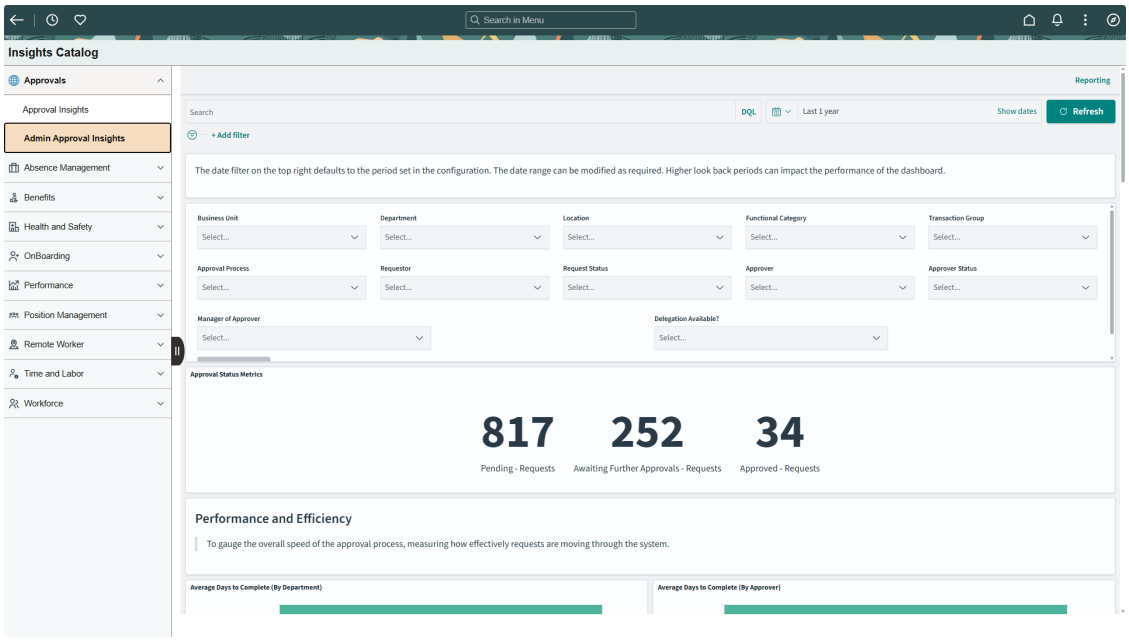
Insights Catalog Navigation Collection

Use the Insights Catalog navigation collection to access a collection of HCM Insights dashboards for HCM.

Navigation:

Select the Insights Catalog Tile.

This example illustrates the Insights Catalog navigation collection.



Video: Image Highlights, PeopleSoft HCM Update Image 49: PeopleTools 8.61 Updates

This navigation collection enables administrators to access HCM Insights from one location. The left panel of this page lists the Insight dashboards (catalog items) collected under the following categories:

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- Approvals
- Absence Management
- Benefits
- Global Payroll
- Health and Safety
- OnBoarding
- Payroll for North America
- Performance
- Position Management
- Recruiting
- Remote Worker
- Time and Labor
- Workforce

The right panel displays the Insights dashboard selected in the left panel.

Catalog items (dashboards) are listed in the PeopleSoft Insights, Search Definitions, and Privileges section that follows.

PeopleSoft Insights, Search Definitions, and Privileges

This topic discusses Insights tiles and navigation collection, search definitions, and system-delivered roles.

Tiles and Navigation Collection

When an Insights tile is selected, it opens an Insights dashboard.

Insights Catalog is a navigation collection used to display all the Insights dashboards delivered in HCM. Each catalog item in the Insights Catalog is an Insights dashboard.

Search Definitions

PeopleSoft Insights display analytics built from Search Indexes built through Search Framework. The data source for PeopleSoft Insights is search definition(s).

PeopleSoft search definitions are delivered for HCM Insights catalog items (navigation collection), dashboards, global search, and component keyword search. Use the appropriate search definition to build your indexes. Keep in mind that search definitions must be deployed before you can build the index.

System-Delivered Roles

User roles are required to access the PeopleSoft Insights dashboards. Refer to the table below to see roles associated to each search definition.

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> **Note**
>
> Depending on how you access the dashboard (either from the Insights Catalog or a tile), different roles may be required. When a generic role is used to secure an Insights dashboard (for example, *HR Administrator*), the Insights Catalog Item is secured by an Insights specific role (in this example, *Ins Cat Position Insights*).

For more information about assigning privileges, see the "Specifying User Privileges" subtopic within the *PeopleTools: Search Technology,* "Working with Insights Dashboards for PeopleSoft Application Data," Creating a Visualization for Application Data documentation.

The following tables list the PeopleSoft search definitions and user roles defined for HCM Insights dashboards.

Approvals

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Approval Insights	Approval Insights Dashboard (for Managers)	HCSC_APRV_INSIGHTS	Manager
Admin Approval Insights	Admin Approval Insights Dashboard	HCSC_APR_ADM_INSIGHTS	(Catalog Item and Tile) Ins Cat Admin Approval Insight (Tile) HR Administrator

Absence Management

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Absence Event Insights	PeopleSoft Absence Management: Absence Event Insights Dashboard	HC_GP_ABS_RQST	Absence Insights Administrator
Processed Absence Insights	PeopleSoft Absence Management: Processed Absence Insights Dashboard	HC_HGA_PROCESSED_ABS, HC_HGA_PI_GEN and HC_HGA_BALANCE_TRENDS	Absence Insights Administrator

Benefits

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Ben Admin Processing Insights	PeopleSoft Benefits Administration: Benefits Admin Processing Insights Dashboard	HC_BEN_ADMINERR_DATA	Benefits Analyst Benefits Analytics Admin

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Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Benefits Utilization	PeopleSoft Benefits Administration: Benefits Utilization Dashboard	HC_BEN_BENEFIT_DEP, HC_BEN_BENEFIT_EE, HC_BEN_BENEFIT_HST2	Benefits Analyst Benefits Analytics Admin
Life Events Insights	PeopleSoft Benefits Administration: Life Events Insights Dashboard	HC_BEN_LE_DATA, HC_BEN_ATTACH_DATA, HC_BEN_APPR_DATA, HC_BEN_EOI_DATA, HC_BNE_LIFEEVT_EXPIRE	Benefits Analyst Benefits Analytics Admin
Open Enrollment Insights	PeopleSoft Benefits Administration: Open Enrollment Insights Dashboard	HC_BEN_OE_AG HC_BEN_OE_APPR, HC_BEN_OE_ATTACH, HC_BEN_OE_CURR, HC_BEN_OE_ENROLL, HC_BEN_OE_EOI	Benefits Analyst Benefits Analytics Admin

Global Payroll

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) Global Payroll Insights (Tile) Global Payroll Cost Analytics	PeopleSoft Global Payroll: Global Payroll Insights (Cost Analytics) Dashboard	GP_KIB_ED_GN_SRCH GP_KIB_ERN_DED_GN	(Catalog Item and Tile) Fluid Dashboard- ESS GP (Tile) GP Administrator
Global Payroll Operations	PeopleSoft Global Payroll: Global Payroll Operations Dashboard	GP_KIB_OPER_SRCH_FULL GP_KIB_OPER_SRCH_INCR	(Catalog Item and Tile) Fluid Dashboard- ESS GP (Tile) GP Administrator
Global Payroll Trends	PeopleSoft Global Payroll: Global Payroll Trends Dashboard	GP_KIB_OP_TREND_SRCH	(Catalog Item and Tile) Fluid Dashboard- ESS GP (Tile) GP Administrator

Health and Safety

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) Incident Insights (Tile) Incident Analytics	PeopleSoft Human Resources Monitor Health and Safety: Incident Analytics Dashboard	HC_HS_INCIDENT_DATA	(Catalog Item) Ins Cat Health and Safety (Tile) Health and Safety ADM Fluid

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Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) Test Insights (Tile) Test Analytics	PeopleSoft Human Resources Monitor Health and Safety: Test Analytics Dashboard	HC_HS_EMPL_TEST_DATA	(Catalog Item) Ins Cat Health and Safety (Tile) Health and Safety ADM Fluid
(Catalog Item) Vaccination Insights (Tile) Vaccination Analytics	PeopleSoft Human Resources Monitor Health and Safety: Vaccination Analytics Dashboard	HC_HS_EMPL_VACC_DATA	(Catalog Item) Ins Cat Health and Safety (Tile) Health and Safety ADM Fluid

OnBoarding

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) OnBoarding Insights (Tile) OnBoarding Insight	PeopleSoft Human Resources Administer Workforce: OnBoarding Insight Dashboard (for Administrators)	HC_HR_ONBOARDING_ADM	(Catalog Item) Ins Cat OnBoarding Adm (Tile) OnBoarding Administrator
(Catalog Item) OnBoarding Manager Insights (Tile) OnBoarding Manager Insight	PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Insight Dashboard (for Managers)	HC_HR_ONBOARDING_MGR	(Catalog Item) Ins Cat OnBoarding Mgr (Tile) OnBoarding Manager

Payroll for North America

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) U.S. Payroll Cost Insights (Tile) U.S. Payroll Cost	PeopleSoft Payroll for North America: U.S. Payroll Cost Insights Dashboard	HC_HPY_MGMT_CHK_US, HC_HPY_CAT_US	NA Payroll Cost Analytics US
(Catalog Item) Canada Payroll Cost Insights (Tile) Canada Payroll Cost	PeopleSoft Payroll for North America: Canada Payroll Cost Analytics Dashboard	HC_HPY_MGMT_CHQ_CAN, HC_HPY_CAT_CAN	NA Payroll Cost Analytics CAN
(Catalog Item) Canada Payroll Operations (Tile) Canada Payroll Operation	PeopleSoft Payroll for North America: Canada Payroll Operations Analytics Dashboard	HC_HPY_OPER_CAL_CAN, HC_HPY_OPER_EXC_CAN, and HC_HPY_OPER_RET_CAN	NA Payroll Operations CAN

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Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) Canada Payroll Trends Insights (Tile) Canada Payroll Trends	PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Dashboard PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Breakdown Dashboard	HC_HPY_CT2_CAN, HC_HPY_MGMT_CHQ_CAN, and HC_HPY_OPER_CAL_CAN	NA Payroll Trends CAN
(Catalog Item) U.S. Payroll Operations (Tile) U.S. Payroll Operation	PeopleSoft Payroll for North America: U.S. Payroll Operations Analytics Dashboard	HC_HPY_OPER_CAL_US, HC_HPY_OPER_EXC_US, and HC_HPY_OPER_RET_US	NA Payroll Operations US
(Catalog Item) U.S. Payroll Trends Insights (Tile) U.S. Payroll Trends	PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Dashboard PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Breakdown Dashboard	HC_HPY_CT2_US, HC_HPY_MGMT_CHK_US, and HC_HPY_OPER_CAL_US	NA Payroll Trends US
U.S. Year-End Trends Insight	PeopleSoft Payroll for North America: U.S. Year-End Trends Dashboard	HC_HPY_YEAR_END_W2_CONSENT, HC_HPY_YEAR_END_BOX_US, and HC_HPY_YEAR_END_FMS_US	NA Payroll YE Analytics US
U.S. Year-End Audit Insight	PeopleSoft Payroll for North America: U.S. Year-End Audit Dashboard	HC_HPY_W2_YEDATA_LD_US, HC_HPY_YE_FMS_W2C_DTLS_US, HC_HPY_YE_W2C_FMS_US, HC_HPY_AUDT_ERR_US, and HC_HPY_US_YE_AUDIT_FLTR	NA Payroll YE Analytics US

Performance

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Document Insights	PeopleSoft ePerformance: Document Insights Dashboard	HC_EP_PERFORMANCE_ADM	(Catalog Item) Ins Cat ePerf Admin (Tile) ePerformance HR Admin
Performance Insights	PeopleSoft ePerformance: Performance Insights Dashboard	HC_EP_PERFORMANCE_ADM	(Catalog Item) Ins Cat ePerf Admin (Tile) ePerformance HR Admin

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Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Team Document Insights	PeopleSoft ePerformance: Team Document Insights Dashboard	HC_EP_PERFORMANCE_MGR	(Catalog Item) Ins Cat ePerf Manager (Tile) Fluid Dashboard - MSS ePerf
Team Performance Insights	PeopleSoft ePerformance: Team Performance Insights Dashboard	HC_EP_PERFORMANCE_MGR HC_EP_PERFORM_ITEM_MGR	(Catalog Item) Ins Cat ePerf Manager (Tile) Fluid Dashboard - MSS ePerf
Team Rating Insights	PeopleSoft ePerformance: Team Rating Insights Dashboard	HC_EP_PERF_RATINGS_MGR	ePerformance MGR Team Ratings

Position Management

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Position Management Insights	PeopleSoft Human Resources Manage Positions: Position Management Insights Dashboard	HC_POSITION_DATA_INDEX	(Catalog Item) Ins Cat Position Insights (Tile) HR Administrator

Recruiting

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Application Details	PeopleSoft Talent Acquisition Manager: Application Details Insights Dashboard	HC_HRS_APP_INDEX	(Catalog Item) Ins Cat Application Insights (Tile) • Recruiter Fluid • Recruiting Manager Fluid • Recruitment Admin Fluid
(Catalog Item) In Process Applications (Tile) In Process Applications	In Process Applications Dashboard (See PeopleSoft Talent Acquisition Manager: Viewing Recruiting Insights and PeopleSoft Talent Acquisition Manager: Recruiter Pipeline Dashboard)	HC_HRS_RECRUITER_RCMNT_ALL	(Catalog Item) Ins Cat In Process Application (Tile) • Recruiter Fluid • Recruiting Manager Fluid • Recruitment Admin Fluid

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Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Recruiter Pipeline (Tile is under both the Recruiting homepage and Recruiting Insight dashboard)	PeopleSoft Talent Acquisition Manager: Recruiter Pipeline Dashboard	HC_HRS_RECRUITER_RCMNT_ALL HC_HRS_JOB_OPENING	(Catalog Item) Ins Cat Application Insights (Tile) • Recruiter Fluid • Recruiting Manager Fluid • Recruitment Admin Fluid
Recruitment Admin Dashboard (Tile is under both the Recruiting homepage and Recruiting Insight dashboard)	PeopleSoft Talent Acquisition Manager: Recruitment Admin Dashboard	HC_HRS_RCMNT_ALL HC_HRS_JOB_OPENING	(Catalog Item) Ins Cat Recruitment Admin (Tile) Recruitment Admin Fluid

Remote Worker

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
(Catalog Item) Remote Worker Admin Insight (Tile) Remote Worker	PeopleSoft Human Resources Administer Workforce: Remote Worker Insights Dashboard (for Administrators)	HC_HR_RWORK_INDEX HC_HR_RWORKHIS_ADM_IDX	(Catalog Item) Ins Cat Remote Worker Admin (Tile) Fluid Remote Worker Admin
(Catalog Item) Remote Worker Manager Insight (Tile) Remote Worker Dashboard	PeopleSoft Human Resources Administer Workforce: Remote Worker Dashboard (for Managers)	HC_HR_RWORK_MGR_IDX HC_HR_RWHIS_MGR_IDX	(Catalog Item) Ins Cat Remote Worker Manager (Tile) Fluid Remote Worker Manager

Time and Labor

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Payable Time Insight	PeopleSoft Time and Labor: Payable Time Insights Dashboard	HC_TL_GBL_PAYABLETIME	(Catalog Item) Ins Cat TL Insights (Tile) TL Manager Time Fluid
Payable Time Trend	PeopleSoft Time and Labor: Payable Time Trend Dashboard	HC_TL_GBL_PAYABLETIME_EXCPTN	(Catalog Item) Ins Cat TL Insights (Tile) TL Administrator Fluid
Reported Time Insight	PeopleSoft Time and Labor: Reported Time Insight Dashboard	HC_TL_GBL_TIMESHEET HC_TL_GBL_TIMESHEET_SCHEDULE	(Catalog Item) Ins Cat TL Insights (Tile) • TL Administrator Fluid • TL Manager Time Fluid

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Workforce

Catalog Item/Tile Name	Insights Dashboard Name	Search Definition	Catalog Item/Tile Role(s)
Current Headcount Insight	PeopleSoft Human Resources Administer Workforce: Current Headcount Insights Dashboard	HC_HR_WF_METRIC	HR Analytics Administrator
Workforce Composition	PeopleSoft Human Resources Administer Workforce: Workforce Composition Dashboard	HC_HR_PERSON	Workforce Composition Admin
Workforce Equity	PeopleSoft Human Resources Administer Workforce: Workforce Equity Dashboard	HC_HR_WF_DIVERSITY	HR Analytics Administrator

Real Time Indexing

Real Time Indexing (RTI) uses DirectTransfer methods to transmit search indexing data directly from PeopleSoft batch servers to the search engine. It is performed in near real-time by indexing the data as soon as it is saved.

For more information on RTIs and a list of HCM search definitions that use them, see Understanding Real Time Indexing in HCM.

Deploying PeopleSoft Insights Dashboards

Use the Deploy Insights Dashboards page to deploy Insights dashboards and tiles. For more information about the Deploy Insights Dashboards page, see *PeopleTools Search Technology:* “Working with Insights Dashboards for PeopleSoft Application Data”, Managing a Delivered Dashboard.

> **Note**
>
> Before you deploy a dashboard, you must ensure that the prerequisites of installing and setting up PeopleTools, OpenSearch, and Insights are completed. You must also ensure that the required search definitions are deployed and indexed successfully because component searches are visualizations in Insights are based on the indexes in the Search Framework.

For more information on building indexes, see the *PeopleTools Search Technology:* "Administering PeopleSoft Search Framework," Working with Search Indexes.

PeopleSoft Insights Search Using Global Search

Users can look up PeopleSoft Insights dashboards or visualizations by title, description, and panel label using the *Insights* search category of the Global Search bar.

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As you enter search keywords, Search Framework displays the title and description of matching dashboard suggestions in the drop-down list that appears as well as on the Search Results page (when you select the **Search** button).

For more information about using Global Search, see *PeopleTools: Search Technology*, "Working with PeopleSoft Search," Working with Global Search.

See Also Common Elements Used with PeopleSoft Fluid User Interface.

PeopleSoft Insights in WorkCenters

Fluid WorkCenters provide access to product-specific PeopleSoft Insights dashboards.

Embedded under **My Insights** on the left panel, users with appropriate insights dashboard permissions can access the insights dashboards directly from these WorkCenters:

- PeopleSoft Benefits Administration: Benefits WorkCenter Page.
- PeopleSoft Payroll for North America: Canadian Payroll WorkCenter Page.
- PeopleSoft Global Payroll: Global Payroll WorkCenter Page.
- PeopleSoft Payroll for North America: U.S. Payroll WorkCenter Page.
- PeopleSoft Time and Labor: Time and Labor WorkCenter Page.

Understanding Delivered Visualizations in HCM

This topic provides the delivered dashboard visualizations in HCM.

This topic breaks the delivered visualizations into these product categories:

- Core Functionality
- Workforce Data Management
- Workforce Development
- Compensation Management
- Budgets and Requirements Administration
- Self-Service Applications
- Time and Pay
- Global Payroll
- Recruiting Solutions

For a list of roles to access these visualizations, see Understanding PeopleSoft Insights Using PeopleSoft Search Framework.

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Core Functionality

This section lists the delivered visualizations for core functionality:

Approvals

Visualizations	Dashboard	Search Definition	Image Added
<Approval Status> Requests (number counts) • Pending • Approved • Denied • Terminated • Cancelled • Pushed Back Rollup of Pending Approval Requests Pending Approval Requests by Approver Count of Open Approval Requests Open Approval Request Details Approval Requests by Functional Category Approval Requests by Transaction Average Time to Complete Transactions Pending Approval Approval Request Trend by Transaction	Approval Insights Dashboard (for Managers)	HCSC_APRV_INSIGHTS	Image 51

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Visualizations	Dashboard	Search Definition	Image Added
Approval Status Metic • Pending Requests • Awaiting Further Approvals - Requests • Complete - Requests • Approved - Requests • Cancelled - Requests • Denied - Requests • Terminated - Requests Average Days to Complete (By Department) Average Days to Complete by Approver Pending Requests Monthly Approval Request Submission by Department (Rolling One Year Basis) Top Approval Processes Approval Request Submission Over Time Pending Approval Requests by Manager Denied Requests by Department	Admin Approval Insights Dashboard	HCSC_APR_ADM_INSIGHTS	Image 55

Workforce Data Management

This section lists the delivered visualizations for:

- Human Resources Administer Workforce
- Human Resources Position Management

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Human Resources Administer Workforce

Visualizations	Dashboard	Search Definition	Image Added
Headcount Data • Cureent Headcount • Employee - Headcount • Contingent Worker - Headcount • Person of Interest - Headcount Demographics • Average Age • Service Tenure by Range • Headcount by Regular vs. Temporary • Headcount by Full-Time vs. Part-Time • Headcount by Gender • Headcount by Employee Type • Top Reasons for Leave of Absence Distribution • Distribution by Payroll Status • Distribution by Department • Headcount Distribution by Location	PeopleSoft Human Resources Administer Workforce: Current Headcount Insights Dashboard	HC_HR_WF_METRIC	Image 54
Completion Status Duration to Complete In-Progress by Days Open Step Status Step Duration Overdue Status Overdue Steps	PeopleSoft Human Resources Administer Workforce: OnBoarding Insight Dashboard (for Administrators)	HC_HR_ONBOARDING_ADM	Image 49
Completion Status Duration to Complete In-Progress by Days Open Overdue Status Overdue Steps	PeopleSoft Human Resources Administer Workforce: OnBoarding Manager Insight Dashboard (for Managers)	HC_HR_ONBOARDING_MGR	Image 49

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Visualizations	Dashboard	Search Definition	Image Added
Visualizations delivered in image 40: • Total Employee Population • Remote worker number counts by type: – Fully Remote - Employees – Hybrid - Employees – Onsite - Employees • Remote Worker Distribution Percentage • Remote Work Location • Employee Distribution by Department • Remote Work Percent • Hybrid Remote Work Days Visualizations delivered in image 44: • Remote Work Reasons • Remote Work Eligibility • Remote Location by State • Remote Location by Postal Code • Remote Requests History Visualization delivered in image 45: Vaccination Status	PeopleSoft Human Resources Administer Workforce: Remote Worker Insights Dashboard (for Administrators)	HC_HR_RWORK_INDEX HC_HR_RWORKHIS_ADM_IDX	Image 40 Image 44 Image 45
Employees by Department Employee Count Full-Time Vs Part-Time Regular Vs Temporary Employee Distribution by Country	PeopleSoft Human Resources Administer Workforce: Workforce Composition Dashboard	HC_HR_PERSON	Image 34

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Visualizations	Dashboard	Search Definition	Image Added
Employees by Ethnic Group Employees by Gender Compa-Ratio by Age and Gender Compa-Ratio by Department Employees by Job Title Employee Distribution by Country	PeopleSoft Human Resources Administer Workforce: Workforce Equity Dashboard	HC_HR_WF_DIVERSITY	Image 34

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Human Resources Manage Positions

Visualizations	Dashboard	Search Definition	Image Added
Position Metrics • Total Positions (number count) • Open - Position (number count) • Partially Filled - Position (number count) • Filled - Position (number count) • Overallocated - Position (number count) • Eligible for Remote Work (number count) • Full-Time vs Part-Time Positions • Regular vs Temporary Positions • Position Filled Statuses • Open vs partially filled position by Department • Position Without Manager Position Headcount Metrics • Positions Total Head Count (number count) • Positions Open Head Count (number count) • Positions Open Headcount by Department • Positions Open Headcount by Title Approval Status of Position Requests • Days Approval In Progress • Pending Approval Status	PeopleSoft Human Resources Manage Positions: Viewing Position Management Insights	HC_POSITION_DATA_INDEX	Image 48

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Workforce Development

This section lists the delivered visualizations for ePerformance:

ePerformance

Visualizations	Dashboard	Search Definition	Image Added
Document Status Document status metrics Document Status by Department Document Status by Location Overdue Steps	PeopleSoft ePerformance: Document Insights Dashboard (for Administrators)	HC_EP_PERFORMANCE_ADM	Image 46
Employee Performance Performance by Time in Position Compa-Ratio by Performance	PeopleSoft ePerformance: Performance Insights Dashboard (for Administrators)	HC_EP_PERFORMANCE_ADM	Image 46
Documents by Review Status Document status metrics Document Status by Department Document Status by Location Overdue Steps	PeopleSoft ePerformance: Team Document Insights Dashboard (for Managers)	HC_EP_PERFORMANCE_MGR	Image 46
Employee Performance Compa-Ratio by Performance Performance by Time in Position Progress on Employee Goals Progress on Competencies	PeopleSoft ePerformance: Team Performance Insights Dashboard (for Managers)	HC_EP_PERFORMANCE_MGR HC_EP_PERFORM_ITEM_MGR	Image 46 Image 49

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Compensation Management

This section lists the delivered visualizations for Benefits Administration.

Benefits Administration

Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Schedule IDs Benefits Schedule Summary	PeopleSoft Benefits Administration: Benefits Admin Processing Insights Dashboard	HC_BEN_ADMINERR_DATA	Image 44
Employees by Plan Category Employees by Plan Type Enrolled vs Waived Dependents Covered Plan Migration as of January 1 Benefits - by State	PeopleSoft Benefits Administration: Benefits Utilization Dashboard	HC_BEN_BENEFIT_DEP HC_BEN_BENEFIT_EE HC_BEN_BENEFIT_HST2	Image 39
Active Life Events Missing Attachments Pending Approvals EOI Proofs Missing Life Event Types Life Events Steps	PeopleSoft Benefits Administration: Life Events Insights Dashboard	HC_BEN_LE_DATA, HC_BEN_ATTACH_DATA, HC_BEN_APPR_DATA, HC_BEN_EOI_DATA, HC_BNE_LIFEEVT_EXPIRE	Image 44

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Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Active Life Events Missing Attachments Pending Approvals EOI Proofs Missing Life Event Types Life Events Steps Schedule ID Days Until Open Enrollment Period Ends Unsubmitted Enrollments Submitted vs Unsubmitted Submission Status by Department Missing Attachments (count) Missing Attachments Pending Approvals (count) Pending Approvals Missing EOI Proofs (count) Missing EOI Proofs Open Enrollment Steps Updated as of Open Enrollment Steps	PeopleSoft Benefits Administration: Open Enrollment Insights Dashboard	HC_BEN_OE_AG HC_BEN_OE_APPR, HC_BEN_OE_ATTACH, HC_BEN_OE_CURR, HC_BEN_OE_ENROLL, HC_BEN_OE_EOI	Image 46

Budgets and Requirements Administration

This section lists the delivered visualizations for Health and Safety.

Health and Safety

Visualizations	Dashboard	Search Definition	Image Added
Incidents by Type Incidents by Date Incidents by Location Incident Types Reportable Cases Work-Related Primary Outcome and Treatment Received	PeopleSoft Human Resources Monitor Health and Safety: Incident Analytics Dashboard	HC_HS_INCIDENT_DATA	Image 37

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Visualizations	Dashboard	Search Definition	Image Added
Test Results by Test Test Locations Test Methods Test History Tests by Work Location Tests by Department	PeopleSoft Human Resources Monitor Health and Safety: Test Analytics Dashboard	HC_HS_EMPL_TEST_DATA	Image 41
Vaccination Status by Vaccine Vaccination Locations Vaccines Declined by Reason Vaccination Status by Age Groups Vaccination Status by Current Sex Vaccination History Vaccinations by Work Location Vaccinations by Department	PeopleSoft Human Resources Monitor Health and Safety: Vaccination Analytics Dashboard	HC_BEN_LE_DATA HC_BEN_ATTACH_DATA HC_BEN_APPR_DATA HC_BEN_EOI_DATA HC_BNE_LIFEEVT_EXPIRE	Image 44

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Self-Service Applications

This section lists the delivered visualizations for eProfile Manager Desktop:

eProfile Manager Desktop

Visualizations	Dashboard	Search Definition	Image Added
Visualizations delivered in image 42: • Total Employees • Remote worker number counts by type: – Fully Remote - Employees – Hybrid - Employees – Onsite - Employees • Remote Worker Distribution Percentage • Remote Work Percent • Employee Distribution by Department • Remote Work Location • Hybrid Remote Work Days Visualizations delivered in image 44: • Remote Work Eligibility • Remote Work Reason • Remote Requests History	PeopleSoft Human Resources Administer Workforce: Remote Worker Dashboard (for Managers)	HC_HR_RWORK_MGR_IDX HC_HR_RWHIS_MGR_IDX	Image 42 Image 44

Time and Pay

This section lists the delivered visualizations for:

- Absence Management
- Payroll for North America
- Time and Labor

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Absence Management

Visualizations	Dashboard	Search Definition	Image Added
Absence by Type and Name Absence By Approval Status Absence Division Trend Absence by Department Absence by Calendar Year Yearly Absence Comparison Absence Type Tag Cloud	PeopleSoft Absence Management: Absence Event Insights Dashboard	HC_GP_ABS_RQST	Image 38
Absence by Paid Status Actual Absence Cost processed via Positive Input Estimated Cost of Processed Absence by Department Negative Balance Hours Absence Entitlement Balance and Trends	PeopleSoft Absence Management: Processed Absence Insights Dashboard	HC_HGA_PROCESSED_ABS HC_HGA_PI_GEN HC_HGA_BALANCE_TRENDS	Image 44

Payroll for North America

Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Total Payroll Cost Actual Trends Employees Paid Cost by Category Payroll Distribution by Province Earnings by Category Taxes by Category Deductions by Category	PeopleSoft Payroll for North America: Canada Payroll Cost Analytics Dashboard	HC_HPY_MGMT_CHQ_CAN HC_HPY_CAT_CAN	Image 39

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Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Total Calendars Calendar Status Payment Status GL Status Totals by Error Severity Overall Audit Errors by Pay Group Presheet Audit Errors Precalculation Audit Errors Preconfirm Audit Errors Payroll Error Messages Employee Exceptions Retro Pay Volume Retro Pay Triggers Retro Pay Age	PeopleSoft Payroll for North America: Canada Payroll Operations Analytics Dashboard	HC_HPY_OPER_CAL_CAN HC_HPY_OPER_EXC_CAN HC_HPY_OPER_RET_CAN	Image 41
Earnings Categories Paycheques by Frequency Deductions Categories On Cycle and Off Cycle Calendars Employee Status by Payment Payment Method Earnings Taxes Deductions Earnings Drilldown Taxes Drilldown Deductions Drilldown	PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Dashboard	HC_HPY_CT2_CAN HC_HPY_MGMT_CHQ_CAN	Image 43
Breakdown by Pay Group Payroll Amounts by Category	PeopleSoft Payroll for North America: Canada Payroll Trends Analytics Breakdown Dashboard	HC_HPY_CT2_CAN HC_HPY_MGMT_CHQ_CAN	Image 43
Total Payroll Cost Actuals Trends Employees Paid Cost by Category Payroll Distribution by State Earnings by Category Taxes by Category Deductions by Category	PeopleSoft Payroll for North America: U.S. Payroll Cost Insights Dashboard	HC_HPY_MGMT_CHK_US HC_HPY_CAT_US	Image 39

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Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Total Calendars Calendar Status Payment Status GL Status Totals by Error Severity Overall Audit Errors by Pay Group Presheet Audit Errors Precalculation Audit Errors Preconfirm Audit Errors Payroll Error Messages Employee Exceptions Retro Pay Volume Retro Pay Triggers Retro Pay Age	PeopleSoft Payroll for North America: U.S. Payroll Operations Analytics Dashboard	HC_HPY_OPER_CAL_US HC_HPY_OPER_EXC_US HC_HPY_OPER_RET_US	Image 41
Earnings Categories Paychecks by Frequency Deductions Categories On Cycle and Off Cycle Calendars Employee Status by Payment Payment Method Earnings Taxes Deductions Earnings Drilldown Taxes Drilldown Deductions Drilldown	PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Dashboard	HC_HPY_CT2_US HC_HPY_MGMT_CHK_US HC_HPY_OPER_CAL_US	Image 43
Breakdown by Pay Group Payroll Amounts by Category	PeopleSoft Payroll for North America: U.S. Payroll Trends Analytics Breakdown Dashboard	HC_HPY_CT2_US HC_HPY_MGMT_CHK_US	Image 43

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Time and Labor

Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Needs Review • Approved, Needs Approval, Denied, and Rejected counts • Payable Time by Status • Payable Status by Department • Exceptions Time Distribution • TRC Category Drilldown • Payable Time by TRC Category • Work vs Non Work	PeopleSoft Time and Labor: Payable Time Insights Dashboard	HC_TL_GBL_PAYABLETIME	Image 42
Payable Time Trend by Department Payable Time Average Overtime Cost	PeopleSoft Time and Labor: Payable Time Trend Dashboard	HC_TL_GBL_PAYABLETIME_EXCPTN	Image 42
Actual Time Submission Actual vs Scheduled Time Reported Time by Code Reported Time Trend Top Time Reporting Codes	PeopleSoft Time and Labor: Reported Time Insight Dashboard	HC_TL_GBL_TIMESHEET HC_TL_GBL_TIMESHEET_SCHEDULE	Image 38

Global Payroll

This section lists the delivered visualizations for Global Payroll.

Global Payroll

Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Total Payroll Cost Payroll Trend Totals by Region Cost by Category Employees Paid Category Trend Total Earnings by Category Total Deductions by Category	PeopleSoft Global Payroll: Global Payroll Insights (Cost Analytics) Dashboard	GP_KIB_ED_GN_SRCH GP_KIB_ERN_DED_GN	Image 39

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Visualizations	WorkCenter/ Dashboard	Search Definition	Image Added
Calendar Type Payroll Status Calendar Status Payment Process Status Payroll Error by Severity Overall Payroll Audits by Pay Group Retro Volume Retro Age Retro Triggers	PeopleSoft Global Payroll: Global Payroll Operations Dashboard	GP_KIB_OPER_SRCH_FULL GP_KIB_OPER_SRCH_INCR	Image 40
Earning Categories Deduction Categories On-Cycle and Off-Cycle Calendars Payroll Status Payment by Frequency Payment Method Earnings Deductions Earnings Drilldown Deductions Drilldown Breakdown by Category Payroll Amounts by Category	PeopleSoft Global Payroll: Global Payroll Trends Dashboard	GP_KIB_OP_TREND_SRCH	Image 42

Recruiting Solutions

This section lists the delivered visualizations for Talent Acquisition Manager.

Talent Acquisition Manager

Visualizations	Dashboard	Search Definition	Image Added
Applications by State Applications by City Applications - External vs Internal Application - Competencies/Skills	PeopleSoft Talent Acquisition Manager: Application Details Insights Dashboard	HC_HRS_APP_INDEX	Image 34

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Visualizations	Dashboard	Search Definition	Image Added
Metrics • Open - Status Jobs • Applied - Candidates • Interview - Candidates • Offer - Candidates • Ready to Hire - Candidates In Process Applications Applications by Job Openings Total Applications by Job Postings Veteran Applications Veteran Application Phases Offers Declined Offer Declined Reasons Average Days to Hire Days to Hire by Postings Applications by Sources Application by Region (Postal Codes)	PeopleSoft Talent Acquisition Manager: Recruiter Pipeline Dashboard	HC_HRS_RECRUITER_RCMNT_ALL HC_HRS_JOB_OPENING	Image 41
Diversity Data • Ethnicity • Gender • Veteran Status • Disabled Status • Gender Distribution Recruiter Workload • Open Jobs by Recruiters • Recruiter Backlog (Applications in Applied Status) Recruiter Data • Recruitment Funnel • Recruitment Funneled by Recruiters • Average Days to Hire • Average Days To Hire By Recruiters	PeopleSoft Talent Acquisition Manager: Recruitment Admin Dashboard	HC_HRS_RCMNT_ALL HC_HRS_JOB_OPENING	Image 41

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Using Component Keyword Search Page Definitions for PeopleSoft HCM

Tables in this topic list and describe the component Keyword Search Page search definitions that Oracle delivers preconfigured for the following PeopleSoft HCM modules. If considerations exist other than those listed in the PeopleSoft HCM Search Considerations topic, they are listed in the Additional Considerations column of each table.

- PeopleSoft Administer Workforce
- PeopleSoft Global Payroll
- PeopleSoft Manage Base Benefits
- PeopleSoft Payroll for North America

Keyword Search Page search features are enabled for a component by mapping the component to a search definition. When Keyword Search Page search is enabled, the Keyword Search tab appears as a search page that the end user encounters when navigating into the component. The keyword search page enables users to perform a deeper, more free-form search to access application data from within the component.

> **Note**
>
> All of the PeopleSoft HCM Keyword Search Page searches can also be used from Global Search.

PeopleSoft Administer Workforce Component Keyword Search Page Definitions

This table lists and describes the PeopleSoft Administer Workforce component keyword search page definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Classic Navigation	Usage	Additional Considerations
Job Data (HC_HR_JOB_DATA)	Administrator: Job Data (JOB_DATA) Navigation **Workforce Administration**, and then **Job Information**, and then **Job Data**	Administrators can enter keywords to search for all jobs in a location or by job type. They can also filter or drill down on search results based on preferences using the facets and configure related actions. *Keyword Examples*: • Enter person's name or Empl ID • *Department* • *Job Code* • *Position Description* • Enter person's National ID, Pay Group • * (search for all; keyword advanced search only)	• Re-indexing does not remove a row if the current effective-date row is deleted from an employee's Job record. Stale data might be retrieved when the user performs a search. • Employee ID change, Employee ID delete, and Employee Record delete are not supported. • Any changes to location or department records that are made in Correct History mode will not be indexed. Only changes that are done by adding a new effective-dated row are indexed.

PeopleSoft Global Payroll Component Keyword Search Page Definitions

This table lists and describes the PeopleSoft Global Payroll component keyword search page definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Classic Navigation	Usage	Additional Considerations
Positive Input Search (GP_PI_SRCH)	Administrator: One Time (Positive Input) (GP_PI_MNL_ERNDED) Navigation **Global Payroll & Absence Mgmt**, and then **Payee Data**, and then **Assign Earnings and Deductions**	Administrators can enter keywords to search for positive input entries. They can also filter or drill down on search results based on preferences using the facets and configure related actions. *Keyword Examples*: • Enter person's name or Empl ID • *Element Name* • *Amount* • *Pay Group* • *Calendar ID* • *Company* • *Department* • * (search for all)	• Keyword search returns results for positive input entries that were entered within a certain number of days in the past. You define the number of days on the **Positive Input Search** field on the Installation Settings page. • The Positive Input Search component does not search for generated positive input. It searches only for entries made using the One Time (Positive Input) component.

PeopleSoft Manage Base Benefits Component Keyword Search Page Definitions

This table lists and describes the PeopleSoft Manage Base Benefits component keyword search page definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	Target Component and Classic Navigation	Usage	Additional Considerations
Health Benefit (HC_BEN_HEALTH_BENEFIT)	Administrator: Health Benefits (HEALTH_BENEFITS) Navigation **Benefits**, and then **Enroll in Benefits**, and then **Health Benefits**	Administrators (only) can enter keywords to search for employee benefits information based on plan type, coverage type, and benefit plans. *Keyword Examples:* • Enter person's name or Empl ID • Enter program number • Enter plan type *(Medical, Vision, Dental)* • * (search for all)	N/A

PeopleSoft Payroll for North America Component Keyword Search Page Definitions

This table lists and describes the PeopleSoft Payroll for North America component keyword search page definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

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Search Definition Name	Target Component and Classic Navigation	Usage	Additional Considerations
Create Additional Pay (HC_HPY_CREATE_ADDL_PAY	Administrator: Create Additional Pay (ADDITIONAL_PAY) Navigation • **Payroll for North America**, and then **Employee Pay Data USA**, and then **Create Additional Pay** • **Payroll for North America**, and then **Employee Pay Data USF**, and then **Create Additional Pay** • **Payroll for North America**, and then **Employee Pay Data CAN**, and then **Create Additional Pay**	Administrators can enter keywords to search for employees based on earning codes. *Keyword Examples:* • Employee name or Empl ID • Earning code • Department ID • Job Code • Business Unit • * (search for all)	• Only current effective-dated rows are considered. • Partial search values are not allowed for regular search. For advance search, partial field-level values with the * wild card are considered when the operator *contains* is used. For example, **Last Name** +*contains* + *Kum** • Search results, including free text search are based on the fields that are indexed.
Create General Deductions (HC_HPY_GEN_DED)	Administrator: Create General Deductions (GENL_DED_DATA) Navigation • **Payroll for North America**, and then **Employee Pay Data USA**, and then **Deductions**, and then **Create General Deductions** • **Payroll for North America**, and then **Employee Pay Data USF**, and then **Deductions, Create General Deduction** • **Payroll for North America**, and then **Employee Pay Data CAN**, and then **Deductions**, and then **Create General Deduction**	Administrators can enter keywords to search for employees based on deduction codes. *Keyword Examples:* • Deduction code • Company name • * (search for all)	(Same as for Create Additional Pay)

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Search Definition Name	Target Component and Classic Navigation	Usage	Additional Considerations
Review Garnishment Search (HC_HPY_REVW_GARN)	Administrator: Review Garnishments (GARN_REVIEW [USA]; GARN_REVIEW_CN [CAN]) Navigation • **Payroll for North America**, and then **Employee Pay Data USA Deductions**, and then **Review Garnishments** • **Payroll for North America**, and then **Employee Pay Data CAN**, and then **Deductions**, and then **Create Review Garnishment**s	Administrators can enter keywords to search for employees based on garnishment type. *Keyword Examples:* • Employee name or Empl ID • Garnishment Type • Court Name • * (search for all)	(Same as for Create Additional Pay)

Configuring Remote Search from an HCM Database

You can use Global Search to enable remote search from HCM to indexed artifacts in another database.

Steps for Configuring Remote Search from an HCM Database

The artifacts for remote search reside in the other database and must be indexed there. Integration Broker must be configured to allow communication between HCM and the remote database. With the artifacts indexed and Integration Broker configured, follow these steps to further configure the databases to enable remote search.

1. Ensure that the *Integration Administrator* role is added to the administrative user in both databases.
2. Add the default local nodes of each of the databases as network nodes in both databases (**PeopleTools**, and then **Integration Broker**, and then **Integration Network**, and then **Network Setup**).
3. Set up the Portal URI and Content URI portal nodes in both of the databases (**PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Nodes**).
4. Add the role that adds security to the remote search group to all users who should be able to search remotely for that data from HCM. Data in the remote database is accessible to a user only if the user has access to the search group in the remote database.
5. Add the default local nodes for each database to Single Signon (**PeopleTools**, and then **Security**, and then **Security Objects**, and then **Single Signon**).
6. Import the remote search group into the HCM database (**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Remote Search Groups**).

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All of the search artifacts for a remote search reside in the remote database. For the remote search to work from the HCM database, the remote search group must be imported. To import, select the default local node name for the remote database in the Content Provider drop down list on the Remote Search Groups page, and select Import. Then, on the Import Search Groups page, select the Search Category Name that you want to import

For more information, see *PeopleTools: Search Technology* “Administering PeopleSoft Search Framework”, Importing Remote Search Groups.

7. Add the imported search group to the homepage search context in the HCM database (**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Define Search Context**).

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Managing Configurable Search

Setting Up Search Configuration

Whether your organization uses fluid or classic transaction pages, the Search Configuration feature enables you to design custom search pages for a content reference based on your organization's needs. Administrators can set up searches that use either a standard record search or search definitions. Your organization has control over which fields to display and their order. Configurable search even allows the user to view recent searches when defined in the setup.

Use the Manage Search Configuration (EOSF_SRCH_CONFIG) component to configure transaction search pages to:

- Use a search record (standard) or search definition.
- Display how many recent searches a user can see on the search page.
- Identify the number of searches a user can save.

  Users can save frequently used search criteria with a name under My Saved Searches. Organizations can configure the count of saved searches a user can create.
- Specify the Search/Lookup Type a user can access (Basic, Advanced, or both) and which will be shown by default.
- Enable or disable Photo in Search Results, which determines if an image appears with a row, such as an employee picture, in the search results.
- Configure which fields will appear on the Basic and Advanced Search pages along with their field order.
- Configure which fields will appear in the Search Results grid along with their field order.
- Define the fields and elements for the Add pages, if applicable.

This topic provides an overview of setup considerations, roles needed to configure searches, and discusses setting up and viewing search configurations.

This video provides an overview of the Configurable Search feature:

Video: Image Highlights, PeopleSoft HCM Update Image 36: Configurable Search

Pages Used to Set Up Search Configuration

Page Name	Definition Name	Usage
Manage Search Configuration for Content References Page	EOSF_SRCHCFG_SRCH	Add, review, edit, or delete a search page for a content reference.

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Page Name	Definition Name	Usage
Search Configuration Page	EOSF_SRCH_CONFIG	Specify the type of search you will use and the recent, saved, basic/advanced search options, and configure search field display options.
Add Configuration Page	EOSF_ADD_CONFIG	Configure the Add page field display options.
<Transaction Search or Add> Page (The preview page name will vary based on the configuration.)	EOSF_SRCH_FL	Review how a search or add page configuration will appear to the user.
Select a Content Reference Page	EOSF_CRFURL_SELECT	Identify an application page (content reference) for which you want to add a configurable search.

Considerations for Setting Up and Using Search Configurations

Consider the following when setting up and working with configurable searches:

- When configuring search record fields that require a prompt table, such as Location or Company, you must associate a prompt table in the record definition. If it is not associated in the record definition, the prompt table cannot be configured.
- Related prompts will not work as expected in most of the cases. For example, when working with a related prompt, if the **State** field has a prompt record with the high level key of **Country**, then the results are controlled by the **Country** field value on the search page.
- When a search record is associated with dynamic prompts, then the prompt will not be shown on the search page. In such cases, users need to ensure they associate the right prompt record.
- Search events (i.e.-Search Init and Search Save) will not get triggered.
- The **Previous in List** and **Next In List** options will not be available in transaction pages to move to the next or previous row.
- When launching a search page for a classic transaction, the standard search page will briefly display before showing the configured search.
- It is not advisable to add transactions that use Configurable Search in Navigation Collections and WorkCenters because it may cause double header issues.

> **Note**
>
> You must be on PeopleTools 8.57.11 or higher to use the Configurable Search feature.

User Roles for Search Configuration

You will need to assign your users the following roles to grant access to the configurable search features.

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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, as defined in this topic.
Configurable Search User	Grants a user access to search pages using a configurable search.

Manage Search Configuration for Content References Page

Use the Manage Search Configuration for Content References page (EOSF_SRCHCFG_SRCH) to add, review, edit, or delete a search page for a content reference.

> **Note**
>
> You must be granted the *Configurable Search Admin* role to access this component.

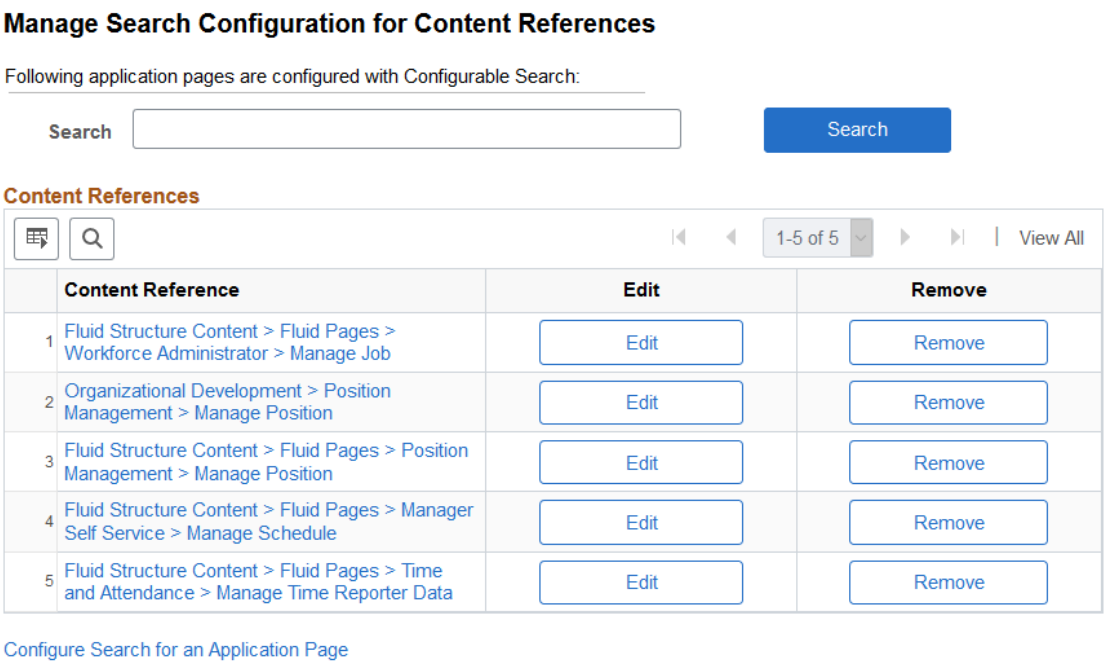
Navigation:

- **Enterprise Components**, and then **Configurable Search**, and then **Manage Search Configuration**
- Select the PeopleSoft Human Resources Administer Workforce: Manage Configurations Tile from the PeopleSoft Human Resources Administer Workforce: Manage Human Resources Dashboard, or from any other fluid home page where you have added the tile.

> **Note**
>
> You can add the Manage Configurations tile or PeopleSoft Human Resources Administer Workforce: 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** and enter the tile name or navigate to **Workforce Administrator**, and then **Manage Human Resources**, then save.

This example illustrates the Manage Search Configuration for Content References page.

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The PeopleSoft HCM application delivers the *Manage Job* application page with Configurable Search.

Field or Control	Description
Search field and button	Enter criteria to narrow the search for a content reference. The Content References grid section will display those items that match the search criteria. If no items match, the grid does not appear. Either enter new search criteria or select the Configure Search for an Application Page link to add a new search configuration for a content reference.
Content Reference link	The content reference item in this column displays as a navigational link for an application transaction page. Click the link to access the application search page (see <Transaction Search or Add> Page) to view how the search page will appear to the user.
Edit button	Click this button to access the Manage Search Configuration component (Search Configuration Page) and view or make updates to the search page content.
Remove button	Click to delete a search configuration assigned to an content reference (application page). **Note:** If you remove a configurable search, the system will used the standard delivered search for the application page (see also PeopleTools documentation *Search Technology*, "Working with PeopleSoft Search").
Configure Search for an Application Page link	Select this link to access the Select a Content Reference Page to add a new search configuration for a content reference.

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Search Configuration Page

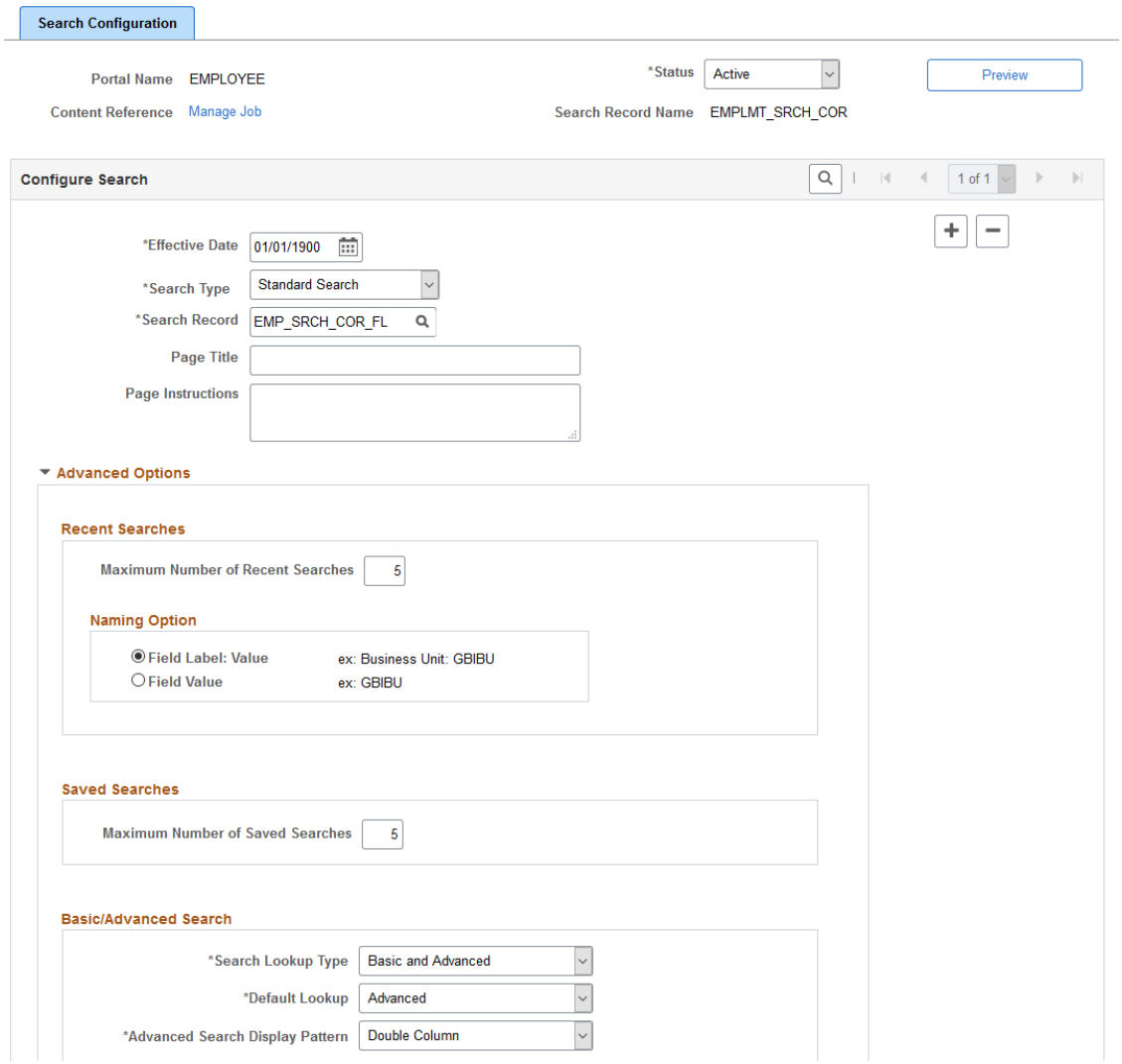
Use the Search Configuration page (EOSF_SRCH_CONFIG) to specify the type of search you will use and the recent, saved, basic/advanced search options, and configure search field display options.

Navigation:

- **Enterprise Components**, and then **Configurable Search**, and then **Manage Search Configuration**
- Select the PeopleSoft Human Resources Administer Workforce: Manage Configurations Tile from the PeopleSoft Human Resources Administer Workforce: Manage Human Resources Dashboard or from any other fluid home page where you have added the tile. Select **Configure Search**, and then **Manage Search Configuration** from the navigation collection.

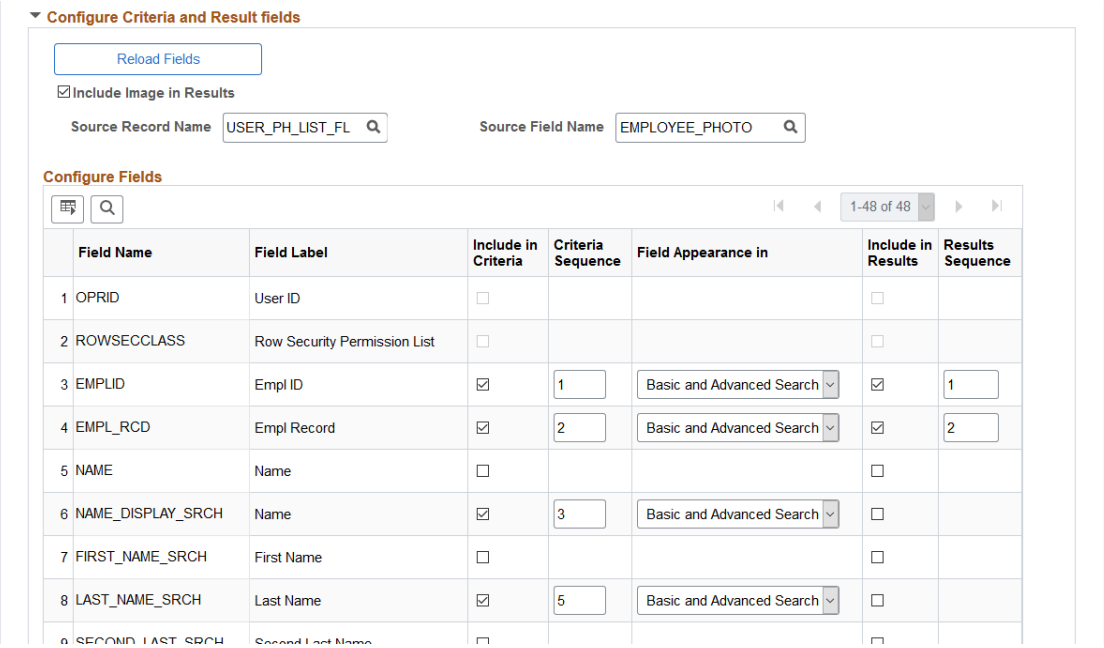
Then select the **Edit** button for the content reference.

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



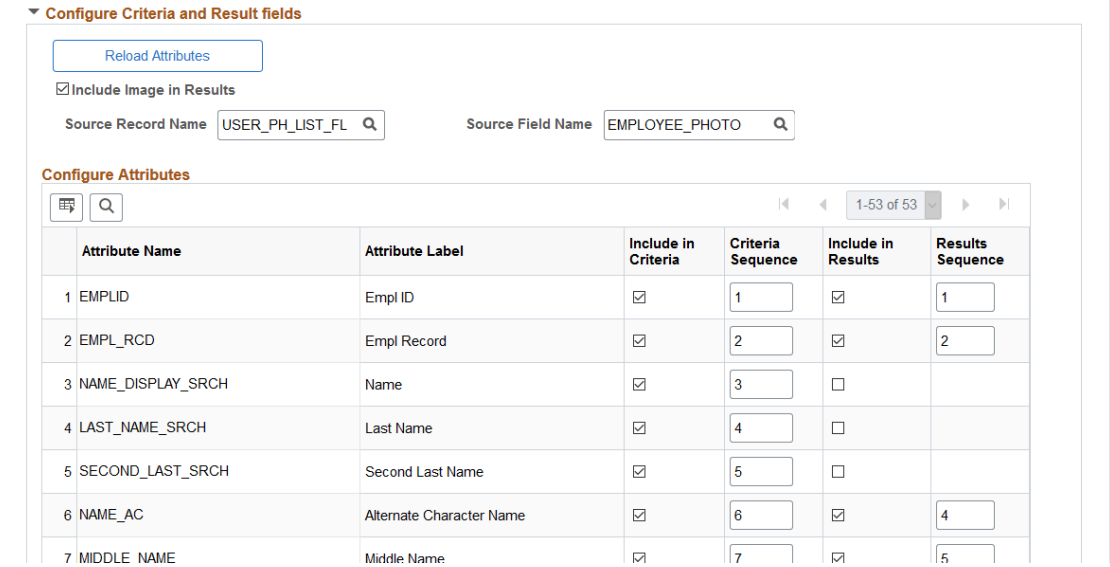
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(Standard Search search type) This example illustrates the fields and controls on the Search Configuration page (2 of 2): Configure Criteria and Results fields section when using a *Standard Search* type.



	Field Name	Field Label	Include in Criteria	Criteria Sequence	Field Appearance in	Include in Results	Results Sequence
1	OPRID	User ID	☐			☐	
2	ROWSECCLASS	Row Security Permission List	☐			☐	
3	EMPLID	Empl ID	☑	1	Basic and Advanced Search	☑	1
4	EMPL_RCD	Empl Record	☑	2	Basic and Advanced Search	☑	2
5	NAME	Name	☐			☐	
6	NAME_DISPLAY_SRCH	Name	☑	3	Basic and Advanced Search	☐	
7	FIRST_NAME_SRCH	First Name	☐			☐	
8	LAST_NAME_SRCH	Last Name	☑	5	Basic and Advanced Search	☐	
9	SECOND_LAST_SRCH	Second Last Name	☐			☐	

(Search search type) This example illustrates the fields and controls on the Search Configuration page (2 of 2): Configure Criteria and Results fields section when using the *Search* type.



	Attribute Name	Attribute Label	Include in Criteria	Criteria Sequence	Include in Results	Results Sequence
1	EMPLID	Empl ID	☑	1	☑	1
2	EMPL_RCD	Empl Record	☑	2	☑	2
3	NAME_DISPLAY_SRCH	Name	☑	3	☐	
4	LAST_NAME_SRCH	Last Name	☑	4	☐	
5	SECOND_LAST_SRCH	Second Last Name	☑	5	☐	
6	NAME_AC	Alternate Character Name	☑	6	☑	4
7	MIDDLE_NAME	Middle Name	☑	7	☑	5

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Field or Control	Description
Portal Name, **Content Reference**, and **Search Record Name**	Displays the portal, content reference name, and search record name associated with the menu or component of the content reference you selected when you created a new search configuration. Select the content reference link to access the <Transaction Search or Add> Page and view how the search page will appear to the user.
Status	Select *Active* to activate the search page. When the status is *Inactive*, the system will use the standard tools delivered search for the component.
Preview	This button appears on this page when the content reference does not allow the user to add a new transaction from the search page. When the content reference has adding capabilities, this button will appear on the Add Configuration page. Click this button to open the <Transaction Search or Add> Page in a new window to view and test how this search page will appear to the user.

Configure Search

Field or Control	Description
Search Type	Select a search type. Options include: • *Search*: Uses a search definition to perform a search. • *Standard Search*: Uses a search record to perform a search.
Search Definition	This field is available when you select *Search* as the search type. Enter the search definition that the system should use for this search page. See also Understanding PeopleSoft Search Definitions for HCM.
Search Record	This field is available when you select *Standard Search* as the search type. Enter the record table name the system should use for this search.

> **Note**
>
> If you are associating another **Search Record** or **Search Definition** value, ensure the key structure is the same as the original search record. The purpose of choosing another record is to have additional fields in the record so that the fields are available to include in search criteria or results.

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For more information on Search Framework, see the PeopleTools documentation, *Search Technology*.

Field or Control	Description
Page Title	Enter the title that should appear at the top of the search page. When you leave the field blank, the title **Search Existing** will display.
Page Instructions	Enter any text that should appear at the top of the page, such as additional information on how to complete the process.

Advanced Options: Recent Searches and Naming Option

Use this section to identify how the My Recent Searches section of the search page will appear to the user.

Field or Control	Description
Maximum Number of Recent Searches	Enter the number of recent searches that should appear in the **My Recent Searches** section at the bottom of the search page. Values can be from *0* to *999*. Enter *0* to hide the My Recent Searches section from the users. **Note:** Although the maximum number of recent searches allowed is 999, organizations should configure a reasonable number that works best for users based on the functionality of the page.
Naming Option	Select from one of the name display options for the **My Recent Searches** section of the search page: • **Field Label: Value**: Shows the field name used in the search as well as the value entered in the field. • **Field Value**: Displays only the value entered in the search field. **Note:** The **My Recent Searches** section will display only one search field value in the list. When a user enters multiple search criteria values, the recent list will display the field value of the lowest sequenced field followed by the number of search criteria used in a badge. For example, if a user entered *Joseph* for the **First Name** field and *13000* for the *Department* field in the search, and the **First Name** field has a lower sequence number, the recent list will show *First Name: Joseph +1 more*, or *Joseph +1 more* if you did not select the **Field Label: Value** option.

Advanced Options: Saved Searches

Use this section to configure how many searches a user can save for future use. Users will access their saved searches on the Advanced Search page from the **My Saved Searches** drop down menu.

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Field or Control	Description
Maximum Number of Saved Searches	Enter the number of searches a user can save for this search page. Values can be from *0* to *999*. **Note:** Entering *0* in this field will not hide the **My Saved Searches** drop down menu or the **Save Search** button from the user. Instead, when a user tries to save a search, the page will issue a message that the maximum number of saved searches has been reached. **Note:** Although the maximum number of My Saved Searches allowed is 999, organizations should configure a reasonable number that works best for users based on the functionality of the page.

Advanced Options: Basic/Advanced Search

Use this section to identify if a user should have access to the Basic Search, Advanced Search, or both search pages.

Field or Control	Description
Search Lookup Type	Select the type of search page(s) the user should be able to access. Options include: • *Advanced*: Displays only the Advanced Search page to the user. Advanced search pages allow you to enter multiple search criteria and save searches. • *Basic*: Displays only the Basic Search page to the user. Basic Search pages display the **Search By** field only and allow the user to select which search field to use. • *Basic and Advanced*: Allows the user to toggle between the Basic and Advanced Search pages to perform searches. **Note:** Access the Add Configuration Page to define which fields will appear on the Basic and Advanced Search pages.
Default Lookup	When you have selected the *Basic and Advanced* option in the **Search Lookup Type** field, enter the page that should appear first to the user: the *Basic* search page or the *Advanced* search page. When the lookup type is either *Basic* or *Advanced*, this field automatically displays this same option and cannot be changed.
Advanced Search Display Pattern	This field is available for the *Advanced* and *Basic and Advanced* search lookup type. Indicate if you want the search page to appear in a single or double column format.

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Configuration Criteria and Results fields

Field or Control	Description
Load Fields or **Reload Fields**	These buttons appear when you are working with a *Standard Search*. When you first create a configurable search for an application page, the button will display **Load Fields**. After you have performed the initial load, the button will display the text **Reload Fields**. Click this button to load the fields from the search record.
Load Attributes or **Reload Attributes**	These buttons appear when you are working with a *Search*. When you first create a configurable search for an application page, the button will display **Load Attributes**. After you have performed the initial load, the button will display the text **Reload Attributes**. Click this button to load the indexed fields from the search definition.
Include Image in Results	Select this check box to include an image with the search results. For example, you may want to include the employee's photo when doing an employee search. When you select this check box, the **Source Record Name** and **Source Field Name** fields become available for selection. Deselect to not include an image with the results rows.
Source Record Name	Select the source record (table) from which you are searching data.
Source Field Name	Enter the field name from the source record to be used for the image.

Configuration Criteria and Results fields: Configure Fields (Grid)

Use this section to identify which fields should appear for the criteria and search results.

> **Note**
>
> Although there is no limitation to the number of fields you can display in the search criteria, it is recommended that you only add up to 20 fields for a double column display pattern and 10 fields for single column pattern to prevent the need for search criteria scrolling.

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Field or Control	Description
Include in Criteria and **Criteria Sequence**	Select fields or attributes that should be part of the search criteria. When you select this check box, you can enter a sequence number for the order in which the fields should appear. The search fields will display in lowest to highest sequence order.
Field Appearance in	This column is available for the *Standard Search* type only. Indicate if the search field should appear in the Basic or Advanced Search pages. Options include: • *Advanced Search*: This search criteria will only display as a field on the Advanced Search page and will not be available for selection from the **Search By** drop down menu on the Basic Search page. • *Basic Search*: This search criteria will only be available for selection from the **Search By** field drop down menu on the Basic Search page. It will not be available on the Advanced Search page. • *Basic and Advanced Search*: This search criteria will display as a field on the Advanced Search page and be available for selection from the **Search By** drop down menu on the Basic Search page.
Include in Results and **Results Sequence**	Indicate if the field or attribute should appear as a column in the Search Results grid of the transaction search page. Use the **Results Sequence** to identify the sequence order in which it should appear. The results display the column heading sequencing in order of lowest to highest.

Add Configuration Page

Use the Add Configuration page (EOSF_ADD_CONFIG) to configure Add page field display options.

> **Note**
>
> This page is available when the content reference allows the user to add a transaction from the search page.

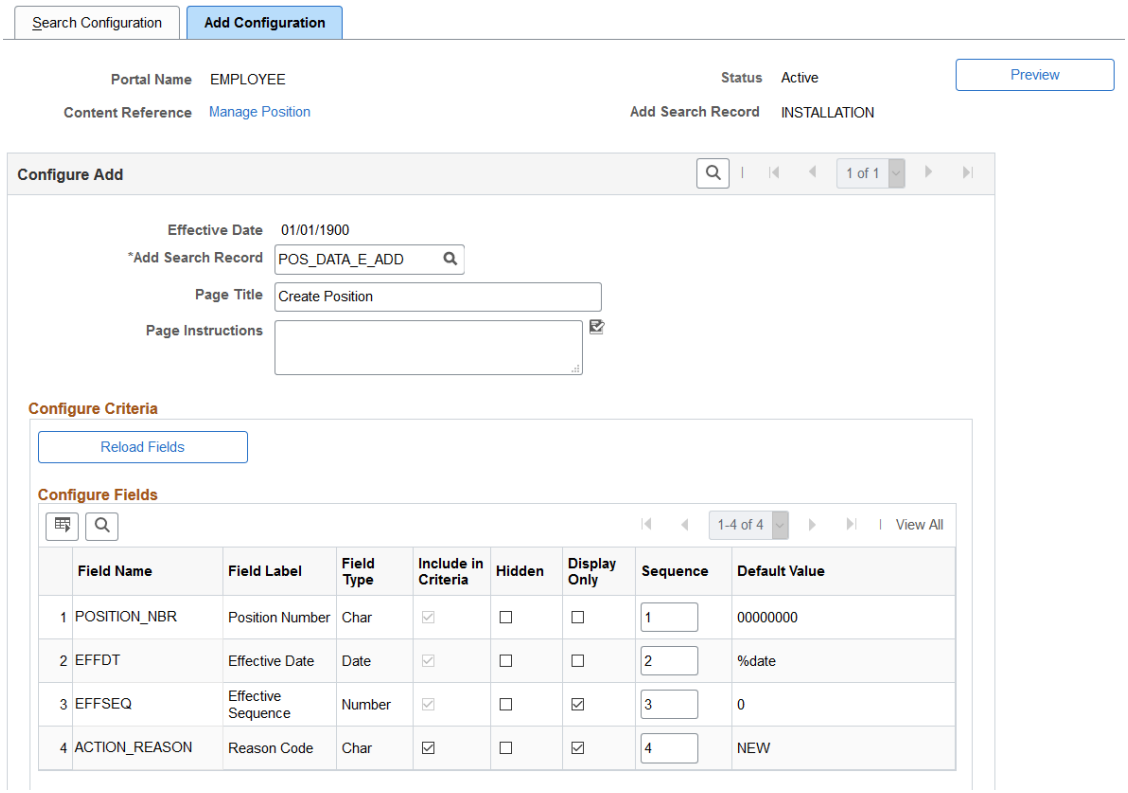
Navigation:

- **Enterprise Components**, and then **Configurable Search**, and then **Manage Search Configuration**
- Select the PeopleSoft Human Resources Administer Workforce: Manage Configurations Tile from a fluid home page where you have added the tile. Then select **Configure Search**, and then **Manage Search Configuration** from the navigation collection.

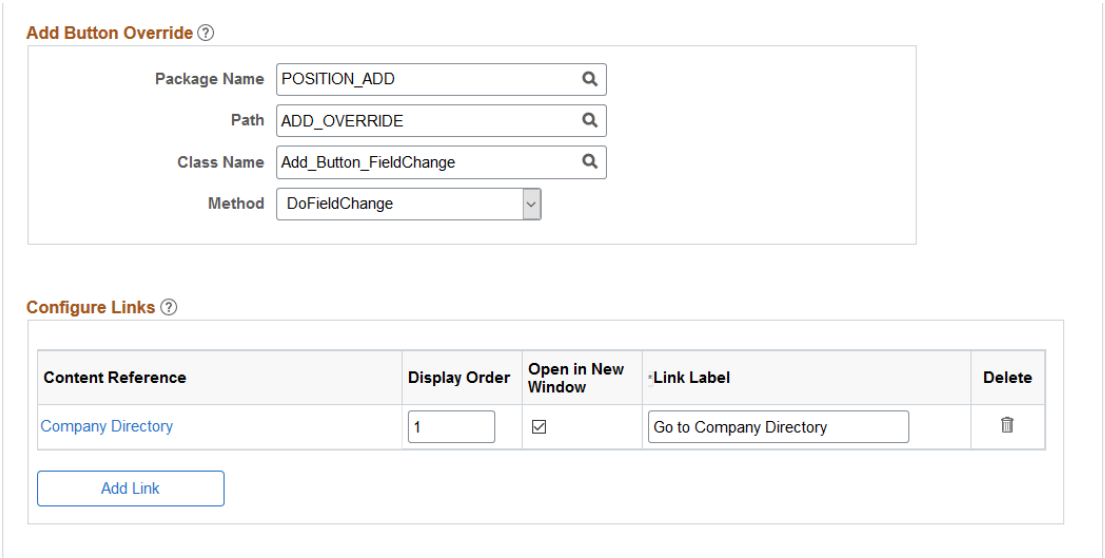
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Select the **Edit** button for the content reference that allows the ability to Add form the search page, then select Add Configuration.

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



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



Return to Manage Search Configuration Page

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Field or Control	Description
Preview	Click this button to open the <Transaction Search or Add> Page in a new window to view and test how this search page will appear to the user. Select the Add + link from that page to preview the Add page.

Configure Add

Field or Control	Description
Add Search Record	Enter the record table name the system should use for the Add transaction page.
Page Title	Enter the title that should appear at the top of the Add page. When you leave the field blank, the title **Add New** will display on the Add page.
Page Instructions	Enter any text that you want to appear at the top of the Add page, such as additional information on how to add the transaction.

Configure Criteria

Field or Control	Description
Load Fields or **Reload Fields**	When you first configure an Add page for a content reference, the button will display **Load Fields**. After you have performed the initial load, the button will display the text **Reload Fields**. Click this button to load the fields from the Add Search Record record.

Configure Fields (Grid)

Use this section to identify how the add search record fields should appear when adding a new transaction. These fields come from the value in the **Add Search Record** field of this page.

Field or Control	Description
Include in Criteria	Select fields that should be part of the add criteria. When you select this check box, you can enter a sequence number for the order in which the fields should appear. The add fields will display in lowest to highest sequence order.
Hidden	Select to not display this field as part of the add criteria.
Display Only	Select to show this field as display only during the add transaction process.
Sequence	Indicate the sequence order in which the fields should appear.
Default Value	Displays the value that is provided by default to the user.

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Add Button Override

Use this section to override the behavior of the Add button. Provide the method or application class for the target component where the user should be navigated when they select the Add button.

Field or Control	Description
Package Name	Enter the ID of the application package that contains the instance creation and action class to be invoked at instance creation.
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 to be invoked at instance creation.
Method	Enter the name of the method to be invoked to initialize the transaction.

Configure Links

Use this section to configure additional links on the page. For example, you may want to provide a link view incumbent data or matching persons. You can configure up to three links. Provide the appropriate sequence and labels for the links.

Field or Control	Description
Add Link	Select this button to open the Select a Content Reference page and select a page link.

<Transaction Search or Add> Page

Use the <Transaction Search or Add> page (EOSF_SRCH_FL) to review how a search or add page configuration will appear to the user.

> **Note**
>
> The banner displays the name of the application transaction and the page name is determined by the search or add configuration **Page Title** settings.

> **Important**
>
> You must be assigned the *Configurable Search Admin* or *Configurable Search User* role to access the transaction search pages.

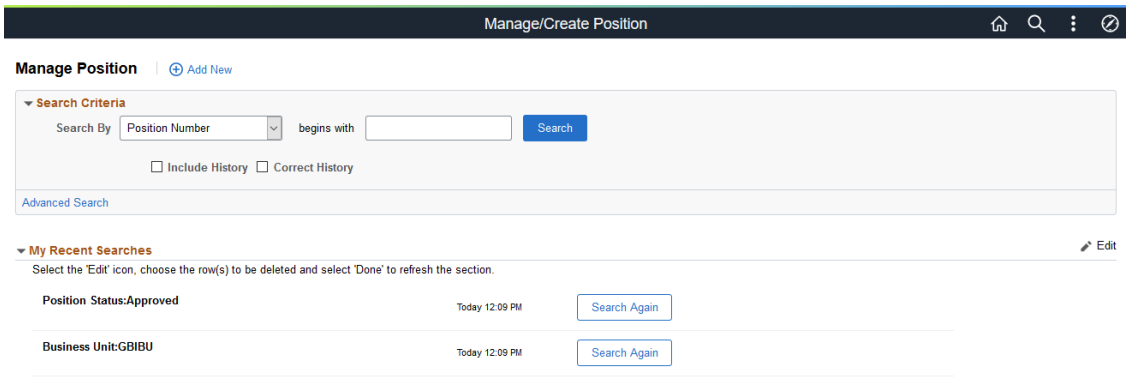
Navigation:

- Select a Content Reference link on the Manage Search Configuration for Content References Page.

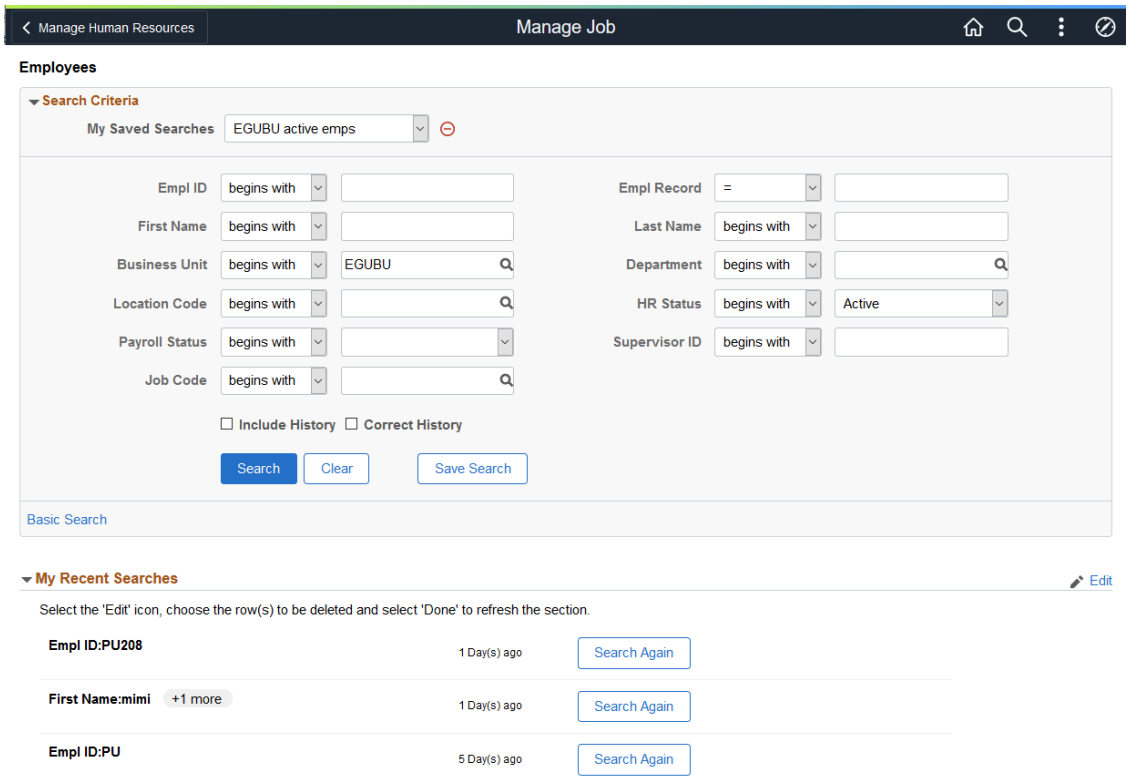
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- Click the Content Reference link at the top of the Manage Search Configuration pages (Search Configuration Page or Add Configuration Page).
- Click the **Preview Search Page** button at the top of the Search Configuration Page or Add Configuration Page.
- Open any transaction search or add page that uses a configurable search.

(Basic Search and +Add New Link) This example illustrates the <Transaction Search> page, showing an example of the Manage/Create Position basic search page where the +Add New link is available.



(Advanced Search) This example illustrates the <Transaction Search> page, showing an example of the Manage Job advanced search page.



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Configurable Search enables you to create a search or add page for a content reference based on your organization's needs. The fluid based Configurable Search can be configured for Fluid as well Classic pages.

Fields on this page will vary based on the setup configuration for the application page (see the Search Configuration Page and Add Configuration Page topics).

Field or Control	Description
+ **Add New** link	This option is only available when the content reference allows the user to add a new transaction from the search page. Click the link to view the Add page as configured.

Search Criteria

Use this section to enter search criteria values and initiate a search.

> **Note**
>
> A search page may be set up to use a Basic Search, Advanced Search, or both depending upon the configuration settings.

Field or Control	Description
My Saved Searches and (Delete Saved Search) icon	This option is only available from the Advanced Search page. Click the drop down menu to select a saved search, if any. To modify a saved search, select the search item from the menu, update the search criteria, and click the **Save Search** button. The pop up window will prompt you to replace the existing search or create a new one. To delete a saved search, select the search item from the menu and click the Delete Saved Search icon next to the My Saved Searches field. **Note:** Saved searches are specific to the logged in user.
Search By	This option is only available from the Basic Search page. Select the drop down menu to select which field you want to use in your search. Identify the viable menu items on the Add Configuration Page by selecting the **Include in Criteria** check box for a field or attribute. For Standard Search types, you need to specify *Basic Search* or *Basic and Advanced Search* in the **Field Appearance in** field for the field to appear in the drop down menu.

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Field or Control	Description
Search fields	Multiple search criteria fields are only available from the Advanced Search page. Search fields are identified on the Add Configuration Page when you select the **Include in Criteria** check box for a field or attribute. For Standard Search types, you need to specify *Advanced Search* or *Basic and Advanced Search* in the **Field Appearance in** field for the field to appear here. To define if the fields should appear in a single or double column layout, use the Basic/ Advanced Search settings on the Search Configuration Page.
Include History and **Correct History** check boxes	The search page will display the page action access types a user can perform to view or update effective dated rows. Access modes are based on a person's security access and may not be available for all users. For more information, see the PeopleTools *Applications User's Guide*, "Retrieving Data Using Keys, Search Pages, and PeopleSoft Search Technology," Using Search Pages to Retrieve Data documentation.
Save Search	This option is only available from the Advanced Search page. Click this button to save a search using the search criteria you specified. Saved searches are available from the **My Saved Searches** drop down menu at the top of the Advanced Search page and are specific to the logged in user. **Note:** The maximum number of searches that a user can save is defined on the Search Configuration Page.
Advanced Search or **Basic Search** links	Click these links to toggle between the Basic and Advanced Search pages. Access to these links and pages is based on the Basic/Advanced Search settings on the Search Configuration Page. The search page can have access to just the Basic, Advanced, or both Basic and Advanced Search pages.

My Recent Searches

Use this section to view and search for data using your recent search criteria. Like saved searches, recent searches are specific to the logged in user. This section is hidden when you have initiated a search.

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> **Note**
>
> The maximum number of recent searches that appears in this section is defined on the Search Configuration Page. The setup page also enables you to specify if you want to show just the search criteria value or the search field name label and the value you entered.

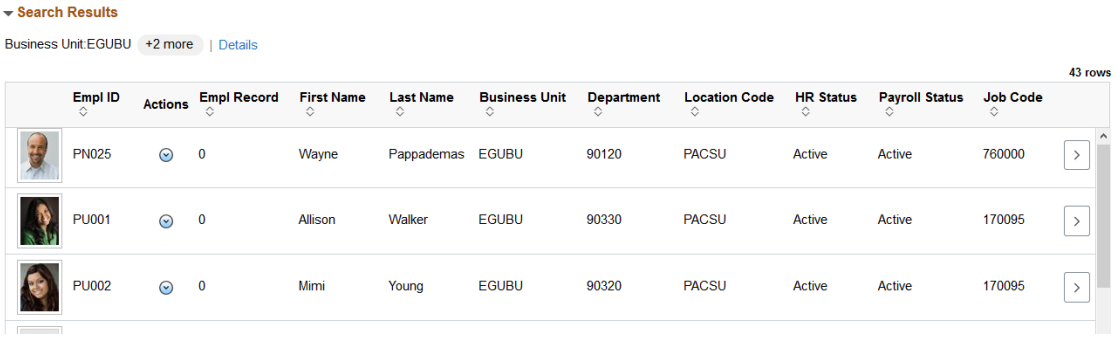
Recent searches will display the first search value (or field name and value, based on the setup) and how long ago the search was performed. When more than one search criteria value was used in the search, the field will be followed by a badge showing + and the number of criteria that was used.

Field or Control	Description
Edit (Edit) icon and link	Click this link to removed recent searches from the list. Searches that exceed the maximum allowed will automatically be removed from the list and do not need to manually be deleted.
(Delete) icon	This icon is available when you select the Edit link in the My Recent Searches section. Click the icon to remove the recent search from the list and click the Done link to return to the list.
Search Again	Click this button to initiate a previous search. This will populate the recently used search criteria in the search fields and the user has to only click on **Search** button to view the search results.

Search Results

This grid section appears below the Search Criteria section when you select the **Search** button, replacing the Recent Searches section.

This example shows the Search Results section of the search page after you have initiated a search.



Use this section to view the results from your search criteria. When results are returned, the top of this section displays the first search criteria value you entered in the search (and field label, if configured to show). When you used more than one criteria, a badge will appear with a + and the number of additional search criteria items you used followed by a Details link. Click the **Details** link to view your search criteria and make updates, if needed.

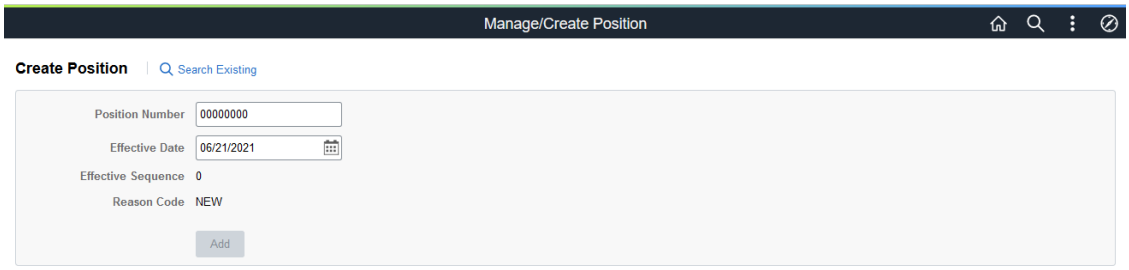
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The search result fields and order are configured on the Add Configuration Page by selecting the **Include in Results** check box for a field or attribute and entering the results sequence. The Related Action icon shows up in Search Results section automatically when the configured content reference has Component Level Related actions assigned. For more information on configuring Related Actions, see the PeopleTools documentation, *Portal Technology*, “Using the PeopleSoft Related Content Framework”. Click a column heading to sort the rows by that field.

Field or Control	Description
(Continue) button	Click this button to select a transaction row and access the record. **Note:** This button is not available for selection when you access the page using the **Preview Search Page** button on the Add Configuration Page.

Add Page

(Add Page) This example illustrates the <Transaction Add> page, showing an example of the Manage/Create Position add page.



Field or Control	Description
Search Existing	Select this link to return to the search page and perform a new search.

Select a Content Reference Page

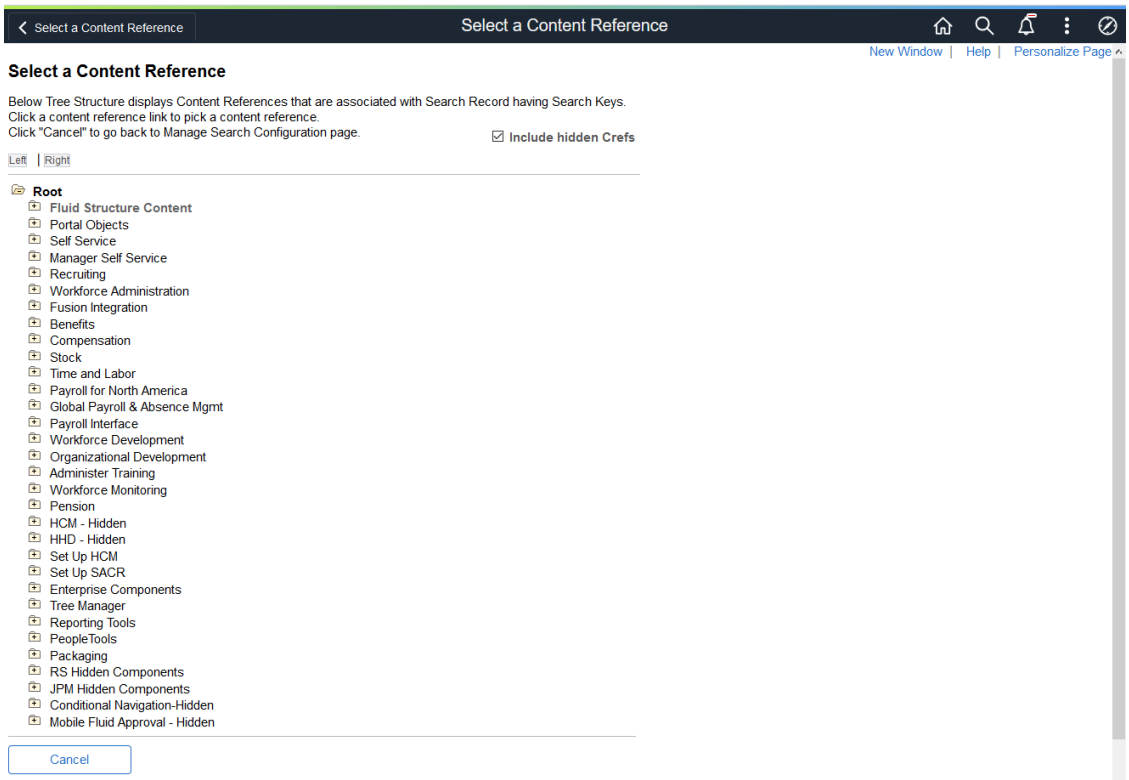
Use the Select a Content Reference page (EOSF_CRFURL_SELECT) to identify an application page (content reference) for which you want to add a configurable search.

Navigation:

Select the **Configure Search for an Application Page** link at the bottom of the Manage Search Configuration for Content References Page.

This example illustrates the Select a Content Reference page.

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Field or Control	Description
Include hidden Crefs	Select to make hidden content references available for assignment. **Note:** The tree shows both PeopleSoft component URLs and PeopleSoft component-based generic URLs.

Click a folder icon to expand or collapse a folder and display or hide child folders and links. Click a content reference link to open the Search Configuration Page and begin adding a configurable search parameters for this application page.

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Working with Common Components

Understanding PeopleSoft HCM Common Components

This section lists common elements and discusses common component pages.

Related Topics

- Understanding Approvals
  Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.
- Enterprise Components: Understanding Delegation
- Understanding the Transformation Framework
  When an application sending a service operation uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. HCM Transformation Framework uses definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

Common Elements Used When Working With Common Components

Field or Control	Description
Object Owner ID	Identifies the application in which a common component is used. This is delivered functionality.
Sub ID (sub application ID)	Used to further partition component entries by function. For example, the Sub ID of *M* (Manager) allows component entries different from those of a Sub ID of *E* (Employee).

Common Component Pages

PeopleSoft provides common pages to perform functionality across multiple Human Capital Management (HCM) applications. These pages are implemented as plug-in applications that you can easily configure and embed into an application using the provided application program interface (APIs).

These applications are typically used to capture, store and present information for a particular generic function within the context of a calling application (for example, an application such as Talent Acquisition Manager, ePerformance or Benefits Administration).

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Data Structures

Each common component manages its own data source. These common components have keys. All applications that embed the plug-in share the same data structure that uses a configurable key structure to accommodate the different requirements that each application has for organizing this data. Each application defines, or registers, the actual keys that are used when the plug-in runs within the context of the application that has embedded it. You register the keys by making an entry for the application in the plug-in's configuration page, which is keyed by the object owner ID of the embedding application.

User Interface

The use of plug-ins enables all applications that embed a plug-in to present the data consistently. For example, the same format is used to capture and present context-sensitive notes, whether the user is in Talent Acquisition Manager, ePerformance, Payroll for North America, or Benefits. To provide context-sensitive instructional text, labels, and so forth, each of the plug-in applications uses the text catalog to provide context sensitivity while maintaining a consistent style across all of HCM.

Configurable Behavior

Some embedding applications need the ability to enable, disable, or modify the plug-in functionality. Applications manipulate these configuration options inside the plug-in's configuration page—the same place it registers its keys.

HCM plug-ins, except for the text catalog, are embedded in an application by placing a graphic button on a page, and a simple API call on the button's FieldChange PeopleCode. The Text Catalog is generally invoked using an API in component-build, and/or PageActivate code.

> **⚠ Warning**
>
> Be careful when modifying configurations. PeopleSoft does not support some modifications, for example changing key values, that might cause other functionality in the application to not work as intended.

Configuring Direct Reports Functionality

To configure direct reports functionality, use the Direct Reports Interface (HR_DR_UI_CFG), Direct Reports Tables Build (RUNCTL_HR_DR), Test Direct Reports Results (HR_DRPT_API), and Invoke Direct Reports UI API (HR_DRPT_API_UITEST) components.

These topics provide an overview of direct reports, direct reports performance tables, and discuss how to configure and view direct reports functionality.

To configure and view searches that extend beyond direct report searches, see the Configuring Person Search documentation.

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Pages Used to Configure Direct Reports Functionality

Page Name	Definition Name	Usage
Direct Reports Configuration Page	HR_DR_UI_CFG_1	Configure the components and transactions that include the direct reports data functionality.
Direct Reports Transaction Configuration Page	HR_DR_UI_CFG_2	Select the actions and fields that appear on the direct reports UI for a transaction.
Direct Reports Tables Build Page	RUNCTL_HR_DR	Run the Build Direct Reports Tables process to update the direct reports for managers with current information.
Test Direct Reports Results - Set / Execute Page	HR_DRPT_API_EXEC	Test the direct reports API.
Test Direct Reports Results - Execution Results Page	HR_DRPT_API_RSLTS	View the exceptions and data returned by a method.
Test Direct Reports Results - Trace Results Page	HR_DRPT_API_TRACE	View the trace log of a method execution.
Invoke Direct Reports UI API Page	HR_DRPT_API_UITEST	Test the direct reports user interface using the classic direct reports page.
DirectReports User Interface Page	HR_DR_DIRECTREPORT	View a list of direct reports and select employees to add to the API Results list on the Invoke Direct Reports UI API page.
(Classic) <Transaction Name> - Employee Selection Criteria Page	HR_DR_DIRECTREPORT	View a list of your direct reports and select from these employees to perform transactions using the classic pages.
(Fluid) <Transaction Name> - Find Team Member Page	HR_PSEL_FLU	View a list of your direct reports and select from these team members to perform a transaction using the fluid pages.

Understanding Direct Reports Functionality

Direct reports information is used throughout HCM applications, especially in the manager self-service applications. Typically, direct reports information is used in a way that involves navigating an organizational hierarchy. For example, a manager uses Direct Reports to promote or give a raise to an employee. You may use direct report information in:

- Drill-down mode, enabling managers to select workers for processing in a self-service application.
- Chain of command mode, which determines workflow for approvals and notifications.

There are two major components for implementing direct reports functionality:

- Data service.

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The data service navigates an organization structure and returns a list of workers that report to a particular manager or a management hierarchy for a particular worker. The data service is completely unaware of its context, which enables to service both online and batch requests.

- User Interface.

  This is a common, configurable user interface (UI) that is de-coupled from data service. It receives information from the data service and presents it in a streamlined, consistent, reusable UI that enables users to visually navigate an organizational structure and select one or more workers for processing.

Direct Reports for Self Service Applications

There are two methods of setting up direct reports functionality. If you are setting up direct reports for the following applications or functionality, use the Direct Reports Setup (SS_LINK_TBL) component:

- PeopleSoft eDevelopment – Administer Training-related components
- HCM Portal Pack
- Manager Dashboard
- PeopleSoft ePay

> **Note**
>
> Otherwise, use the Direct Reports Interface component described in this topic.

Related Topics

- Setting Up Access to Direct Reports Data
  To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

Understanding the Direct Reports Performance Tables

The direct reports tables are designed to improve the performance of all direct reports processes. Although loading the direct reports tables is not required to use most manager self service pages, running this process to build the table improves the performance of the pages. However, you must run this process in order to use the Organizational Chart Viewer and Profile Management Search.

The direct reports tables store the current reporting structure for those access types that are resolved with complex processing of job data. Access types (also known as the access or navigation methods) are:

- 2 - Supervisor Id
- 3 - Department Manager ID
- 4 - Full Position Management
- 5 - Partial Position Management with Supervisor ID
- 6 - Partial Position Management with Department Manager ID

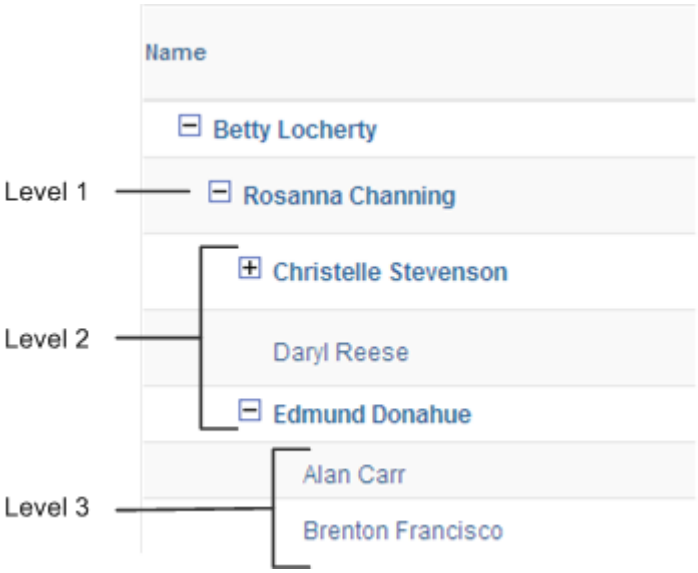
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> **Note**
>
> When you run the process for partial position methods (*Partial Position Management with Supervisor ID* or *Partial Position Management with Department Manager ID*), the process will build the subordinate method's tables as the same time. That is, the process for *Partial Position Management with Supervisor ID* will build the Full Position Management table and the Supervisor ID table before building the Position/Supervisor ID table.

There is a separate reporting structure table for each of the access methods. The tables contain a row for each supervisor and his or her direct and indirect reports. You must build the tables for each access method you use. You can run the build process for one access method at a time or for all of them at once.

For example, the following hierarchical list represents a reporting structure with Betty Locherty (KU0007) at the top of the reporting structure. This reflects how the process displays the hierarchy in a table or list form for easy query. The list indents each different level of the reporting structure. The collapse (-) and expand (+) icons appear next to other workers that are managers.

This example illustrates a hierarchical list for the manager Betty Locherty and her direct reports.



The resulting direct reports table entries would reflect a row for Betty Locherty and each worker that reports up to her: The level from Betty is defined as well as whether this person is a manager or supervisor. Then, additional rows are added for all the other managers that report to Betty and their reports. This table illustrates this scenario:

> **Note**
>
> This example is simplified with no employee record number or job information. It is used only to illustrate the concept of how the hierarchy is transformed to a table.

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SUPERVISOR_ID	EMPLID	HR_DR_LEVEL	SUPERVISOR_FLAG
KU0007 (Betty Locherty)	KU0046 (Rosanna Channing)	1	Yes
KU0007	KU0020 (Christelle Stevenson)	2	Yes
KU0007	KU0044 (Daryl Reese)	2	No
KU0007	KU0102 (Edmund Donahue)	2	Yes
KU0007	KU0150 (Alan Carr)	3	No
KU0007	KU0048 (Brenton Francisco)	3	No
KU0046 (Rosanna Channing)	KU0020 (Christelle Stevenson)	1	Yes
KU0046	KU0044 (Daryl Reese)	1	No
KU0046	KU0102 (Edmund Donahue)	1	Yes
KU0046	KU0150 (Alan Carr)	2	No
KU0046	KU0048 (Brenton Francisco)	2	No
KU0102 (Edmund Donahue)	KU0150 (Alan Carr)	1	No
KU0102	KU0048 (Brenton Francisco)	1	No

Note

You must schedule a nightly job to update the tables with any future dated information that becomes current. You can also capture Event Manager events as information is changed in the transactional pages that impact the reporting structure. Scheduling the processes will pick up these changes and apply them to the tables.

See Direct Reports Tables Build Page.

Direct Reports Configuration Page

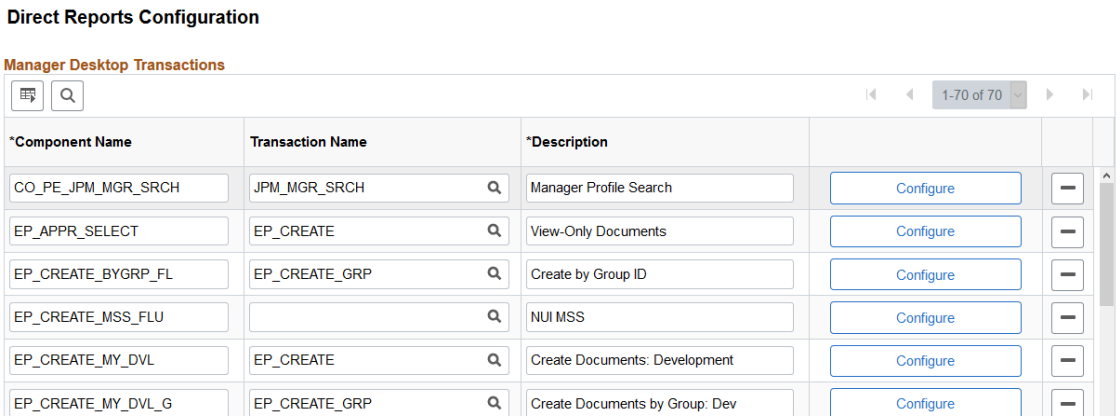
Use the Direct Reports Configuration page (HR_DR_UI_CFG_1) to configure the components and transactions that include the direct reports data functionality.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Direct Reports Interface**, and then **Direct Reports Configuration**

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

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Displays a list of components and transactions for which direct reports functionality is enabled. You can add a new component and transaction or click the **Configure** button to specify how the direct reports API and UI function within the context of the component and transaction.

Direct Reports Transaction Configuration Page

Use the Direct Reports Transaction Configuration page (HR_DR_UI_CFG_2) to select the actions and fields that appear on the direct reports UI for a transaction.

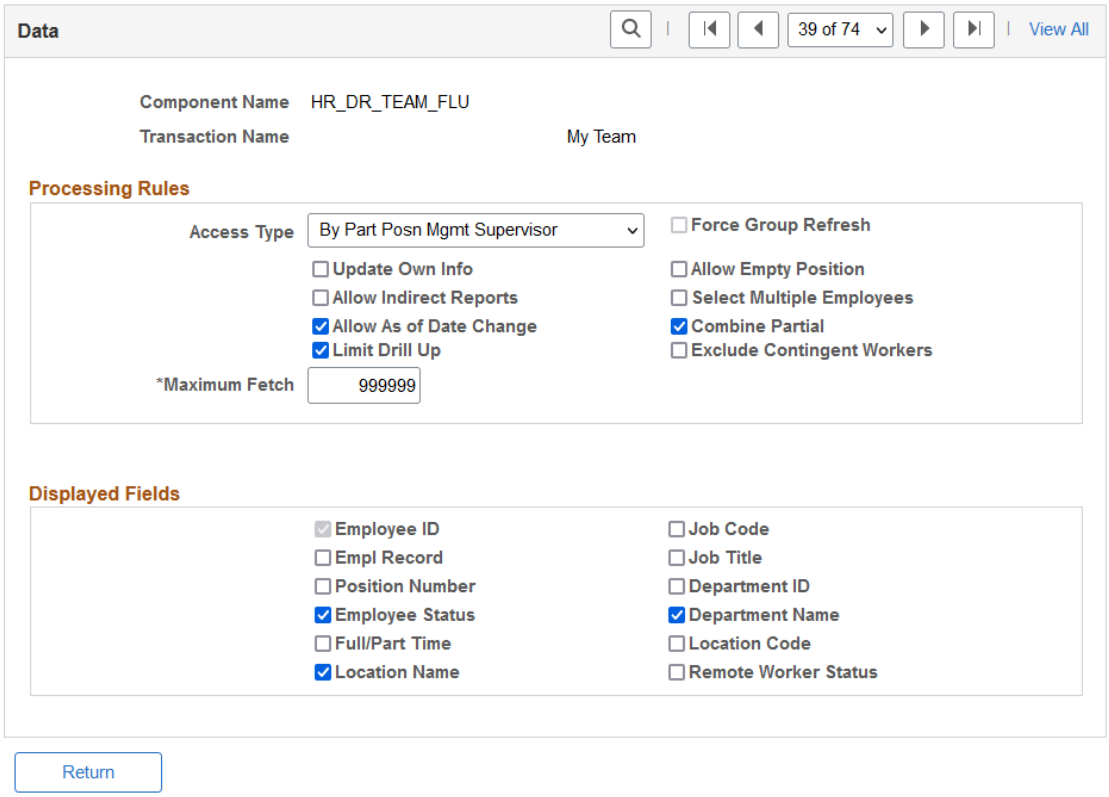
Navigation:

Click the **Configure** button for an application on the Direct Reports Configuration page.

This example illustrates the fields and controls on the Direct Reports Transaction Configuration page. You can find definitions for the fields and controls later on this page.

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Direct Reports Transaction Configuration



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Processing Rules

Field or Control	Description
Access Type	Select the reporting relationship to use for determining who reports to whom. This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options 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). For users who are department managers, the system displays a list of the workers who are in the user's department. • *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on 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 information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position. • *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

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Field or Control	Description
Update Own Info	Select to indicate that the user can update their own records. When you select this check box, the manager's information is returned in the direct reports results list along with their direct reports or management hierarchy.
Allow Indirect Reports	Select to return indirect reports of the user. This navigates down the organizational hierarchy and returns direct reports of direct reports and so forth until the lowest reporting level is reached.
Allow As of Date Change	Select to enable the ability to change the as of date.
Limit Drill Up	Select to limit the drill up.
Maximum Fetch	Enter the maximum amount of rows the system should retrieve.
Force Group Refresh	Select to run the Group Build process (GBP002) to refresh the group membership prior to displaying direct reports. If you do not select this check box, the group members as of the last scheduled run of the process appear on the page. The system only makes this check box available if you select the access type *By Group ID*.
Allow Empty Position	Select to return unfilled position reports. This check box is available when you select one of the position-related options as an access type.
Select Multiple Employees	Select to enable the user to select more than one worker from the search results. If this field is selected, a check box appears next to the names in the results list, otherwise a **Select** button appears. **Note:** You should not modify this value on delivered transactions, as they are built for selection of single or multiple values and if you change the setting, the transaction as delivered might not work.
Combine Partial	Select to indicate, when using one of the partial position management navigation methods, that the secondary method be applied even if the primary method returns valid data.
Exclude Contingent Workers	Select to not include contingent workers in the direct line reporting hierarchy.

Displayed Fields

Select one or more fields to appear within the direct reports list when rendered by the application.

> **Note**
>
> Options may vary based on the component.

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Related Topics

- Configuring Self-Service Transactions
  Self-service transactions serve as extensions of a core PeopleSoft application. They enable workers to update their personal information or to perform some basic task required by their job.
- Reviewing Transactions
  This section discusses how to review transaction activity.
- (USF) Reviewing Federal Self-Service Transactions
  This topic provides an overview of federal self-service transactions and discusses how to review federal self service transactions.
- Setting Up Access to Direct Reports Data
  To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

Direct Reports Tables Build Page

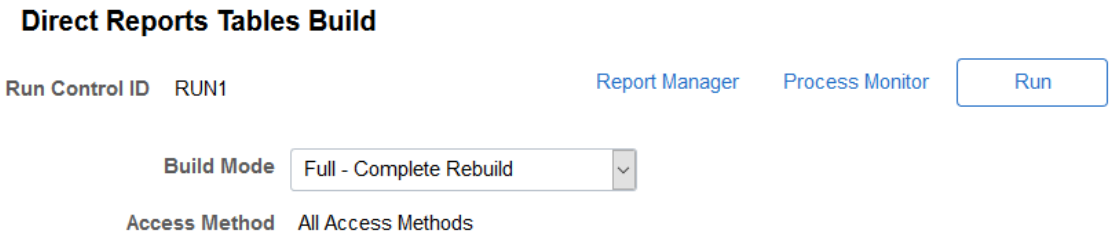
Use the Direct Reports Tables Build page (RUNCTL_HR_DR) to run the Build Direct Reports Tables process to update the direct reports for managers with current information.

This process also supports pivot grids throughout the system by populating direct report flat tables corresponding to each access type. The pivot chart selects data from flat tables through PSQuery.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Direct Reports Table Build**, and then **Direct Reports Tables Build**

This example illustrates the fields and controls on the Direct Reports Tables Build page. You can find definitions for the fields and controls later on this page.



This process maintains the direct reports tables. When run in *Full-Complete Rebuild* mode, it truncates the tables and builds them based on the current structure defined in the JOB, POSITION_DATA, and DEPT_TBL tables. When run in *Incremental-Current Date Upd* mode, it detects changes made to the three tables since the last run date and updates the tables accordingly.

> **Note**
>
> Set up this process to run in *Incremental-Current Date Upd* mode every night shortly after midnight using a recurring schedule to capture the formerly future-dated rows that are now current and effective.

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Field or Control	Description
Build Mode	Identify the mode in which to build the tables. • *Full - Complete Rebuild:* Truncates and reloads all reporting data. • *Incremental - Current Date Upd:* Gathers changes made to reporting data or information that has become current since the last run of this process and applies the changes to the direct reports tables.
Access Method	Select which direct access method tables to process. If you use more than one access method but not all of the access methods, you should build the tables for those you use. You can run the process for one access method at a time or for all at once. Method options are: • *2 - Supervisor Id* • *3 - Department Manager ID* • *4 - Reports To Position* (full Position Management) • *5 - Position / Supervisor ID* (partial Position Management with supervisor ID) • *6 - Position / Dept Manager* (partial Position Management with department manager ID) • *All Access Methods*

> **Note**
>
> If you run the process for the partial position methods (*5 - Position / Supervisor ID* or *6 - Position / Dept Manager*), the process will build the subordinate method's tables at the same time. That is, the process for *5 - Position / Supervisor ID* will build the *4 - Reports To Position* table and the *2 - Supervisor Id* tables before building *5 - Position / Supervisor ID.*

Updating Direct Reports Tables

You can update the direct reports tables two ways:

1. The Direct Reports Table Build process

   Schedule to run this process nightly (after midnight) using a recurring schedule for each access method for which you have run for the initial build. This job should run using the build method *Incremental-Current Date Upd.* This process will update the tables with information that has become current since the process was last run and any changes made since the last process run. This is required to keep the table up to date with any changes to reporting data.

2. The Event Manager direct reports events

   This process will maintain the current data as the data is updated online.

   These events are not required, as the nightly process will pick up any changes made during the day. They are provided to get real time updates to current data. They do not detect future dated rows that have become current so they do not replace the nightly process. The events provided are:

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- *AssignmentAdded* – New Empl Rcd created
- *AssignmentTerminated* – Assignment (Job) terminated
- *DRDepartmentManagerUpdated* – Department manager changed
- *DRDepartmentUpdated* – Department ID changed
- *DRPositionDataUpdated* – Position data reporting changed
- *DRPositionReportingUpdated* – Position or Reports To updated
- *DRSupervisorUpdated* – Supervisor changed
- *DRStatusUpdated* – Effdt and Status updated

> **Note**
>
> The Direct Reports events use the EOEN_MSG_CHNL queue and the EOEN_MSG service operation. If these are not configured, the Direct Reports table will not be updated.

For information on Event Manager set up and activation, see Events and Notifications Framework: PeopleSoft Events and Notifications Framework Overview

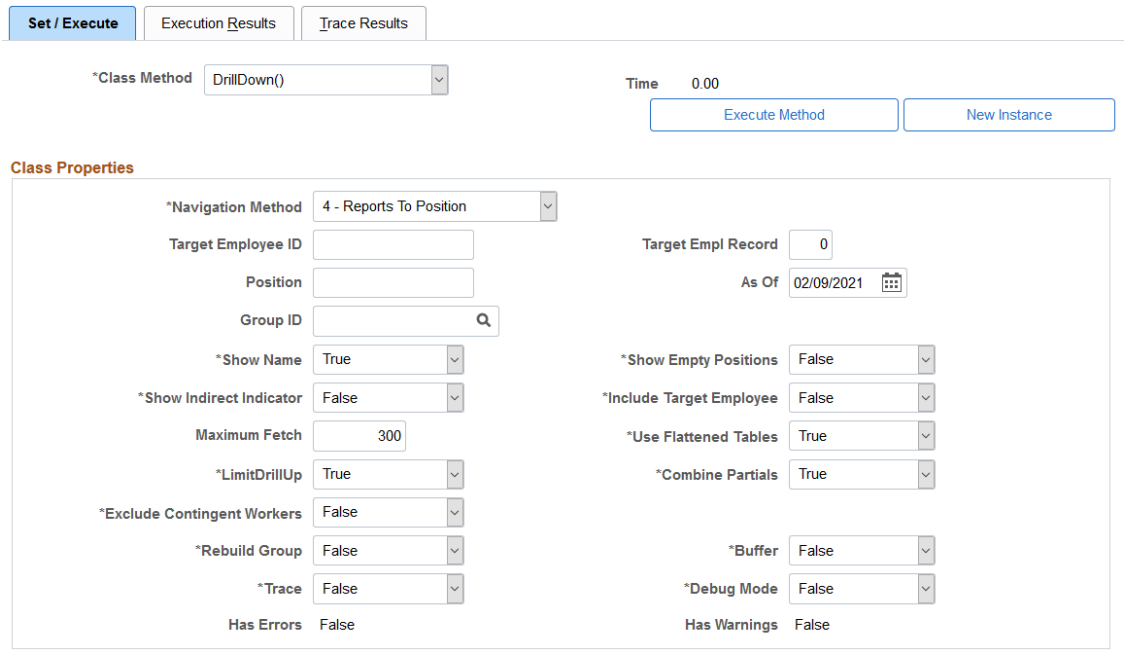
Test Direct Reports Results - Set / Execute Page

Use the Test Direct Reports Results - Set / Execute page (HR_DRPT_API_EXEC) to test the direct reports API.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Test Direct Reports Results**, and then **Set / Execute**

This example illustrates the fields and controls on the Test Direct Reports Results - Set / Execute page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Class Method	Select a method from the available options: • *DrillDown()* Logically navigates down one level in the reporting structure to expose all of the direct reports for the worker . This is the most common use of the application class — this method returns the direct reports for a worker/job. • *DrillUp()* Logically navigates up one level in the reporting structure to expose the worker's supervisor and all the supervisor's direct reports. • *GetPeers()* Invokes the GetSupervisor() method for the target worker, and then invokes DrillUp() to expose all of the direct reports for this supervisor (which is the same as returning all the peers for a particular person). • *GetSupervisor()* Gets the supervisor for the target worker. This method is useful if the application needs to determine the target worker's supervisor, but not the supervisor's direct reports. For example, to send a notification to an worker's supervisor, the application must determine the identity of the supervisor.
Execute Method	Click to execute the method using the class properties you set.

Class Properties

The properties and their default values, if any, of the selected class appear in this page region. You can change any of these before executing the method.

Field or Control	Description
Navigation Method	Select the method to use when determining reporting relationships. The options are: *1 - Department Security Tree, 2 - Supervisor ID, 3 - Department Manager ID, 4 - Reports To Position, 5 - Position / Supervisor ID, 6 - Position / Dept Manager,* and *7 - Group ID.*
Target Employee ID	Enter the employee ID of the target employee.
Target Empl Record	Enter the employee record number of the target employee.
Position	Enter the position of the target employee.
As Of	Enter the as of date to use when determining reporting relationships.
Group ID	Enter a group ID when **Navigation Method** is *Group ID.*

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Field or Control	Description
Show Name	Indicate if the system should include employee names in the **Direct Reports Rowset** grid. The default value is *True.*
Show Empty Positions	Identify whether unfilled positions should be returned in the **Direct Reports Rowset** grid when the navigation method is position-based. The default value is *False.*
Show Indirect Indicator	Identify whether the **Direct Reports Rowset** grid should indicate whether an employee has direct reports. The default value is *False.* **Note:** Not applicable when **Navigation Method** = *Department Security* or *Group ID.*
Include Target Employee	Should the target employee be filtered out of the returned **Direct Reports Rowset** and **Supervisor Rowsets** grids. When *True,* the target employee is not filtered out. When *False* (which is the default), circular reporting relationships are not shown.
Maximum Fetch	Enter the maximum number of rows to return.
Use Flattened Tables	Select *True* or *False*. For better performance, the PeopleSoft application provides the framework for creating flattened views of reporting structures so that they can be accessed easily.
LimitDrillUp	Indicate if the user be allowed to DrillUp to a level higher than the target employee/job that was first specified. For example, when used in a manager self-service transaction, should I be able to drill down 2 levels, and then up 3 levels to expose and select my peers? On the other hand, when used in a notification process, drilling up beyond the initial target employee/job is essential. When *True* (which is the default), DrillUp is limited.
Combine Partials	Indicate, when using one of the partial position management navigation methods, whether the secondary method be applied even if the primary method returns valid data. The default value is *True.*
Rebuild Group	Specify, when the **Navigation Method** is *Group ID,* if the system should force the group to be rebuilt, even if group results for this effective date already exist.
Buffer	Indicate if the service should buffer the next level up and down to increase performance. The default value is *False.*
Trace	Indicate if the service should generate a trace of processing when executing class method. The default value is *False.*
Debug Mode	Specify, when **Debug Mode** = *True,* if any exceptions encountered during execution should be displayed prior to the results set being displayed.

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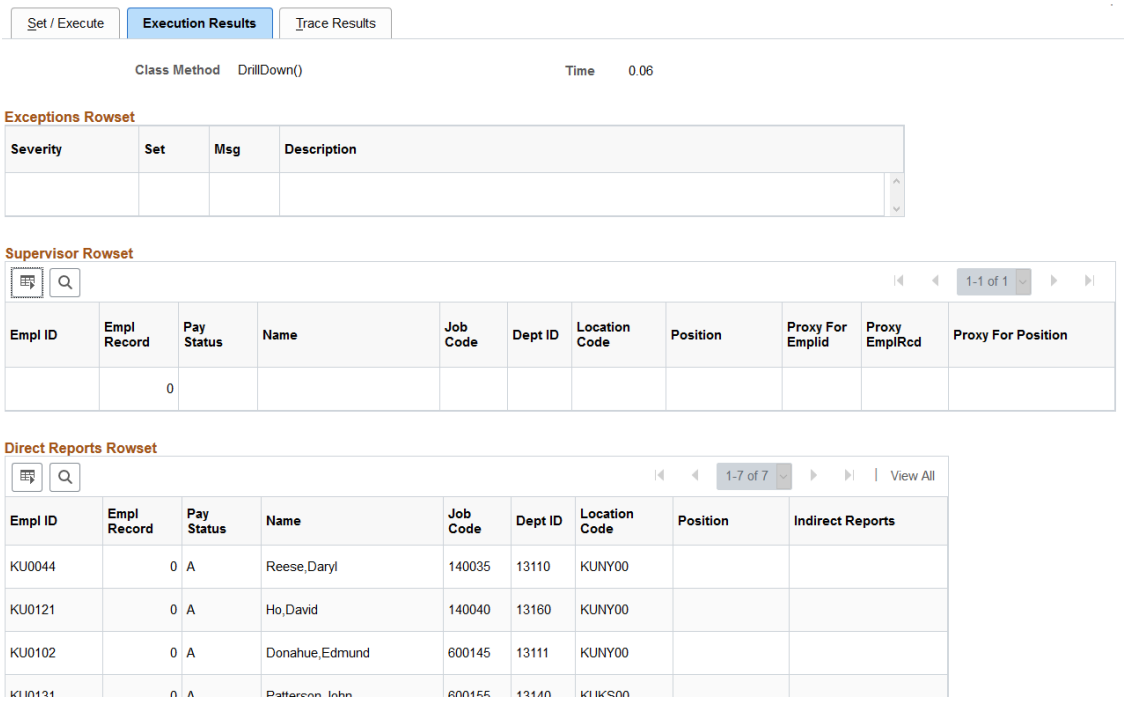
Test Direct Reports Results - Execution Results Page

Use the Test Direct Reports Results - Execution Results page (HR_DRPT_API_RSLTS) to view the exceptions and data returned by a method.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Test Direct Reports Results**, and then **Execution Results**

This example illustrates the fields and controls on the Test Direct Reports Results - Execution Results page. You can find definitions for the fields and controls later on this page.



This page enables you to view results of the method execution.

Test Direct Reports Results - Trace Results Page

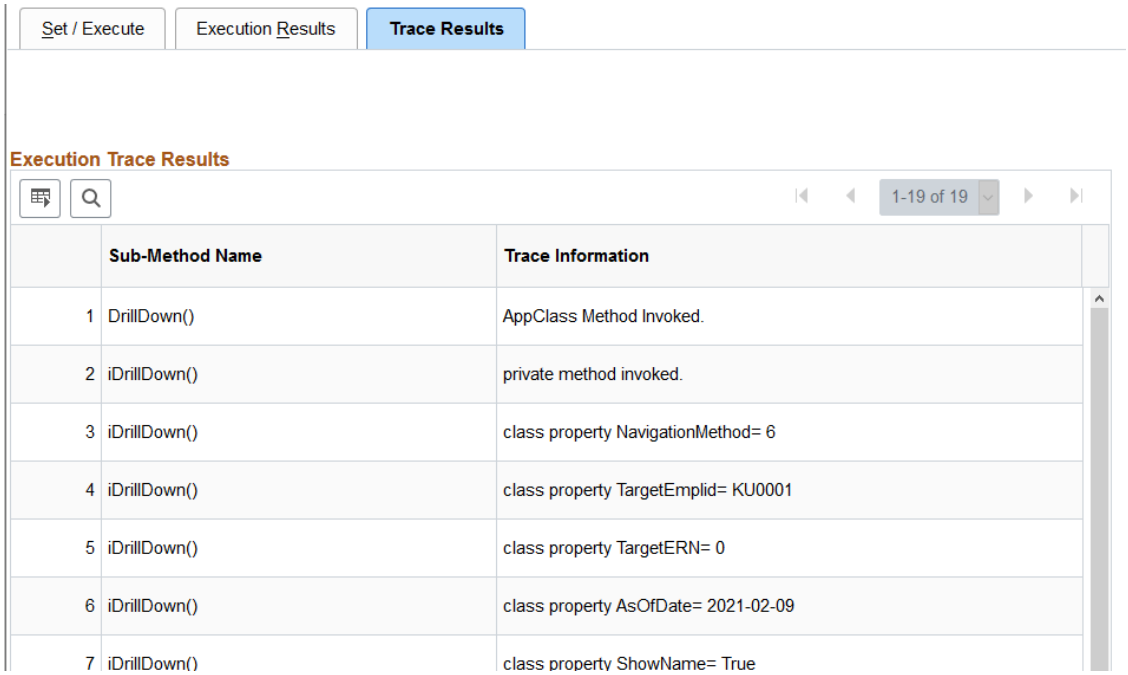
Use the Test Direct Reports Results - Trace Results page (HR_DRPT_API_TRACE) to view the trace log of a method execution.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Test Direct Reports Results**, and then **Trace Results**

This example illustrates the fields and controls on the Test Direct Reports Results - Trace Results page. You can find definitions for the fields and controls later on this page.

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Data appears on this page only if you select *True* for the **Trace** class property.

Invoke Direct Reports UI API Page

Use the Invoke Direct Reports UI API page (HR_DRPT_API_UITEST) to test the direct reports user interface using the classic direct reports page.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Direct Reports for Managers**, and then **Test Direct Reports Display**, and then **Invoke Direct Reports UI API**

This example illustrates the fields and controls on the Invoke Direct Reports UI API page. You can find definitions for the fields and controls later on this page.



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The testing of this API shows the results set that the you will see based on the current configuration. To populate the API Results grid, select a component name and click **Execute API.** The system will present the <Transaction Name> - Employee Selection Criteria page where you will enter an as of date and select employees as of that date.

The example here shows the **API Results** values that were made by selecting *Cynthia Adams* from within the application context Location Change component pages.

DirectReports User Interface Page

Use the DirectReports User Interface page (HR_DR_DIRECTREPORT) to view a list of direct reports and select employees to add to the API Results list on the Invoke Direct Reports UI API page.

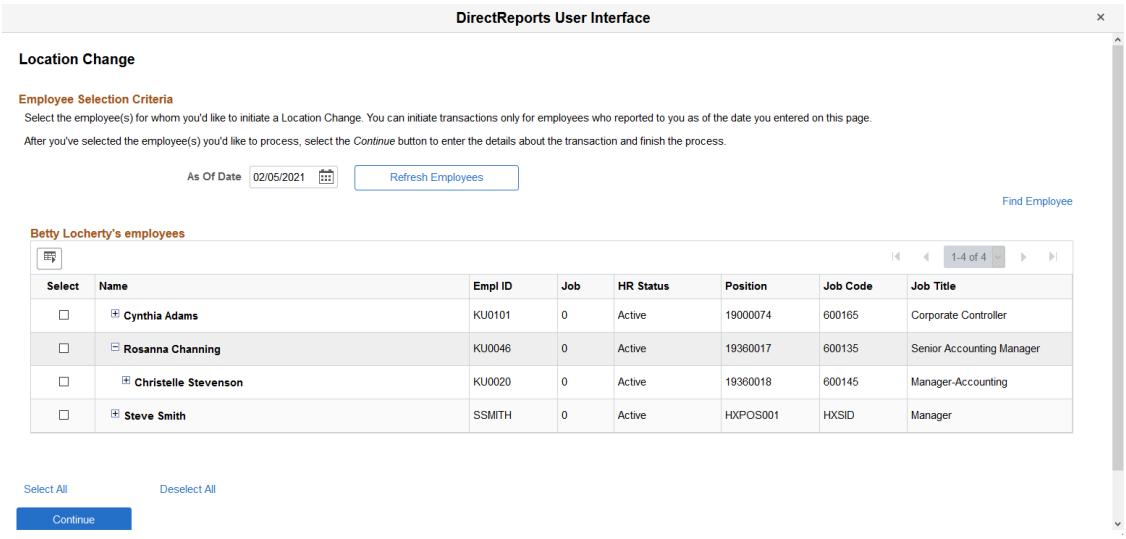
Navigation:

Select a value from the **Component Name** field and click **Execute API** button on the Invoke Direct Reports UI API page.

This example illustrates the fields and controls on the DirectReports User Interface: <Transaction Name> - Employee Selection Criteria page through the DirectReports User Interface page access.

> **Note**
>
> Where <Transaction Name> represents the name of the application page and transaction you are accessing.

This example also displays Select as a check box option, where you can select multiple team members for this transaction.



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> **Note**
>
> This page displays the classic interface for any component defined with a Direct Reports Configuration. Although you can select fluid components from the Invoke Direct Reports UI API Page, you can only view it using the classic user interface from this page.

When you select the direct reports, the direct reports plug-in executes within the context of the component and returns the results to the **API Results** grid on the Invoke Direct Reports UI API page.

> **Note**
>
> Managers will access the (Classic) <Transaction Name> - Employee Selection Criteria Page to select direct reports when using the classic pages. See this page for field definitions.

(Classic) <Transaction Name> - Employee Selection Criteria Page

Use the <Transaction Name> - Employee Selection Criteria page (HR_DR_DIRECTREPORT) as a manager to view a list of your direct reports and select from these employees to perform transactions using the classic pages.

The page displays team members based on the direct reports configuration for the classic Transaction Name.

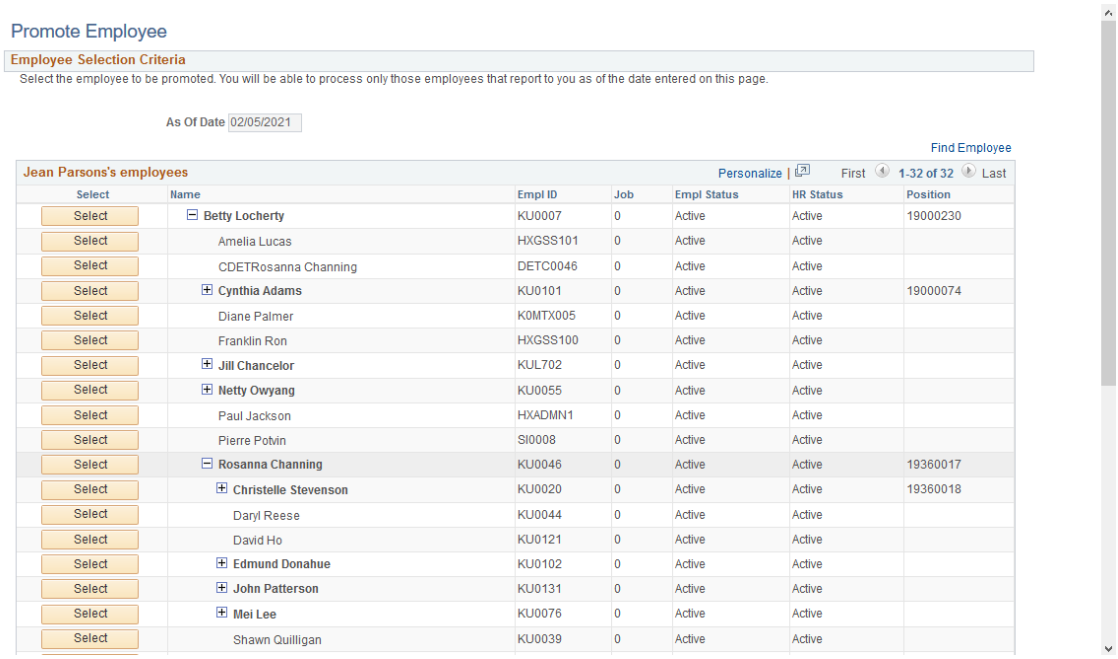
> **Note**
>
> Where <Transaction Name> represents the name of the application page and transaction the manager is accessing.

Navigation:

As a manager, access an application transaction component where you need to select one of your employees.

This example illustrates the <Transaction Name> - Employee Selection Criteria page when a manager accesses a system transactional page that requires him or her to select one of their team members using the classic pages. This example also displays Select as a button, where you can only select one employee for this transaction.

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Use this page to select the direct reports. Click the + (expand) button next to an employee's name to drill down and view their reports. Click the - (collapse) to hide the direct reports of a person.

Employee Selection Criteria

Field descriptions for the example, and for any <Transaction Name> – Employee Selection Criteria page (HR_DR_DIRECTREPORT), are as follows.

Field or Control	Description
Find Employee link	This link appears on the right, above the grid header. To search within your direct reports organization, click the **Find Employee** link, which enables you to select from the same list of direct and indirect reports as if you expanded all nodes. **Note:** The Direct Reports UI setup determines which employees are available for selection and which fields appear on the <Transaction Name> - Employee Selection Criteria page. When you select this link, the system displays the Find Employee page (HRDR_SRCH_EMPS_SEC), where you can enter search criteria. You can select an employee from this page to open in the transaction. **Note:** The Find Employee page allows you to select only one employee from the search results. It does not allow you to select groups of individuals.

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Field or Control	Description
Select button	The **Select** button appears when the transaction applies to one individual. Managers click this button to be taken to the transaction page for this person.
Select check box, and **Continue** button	The **Select** check box appears for transactions where you can select groups of individuals for whom you will perform the transaction. After selecting employees, the manager clicks the **Continue** button to perform the transaction for all the selected employees. For example, a manager can transfer multiple employees to a new location at the same time.
HR Status	The **HR Status** field appears on the Employee Selection Criteria page only if the **Allow Indirect Reports** check box is selected on the Direct Report Transaction Configuration page Inactive employees can have active employees reporting to them directly or indirectly.

(Fluid) <Transaction Name> - Find Team Member Page

Use the <Transaction Name> - Find Team Member page (HR_PSEL_FLU) as a manager to view a list of your direct reports and select from these team members to perform a transaction using the fluid pages.

The page displays team members based on the direct reports configuration for the fluid Transaction Name.

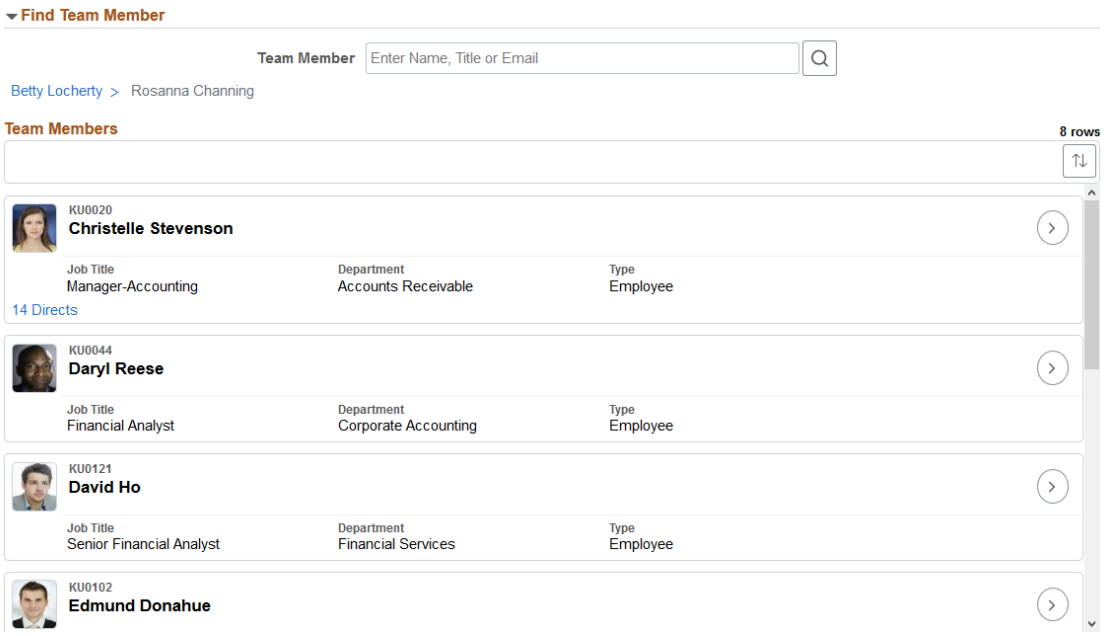
> **Note**
>
> Where <Transaction Name> represents the name of the application page and transaction the manager is accessing.

Navigation:

As a manager, select a transaction component that requires you to select from a list of your team members.

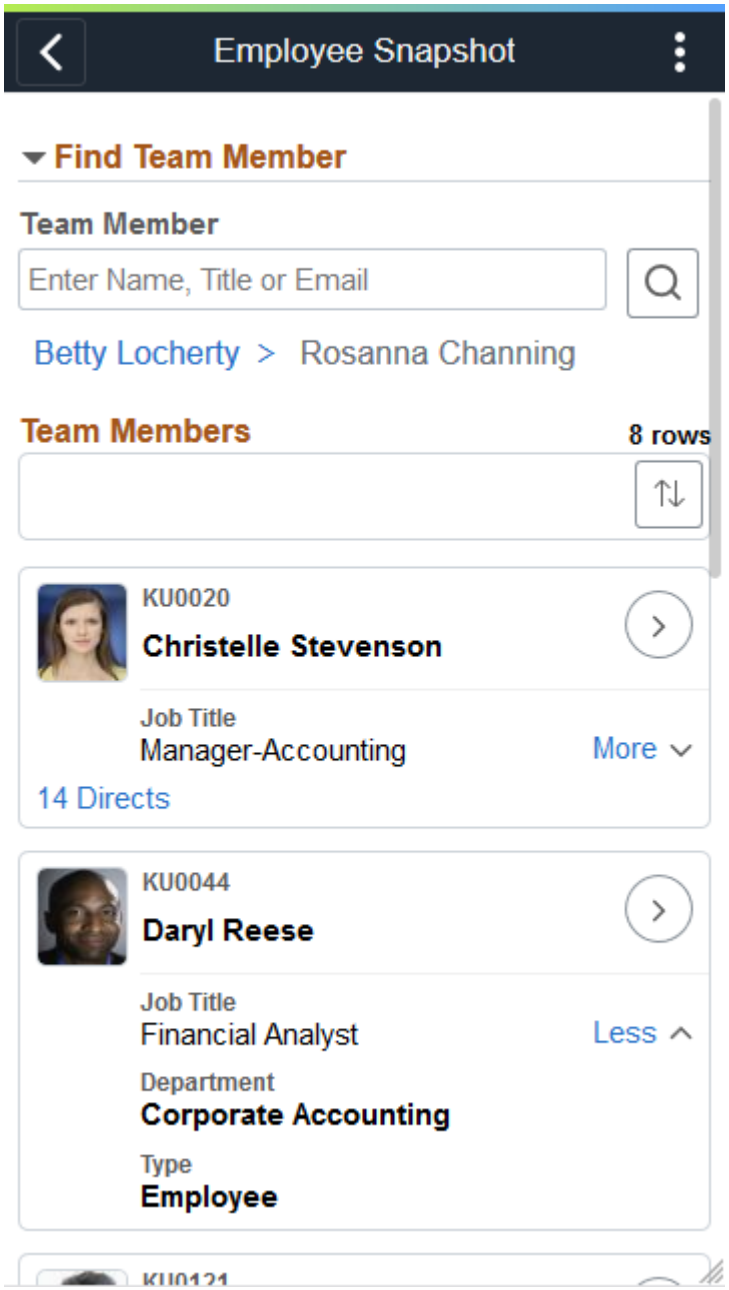
This example illustrates the <Transaction Name> - Find Team Member page when using fluid.

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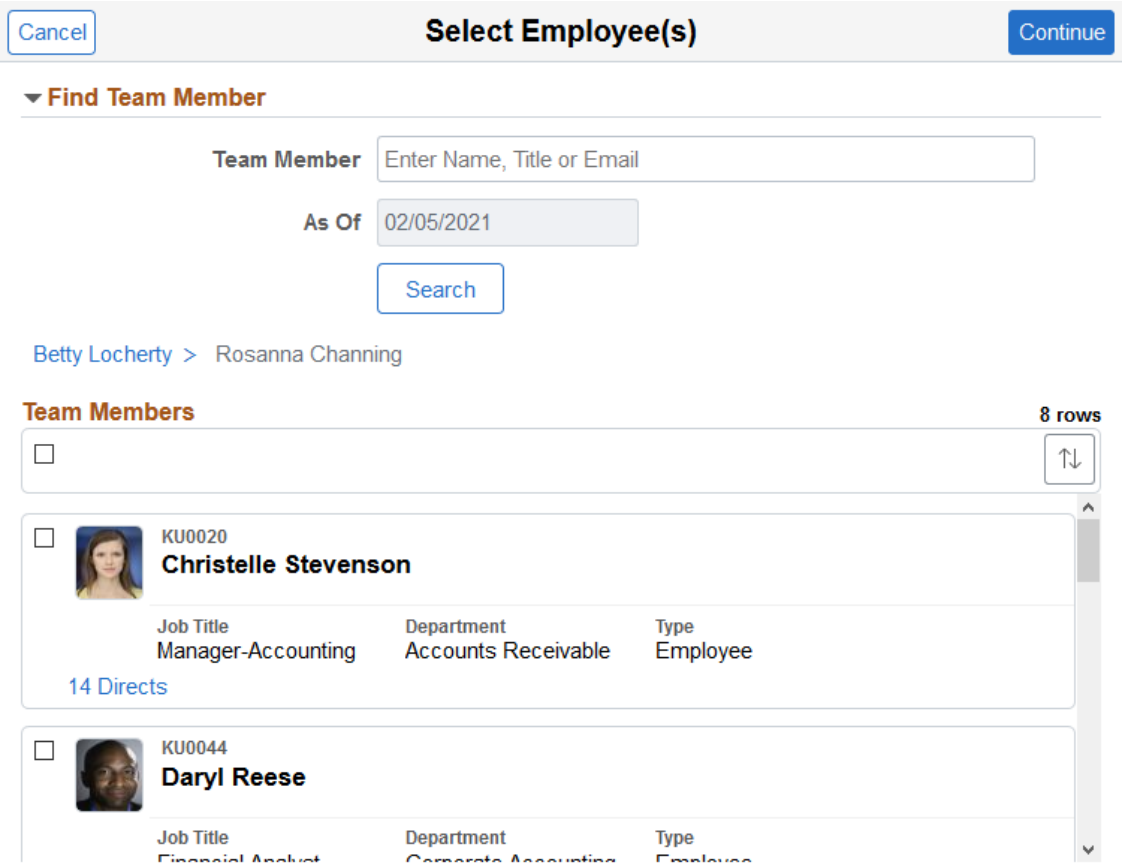
This example illustrates the <Transaction Name> - Find Team Member page using a small form factor device like a smartphone.

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In some transaction components, the Find Team Member page is displayed as a secondary modal. The name in the banner may vary and is based on the configuration. This example illustrates the Select Employee(s) – Find Team Member secondary modal page of a transaction when using fluid. This example also displays Select as a check box option, where you can select multiple team members for this transaction.

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This page displays all direct, and indirect reports in some cases, of the logged-in manager based on the manager's job. Depending on the transaction page, managers can either select one or multiple employees to view or perform a transaction.

Use this page to search for and select an employee for whom you want to manage a transaction.

Find Team Member

Expand this section to use search criteria to narrow your search for team members.

Field or Control	Description
Team Member	Enter a partial or full name, title, or email description to filter and narrow your search on team members. To search within your direct reports organization, click the **Find Employee** link. Enter criteria on the Find Employee page (HRDR_SRCH_EMPS_SEC), and then click **Search.** Select an employee to open in the transaction.

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Field or Control	Description
As Of	This field is not available for all transactions and is based on the configuration of the transaction. **Note:** When configuring the As Of field, the transaction that is using direct reports should also be designed to change the date. Enter a date to specify the period in time you want to view your direct reports' information.
Search button	Click this button to have the system display a list of direct (and indirect reports, if applicable) that meet the search criteria you entered in the **Team Member** field.

Team Members

Use this grid to view and select persons from a list of team members.

Field or Control	Description
 (Sort or Sort Team Members) button	Click to sort the employees by column headings. A colored sort icon button indicates that you have specified one of these grid sorts.
☐ (Select All) or (Select this row) check box, and **Continue** button	(For selecting multiple employees) The **Select** check box appears for transactions where you can select groups of individuals for whom you will perform the transaction. Select the check box in the header to select all team member rows. To select a specific set of team members, select the check box for each team member row to include the employee in the transaction. Selecting an employee does not select that employee's direct reports. **Important:** If you change the team member list, either by navigating to a different level of the reporting hierarchy or by performing a search, any previous selection is cleared. This behavior keeps you from losing track of who has been selected—the only selected employees are those who are selected in the currently shown list. After selecting employees, the manager clicks the **Continue** button to access the transaction for all the selected employees. For example, a manager can transfer multiple employees to a new location at the same time.
Employee Photo	Displays the photo for the employee when the **Display on Self Service** option is enabled on the Installation Table – HCM Options Page.

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Field or Control	Description
<**Number**> **Directs** link	When a person has direct reports, the number of this person's direct reports appear as a link at the bottom left of the person's row. Click the link to drill down and have the page display a list of this person's direct reports. When managers drill down into the reporting hierarchy, breadcrumbs appear above the Team Members grid to show the management hierarchy from the user to the currently displayed group of employees. Select a person's name in the breadcrumbs to navigate back to that person's list of direct reports. When managers view their own direct reports, no breadcrumbs appear. **Note:** Indirect report information appears if the **Allow Indirect Reports** option is enabled on the Direct Reports Transaction Configuration Page for the PeopleSoft Fluid User Interface - Manager Self-Service transaction.
More and **Less** link	(Smartphone) Click the **More** link to view additional job information about the employee. Click the **Less** link to hide the additional job information about the person.
HR Status	The **HR Status** field appears on the Employee Selection Criteria page only if the **Allow Indirect Reports** check box is selected on the Direct Report Transaction Configuration page Inactive employees can have active employees reporting to them directly or indirectly.
 (Select) button	(For selecting an individual employee) Click this button to access the transaction page for this person.

Configuring Person Search

To configure the person search, use the Configure Person Search (HR_PSS_CONFIG) component

These topics provide an overview of simple person search and discuss how to configure, test, and view person search.

To configure and view direct report searches where mangers can select from a list of their own team members, see the Configuring Direct Reports Functionality documentation.

Pages Used to Configure Simple Person Search

Page Name	Definition Name	Usage
Configure Simple Person Search Page	HR_PSS_CONFIG	Configure components for simple person search.

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Page Name	Definition Name	Usage
Invoke Person Search API Page	HR_PSS_TEST_API	Test simple person search within the context of an application using the classic version of the Person Search.
(Classic) Person Search Page	HR_PSS_SEARCH	Search for and select a person. This page is invoked from several calling applications when using the classic pages.
(Fluid) Person Search Page	HR_PSEL_FLU	View and select from a list of persons to perform a transaction using the fluid pages.

Understanding Simple Person Search

This page enables users of an application to search for and select a person to process. Using this component, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select.

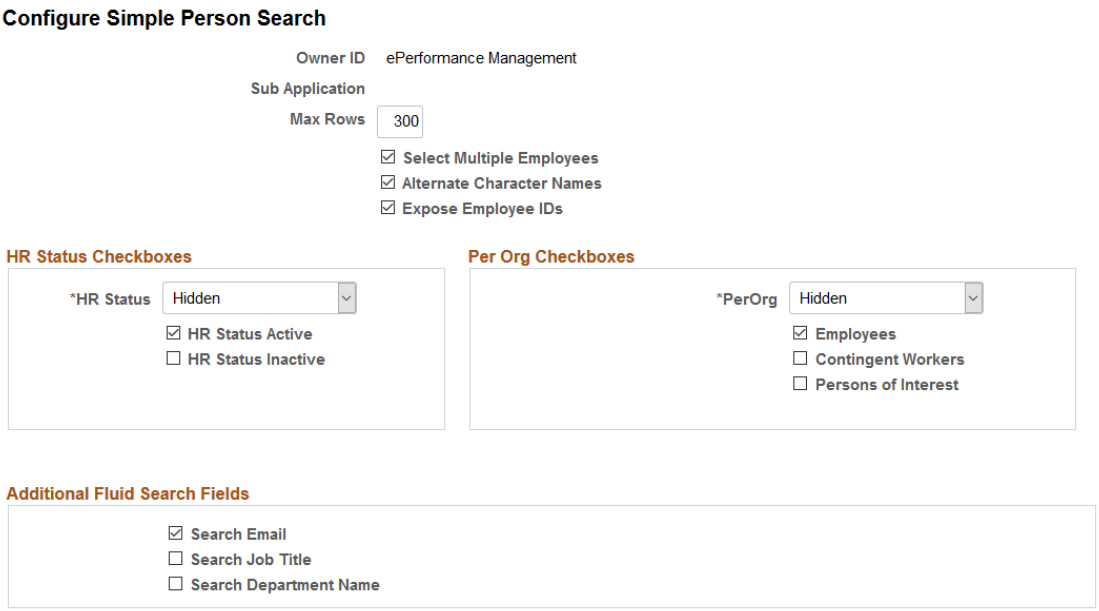
Configure Simple Person Search Page

Use the Configure Simple Person Search page (HR_PSS_CONFIG) to configure components for simple person search.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Person Search Match**, and then **Configure Simple Person Search**, and then **Configure Simple Person Search**

This example illustrates the fields and controls on the Configure Simple Person Search page. You can find definitions for the fields and controls later on this page.



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You select the options that govern how an application searches for and returns person information on the Simple Person Search page within an application.

Field or Control	Description
Max Rows (maximum rows)	Enter the maximum results rows to return to the calling application. Any rows that meet the search criteria are returned and appear in the results list. If a search returns more than the maximum number of rows, the user is prompted with a message that the search returns more than the maximum number of people and asks them to narrow the search.
Select Multiple Employees	Select to enable the user to select more than one person from the search results. If you select this field, a check box appears next to the names in the results list, otherwise a radio button appears.
Alternate Character Names	Select to enable the user to search for names by entering the search string in alternate character format. If you configured the system to enable the entry of names in alternate character format, this check box is selected by default.
Expose Employee IDs	Select to have the person's ID appear in the results details. This field is deselected by default.

HR Status Checkboxes

Use this group box to define HR Status settings.

Field or Control	Description
HR Status	Select one of these values: • *Hidden* HR status values for the persons found by the search do not appear in the results list. • *Display Only* HR status values for the persons found by the search appear in the results list. • *Enterable* (Classic pages only) Enables the user to select the HR status values to include in the search. The status options appear as check boxes on the classic Person Search page. (Fluid) For fluid pages, this works the same as the *Display Only* option. The user cannot select which statuses should appear in the search but will see the HR status of the workers in the search results.
HR Status Active	Select to return rows for active workers. This check box is selected by default.
HR Status Inactive	Select to return rows for inactive workers.

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Per Org Checkboxes

Use this group box to define person organizational relationship settings.

Field or Control	Description
PerOrg (person organizational relationship)	Select one of these values to control how the person's relationship to the organization is managed on the Person Search page: • *Hidden* The organizational relationship of the persons found by the search do not appear in the results list. • *Display Only* The organizational relationship for the persons found by the search appear in the results list. • *Enterable* (Classic pages only) Enables the user to select the person organizational relationships to include in the search. The org relationship options appear as check boxes on the classic Person Search page. (Fluid) For fluid pages, this option works the same as the *Display Only* option. The user cannot select which relationships should appear in the search but will see the organizational relationship of the workers in the search results.
Employees	Select to return employees in the search results. This field is selected by default.
Contingent Workers	Select to return contingent workers, for example, temps or contractors, in the search results.
Persons of Interest	Select to return other persons of interest, for example, retirees or job applicants, in the search results.

Additional Fluid Search Fields

Use this group box to define search options.

Field or Control	Description
Search Email	Select this option to allow a user to search for a person using their email.
Search Job Title	Select this option to allow a user to search for a person using their job title.
Search Department Name	Select this option to allow a user to search for a person using their department.

Invoke Person Search API Page

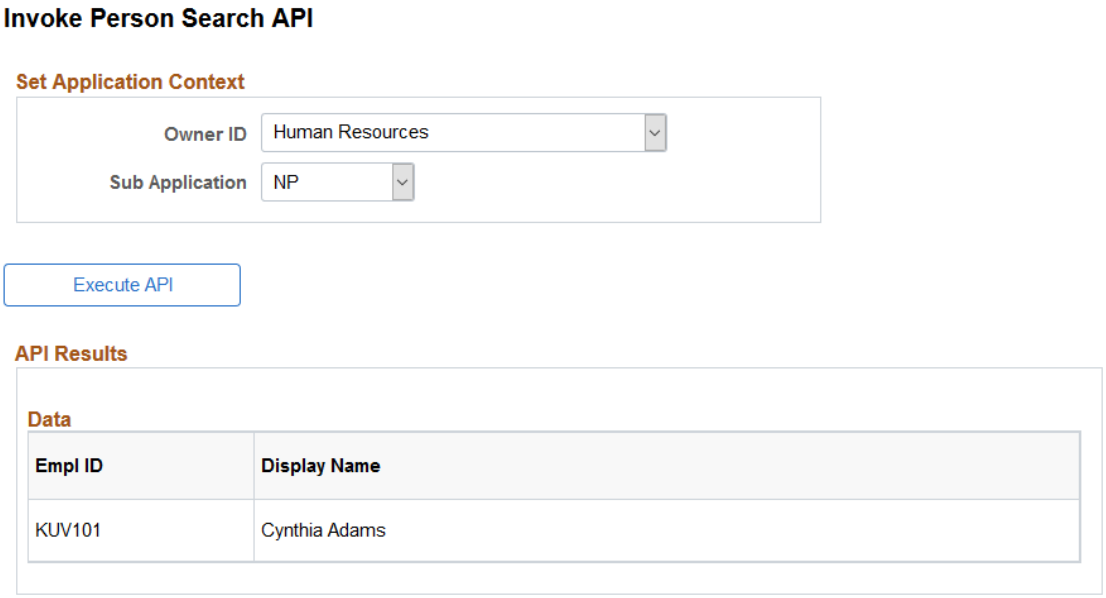
Use the Invoke Person Search API page (HR_PSS_TEST_API) to test simple person search within the context of an application.

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Navigation:

Set Up HCM, and then **Common Definitions**, and then **Person Search Match**, and then **Invoke Person Search API**, and then **Invoke Person Search API**

This example illustrates the fields and controls on the Invoke Person Search API page. You can find definitions for the fields and controls later on this page.



This page enables you to test the configuration of the Simple Person Search page within the context of an application and sub application that you select. When you click **Execute API** the search page is rendered as you configured it for the application. You can enter any search criteria to view how the results appear.

(Classic) Person Search Page

Use the Person Search page (HR_PSS_SEARCH) to search for and select a person.

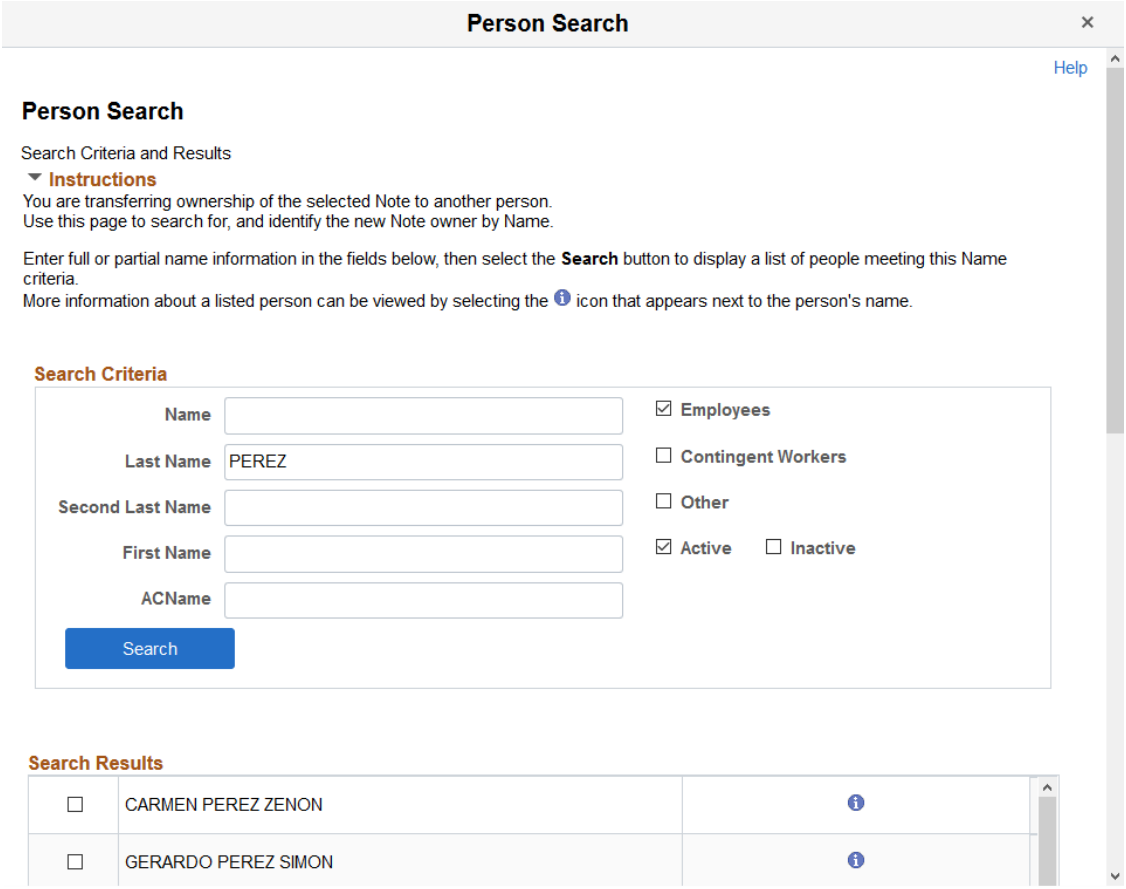
This page is invoked from several calling applications when using the classic pages.

Navigation:

Select an **Owner ID** value and click the **Execute API** button on the Invoke Person Search API page.

This example illustrates the Person Search - Simple page.

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The options on this page vary based on the configuration setup on the Configure Simple Person Search Page.

Search Criteria

Field or Control	Description
Employees, **Contingent Worker**, and **Other**	When the **PerOrg** option on the configuration is set up as: • *Enterable*—select the organizational relationships you want returned in your results. • *Display Only*—the page displays which relationships will be returned in your search results, but you cannot change these settings. • *Hidden*—these search criteria options will not appear on the page. The search will use the configuration settings to return results.

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Field or Control	Description
Active and **Inactive**	When the **HR Status** on the configuration is set up as: • *Enterable*—select the HR statuses of workers you want returned in your results. • *Display Only*—the page displays which HR statuses will be returned in your search results, but you cannot change these settings. • *Hidden*—these search criteria options will not appear on the page. The search will use the configuration settings to return results.

Search Results

Field or Control	Description
Radio button	The radio button appears when the transaction applies to one individual. Users select this button to chose an individual to view.
Select check box and **OK** button	The **Select** check box appears for transactions where you can select groups of individuals for whom you will perform the transaction. After selecting employees, click the **OK** button to perform the transaction for all the selected employees.
(Details) icon	Click the Details icon to view additional information about a person.

(Fluid) Person Search Page

Use the Person Search modal page (HR_PSEL_FLU) to view and select from a list of persons to perform a transaction using the fluid pages.

> **Note**
>
> The title of this page is configurable through the text catalog. Some pages in the system are configured to show Select an Employee in the modal banner.
>
> The Select an Employee page uses the fluid Person Search component to create the fluid interface based on the Configure Simple Person Search setup.

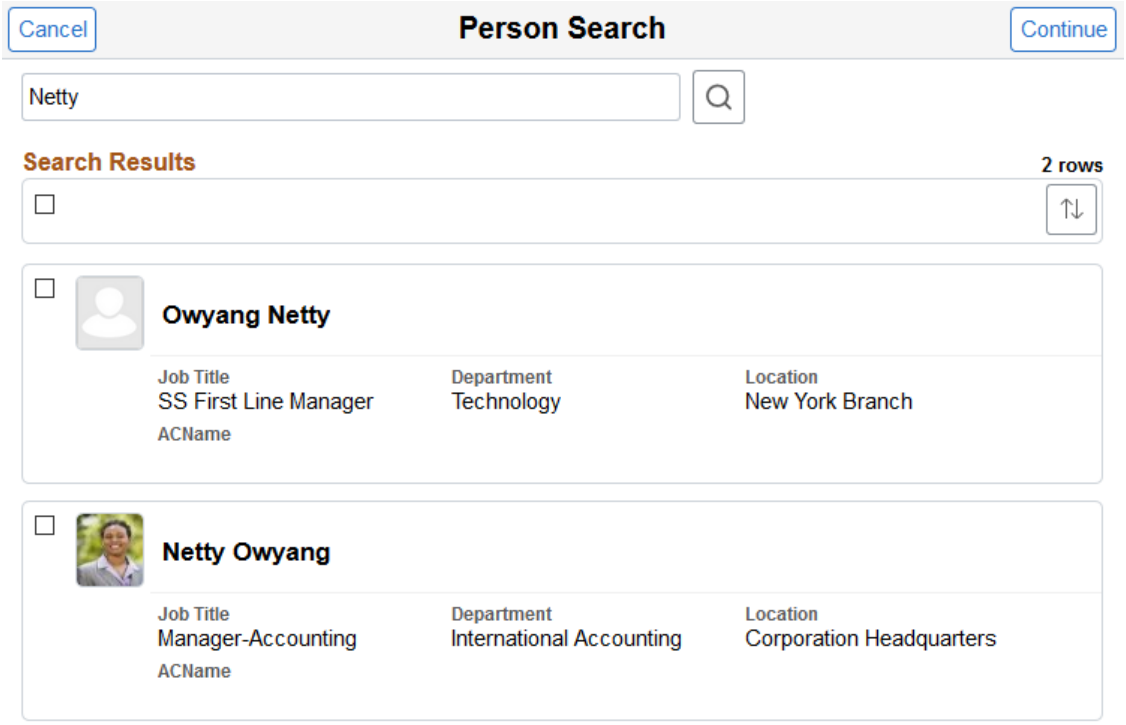
> **Note**
>
> Unlike the (Fluid) <Transaction Name> - Find Team Member Page, the search results for these pages are not limited to the logged in user's direct or indirect reports.

Navigation:

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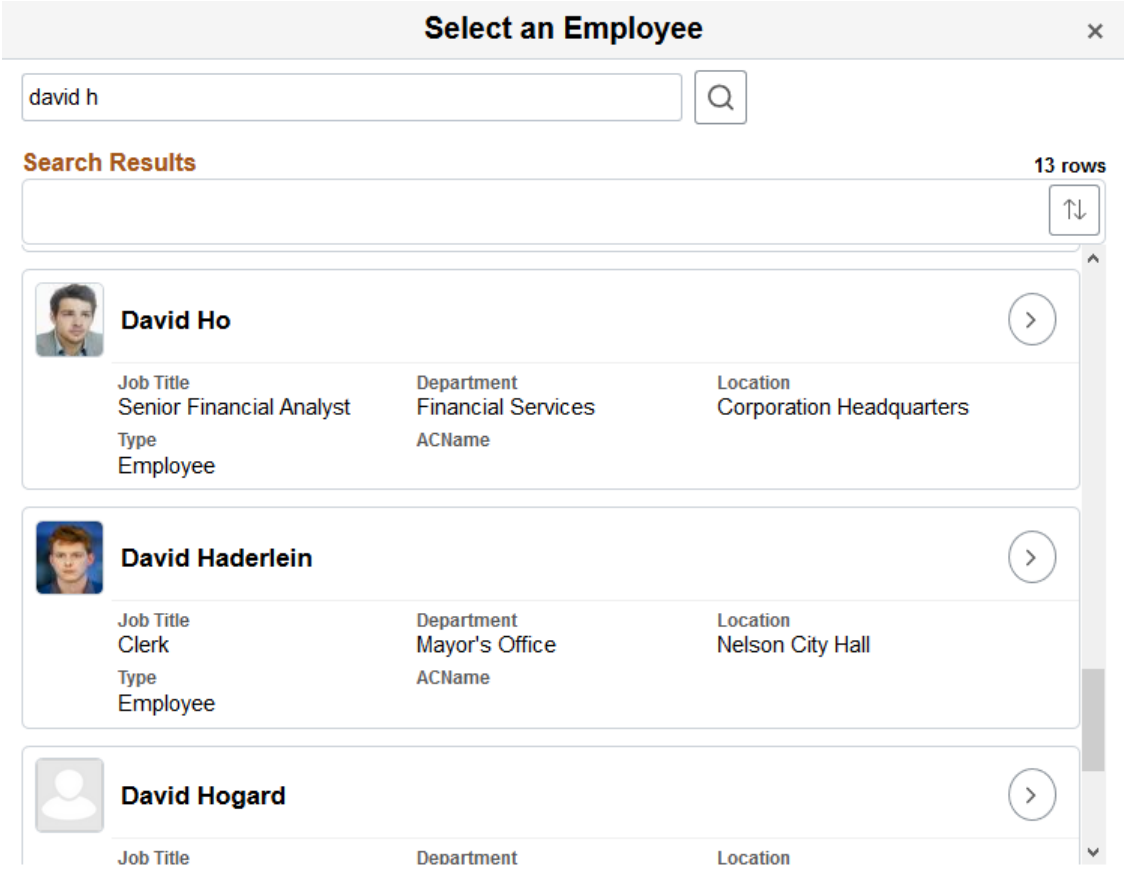
Select a transaction component that requires you to select from a list of individuals to perform a transaction.

This example illustrates the Person Search modal page when using fluid. This example also displays the Select check boxes, where you can select multiple employees when performing a transaction.



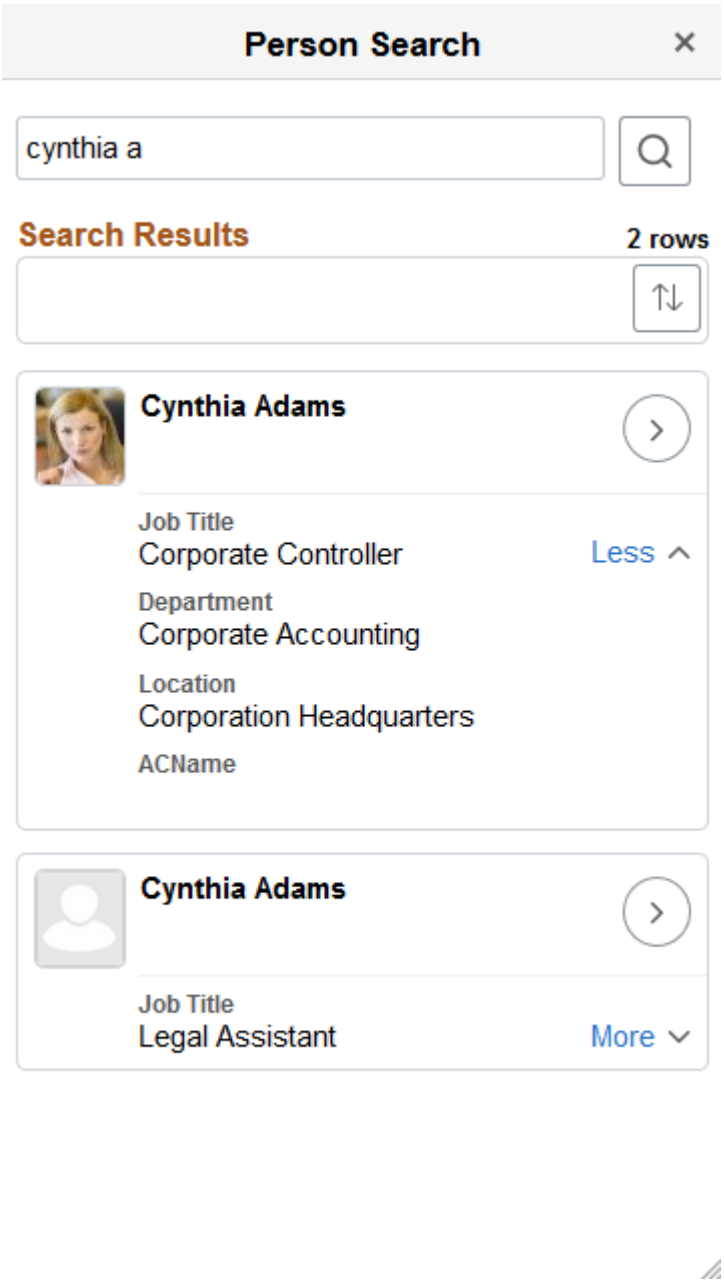
This example illustrates the page in fluid when the Select an Employee appears in the modal banner.

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This example illustrates the Person Search page using a small form factor device like a smartphone. The page for a smartphone displays a similar page format as a larger form factor device.

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This page enables users of an application to search for and select a person to process.

Field or Control	Description
Search field and button	Use the top section of this page to enter search criteria to narrow your results. In addition to a person's name, administrators can setup the Configure Simple Person Search Page to include AC name, email, job title, or department in the search. Click the search button to have the system display a list of people that meet the search criteria you entered in the **Search** field.

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Search Results

Use this grid to view and select persons from a list of individuals that meet the search criteria.

The results rows will display department and location information to help identify the individual.

Field or Control	Description
☐ (Select All) or (Select this row) check box, and **Continue** button	The **Select** check box appears for transactions where you can select groups of individuals for whom you will perform the transaction. Select the check box in the header to select all rows. To select a specific set of people, select the check box for each individual row. To select a specific set of team members, select the check box for each team member row to include the employee in the transaction. Selecting an employee does not select that employee's direct reports. **Important:** If you change the team member list, either by navigating to a different level of the reporting hierarchy or by performing a new search, any previous selection is cleared. This behavior keeps you from losing track of who has been selected—the only selected employees are those who are selected in the currently shown list. After selecting people, the user clicks the **Continue** button to access the transaction for all the selected individuals. For example, a user can add multiple people to a matrix team at the same time.
Employee Photo	Displays the photo for the employee when the **Display on Self Service** option is enabled on the Installation Table – HCM Options Page.
More and **Less** link	(Smartphone) Click the **More** link to view additional job information about the employee. Click the **Less** link to hide the additional job information about the person.
 (Select) button	Click this button to access the transaction page for this person.

Related Topics

- Configure Simple Person Search Page
  Use the Configure Simple Person Search page (HR_PSS_CONFIG) to configure components for simple person search.
- Configure Simple Person Search Page
  Use the Configure Simple Person Search page (HR_PSS_CONFIG) to configure components for simple person search.

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Setting Up Mouse Over Popups

To set up the employee mouse over pop up page, use the MouseOver Field Definition (HR_MO_FLDNM_TBL), MouseOver Page Design (HR_MO_TBL), and MouseOver Component Setup (HR_MO_COMPONENTS) components.

These topics provide an overview of the mouse over popup page, employee photos and the mouse over popup page, and discuss how to set up the mouse over popups on the application pages.

Pages Used to Configure the Employee Mouse Over Page

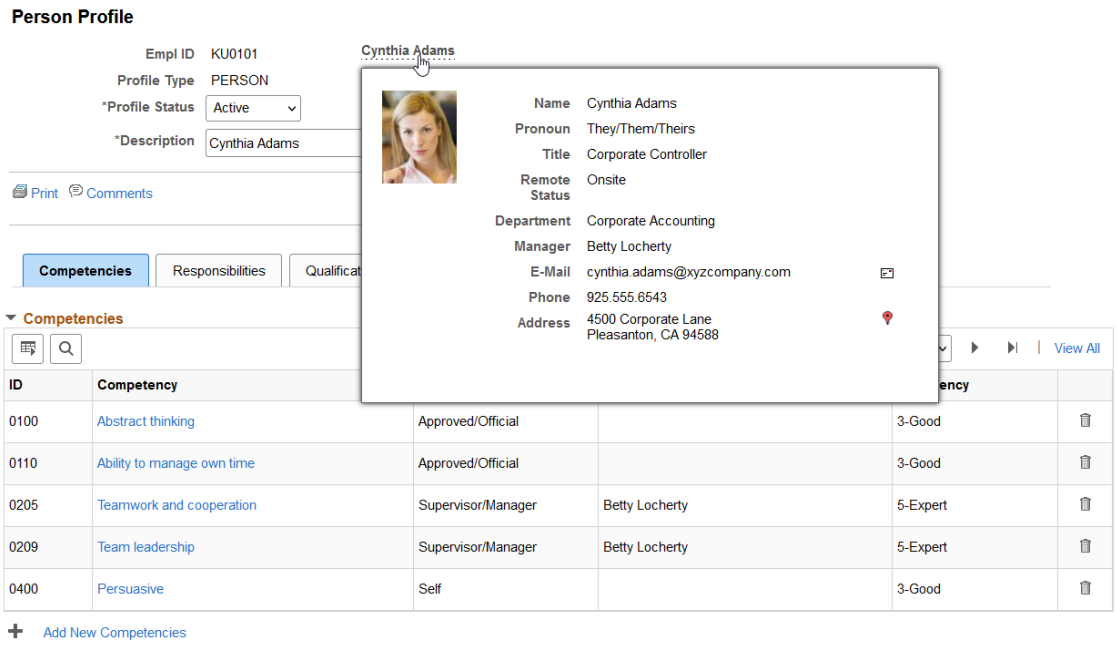
Page Name	Definition Name	Usage
MouseOver Field Definition Page	HR_MO_FLDNM_TBL	Define mouse over popup fields and supporting fields that will be available in the MouseOver Page Design component and can be used with the mouse over popup page. Only the fields delivered as system data will be retrieved by the mouseover popup application class.
Mouse Over Column 1 Page (Mouse Over Column 1 and Mouse Over Column 2 Pages)	HR_MO_CL1_TBL	Create mouse over page designs by defining the fields for the first column of the mouse over popup page.
Mouse Over Column 2 Page (Mouse Over Column 1 and Mouse Over Column 2 Pages)	HR_MO_CL2_TBL	Create mouse over page designs by defining the fields for the second column of the mouse over popup page.
MouseOver Component Setup Page	HR_MO_COMP_SETUP_1	Enable the mouse over popup page for a component. Define the components which will utilize the Mouse Over Popup feature. This setup will define the popup type, the mouse over ID to be used with the component, and the owner and sub owner ID, if needed.
MouseOver Component Setup - Person Detail Page	HR_MO_COMP_SETUP_2	Indicate the ID field to retrieve the mouse over page.

Understanding the Mouse Over Popup Page

The Mouse Over Popup feature enables you to quickly see additional employee or applicant information by pausing on a person's name or ID that has a dotted line under it, as shown in this example.

Example of the mouse over popup page.

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The PeopleSoft HCM application provides you with the flexibility to configure this mouse over popup page in a way that is useful to you or other groups within your organization. You may want to set up a popup page that includes employee information such as a picture, job title, department, supervisor's name, and work location. Or, when performing certain business processes, you may find it beneficial to have a popup page that includes contact information, such as an email for an employee or applicant. You can even associate this email contact information with an icon that, by clicking, will initiate an email notification.

Create different mouse over popup page designs to associate with a specific product, feature, or user role; or share the same design across multiple products. For example, you may want to view information regarding an employee's benefit selections on one page while on another page you may find it more beneficial to view the employee's holiday schedule.

Mouse Over Popup Page Layout and Design

Use the MouseOver Page Design component to identify mouse over IDs, which define the fields and number of columns that should appear on a given mouse over popup page. The system delivers these three layout designs that enable you to display pages differently:

- One column of data (HR_MO_DSP_1_POP)
- Two columns of data (HR_MO_DSP_1_2_POP)
- An employee picture in one column and a second column of data (HR_MO_DSP_P_2_POP)

Each column can include up to seven fields. However, when you include an employee's picture on the mouse over popup page, the image will display in column 1 and no other fields will appear in that column.

The PeopleSoft application delivers these mouse over IDs:

Mouse Over ID	Description
APPLICNT_INFO_1	Applicant Information – Two columns of data
APPLICNT_INFO_2	Applicant Information – One column of data

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Mouse Over ID	Description
EMPLOYEE_INFO_1	Employee Information – Employee Picture and one column of data on column 2
EMPLOYEE_INFO_2	Employee Information – Two columns of data
EMPLOYEE_INFO_3	Employee Information – One column of data
EMPLOYEE_INFO_4	Employee Information – One column of data using the formal name

> **Note**
>
> We recommend that if you want to use a variation of one of these delivered mouse over IDs that you insert a row in the MouseOver Page Design for the ID and use the **Owner ID** and **Sub ID** fields. Do not modify the delivered value other than by inserting a row and using the owner field, since other applications may be using the delivered value. Changes to the delivered ID can affect other application currently using the mouse over ID.

Prior to creating your mouse over popup page designs, you must identify the fields that can be included on the page in the MouseOver Field Definition component. The PeopleSoft application delivers these predefined fields:

Applicant Data	Person and Job Data
• APPLID (Applicant ID) • APP_ADDRESS (Applicant Address) • APP_EMAIL (Applicant Email) • APP_EMAIL_PRF (Applicant Email Preferred) • APP_EMPLID (Applicant Employee ID) • APP_NAME (Applicant Name) • APP_PERSON_ID (Applicant Person ID) • APP_PER_STATUS (Applicant Type) • APP_PHONE (Applicant Phone) • APP_PHONE_PRF (Applicant Phone Preferred) • APP_POI_TYPE (Applicant POI Type) • APP_PERF_CONT (Applicant Preference Contact) • APP_STATUS_CODE (Applicant Status Code) • APP_STATUS_REASON (Applicant Status Reason)	• ADDRESS (Address) • BUSINESS_UNIT (Business Unit • COMPANY (Company) • DEPTID (Department) • EMAIL (Email) • EMPLID (Person ID) • EMPL_STATUS (Payroll Status) • ESTABID (Establishment ID) • FULL_PART_TIME (Full/Part Time Status) • GRADE (Grade) • HR_STATUS (HR Status) • JOBTITLE (Job Title) • LOCATION (Location) • MANAGER_ID (Manager) • NAME (Employee Name) • NAME_DISPLAY (Display Name) • NAME_FORMAL (Formal Name) • PAYGROUP (Pay Group) • PHONE (Phone) • PRONOUN (Pronoun) • REG_REGION (Regulatory Region) • REMOTE_STATUS (Remote Status) • SAL_ADMIN_PLAN (Salary Plan) • STD_HOURS (Standard Hours) • STEP (Salary Step)

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> **Warning**
>
> Adding other fields is considered a customization and requires modifications to the Application Package/Class (HR_MO_COMMON: SET_UP_COMMON) PeopleCode that is used to retrieve the data associated with any new fields.

PeopleTools Application Designer Setup

The majority of the setup for the mouse over popup page is done through delivered PIA setup pages in the HCM system. However, the Mouse Over Popup properties must also be set within the page field properties within Application Designer by enabling the page popup and selecting the page layout, which is identified in the MouseOver Page Design component, **Suggested Popup Page** field. When mouse over popup is set up, the system places the mouse over indicator of a dotted underline under the field, which will initiate the popup.

> **Note**
>
> The Mouse Over Popup feature can be applied to many different pages within HCM as long as the employee or applicant ID is located at level 0 in the record structure.

> **Important**
>
> When you have set up a page field property for use with the mouse over popup, and this page is used in a component, the mouse over indicator will be present on the page. If this page exists in multiple components and each of those components has not been properly setup then the user will receive a message indicating so.

For more information about page levels and enabling mouse over popup pages, see the product documentation for *PeopleTools: Application Designer Developer's Guide*.

Understanding Employee Photos and the Mouse Over Popup Page

You can configure the system to enable managers to see the employee photo and employee details on manager self-service mouse over popup pages. However, the PeopleSoft system already displays an employee photo on various self-service transaction pages if the **Display on Self Service** check box is selected on the Installation Table - HCM Options Page. When both the employee photo and mouse over popup are available on a page, the system displays the employee photo in the header section next to the employee name and the delivered mouse over component setup for these pages is configured to use a mouse over ID that does not include an employee picture. This is done on the MouseOver Component Setup Page.

This table lists the Manager Self Service pages that are delivered to display an employee photo in the header when enabled on the Installation Table but also contain a mouse over popup, and are therefore configured to use a mouse over ID that does not use a picture.

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Manager Self Service Menu Group	Transaction Page
Job and Personal Information	View Employee Personal Info Promote Employee Approve Promotion View Promotion Status Transfer Employee Approve Transfer View Transfer Status Retire Employee Approve Retire View Retire Status Terminate Employee Approve Terminate Employee View Terminate Employee Status Job Change Request Review Job Change Request Change Full/Part Time Status Approve Full Part Status View Full Part Change Status Approve Location Change View Location Change Status
Compensation and Stock	Request Ad Hoc Salary Change View Compensation History
Career Planning	Manage Career Plans

When the **Allow Employee to Upload Photo** option is selected on the Installation Table - HCM Options Page, the employee can determine which photo option appears in the header section: the HR system photo, and personal uploaded photo, or a dummy default photo.

MouseOver Field Definition Page

Use the MouseOver Field Definition page (HR_MO_FLDNM_TBL) to define mouse over popup fields and supporting fields that will be available in the MouseOver Page Design component and can be used with the mouse over popup page.

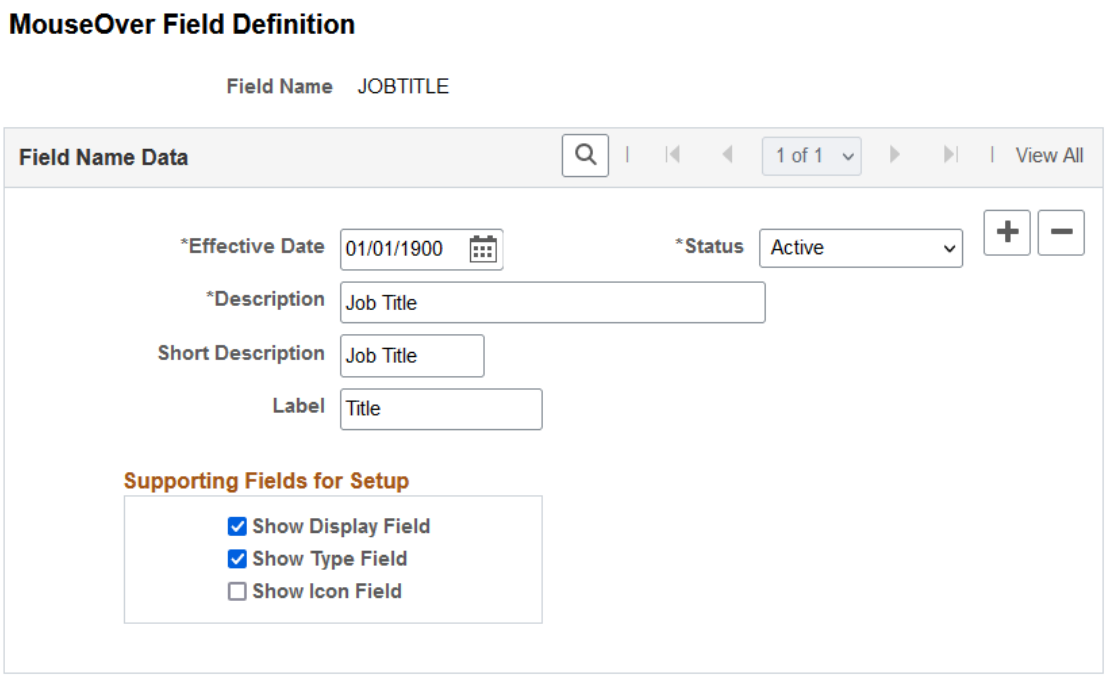
Only the fields delivered as system data will be retrieved by the mouseover popup application class.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Mouse Over Popup**, and then **MouseOver Field Definition**, and then **MouseOver Field Definition**

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

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Define the fields that are configured for use with the mouse over popup page. PeopleSoft HCM delivers numerous fields with this feature. Adding any other fields would be considered a customization and will require PeopleCode modifications to the Application Package/Class (HR_MO_COMMON: SET_UP_COMMON) that is used to retrieve the data associated with any new fields.

> **Note**
>
> Only the fields delivered as system data will be retrieved by the mouseover popup application class. Any new fields added to the component require modifications to HR_MO_COMMON application package in order to retrieve the data.

Field or Control	Description
Field Name	Define a field name that should be available for entry on the MouseOver Page Design pages when creating the design of the mouse over popup page for the user. The PeopleSoft application delivers several predefined fields for the mouse over popup page. See Understanding the Mouse Over Popup Page.
Label	Define the default label name that will appear on the mouse over popup page. The value you enter here will supply the default value for the **Label** field on the Mouse Over Column 1 and 2 page but can be overwritten on that page.

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Supporting Fields for Setup

Field or Control	Description
Show Display Field	Select this check box to have the **Display** field appear on the Mouse Over Page Design pages for this field. You use the **Display** field to specify whether the field value on the mouse over popup page should display the code, the description, or both the code and description for the user. For example, you can determine whether to have the **Department** field display the department code of *11000*, the department description of *Accounting*, or both the code and description *11000 Accounting*.

Field or Control	Description
Show Type Field	Select this check box to have the **Field Type** field appear on the Mouse Over Page Design pages for this field. You use the **Field Type** field when the field can have different types of the same data. For example, you may have a phone type of *Home*, *Business*, or *Other* for a person.

Field or Control	Description
Show Icon Field	Select this check box to have the **Icon ID** field appear on the Mouse Over Page Design pages for this field. You use the **Icon ID** field when the field can have an image associated with a field. For example, you may want to have an email field with an icon image that when selected will take the user to another window and bring up their email software. **Note:** The PeopleSoft application is set up to support email field icons. You will need to make modifications to PeopleCode to use other types of software.

Mouse Over Column 1 and Mouse Over Column 2 Pages

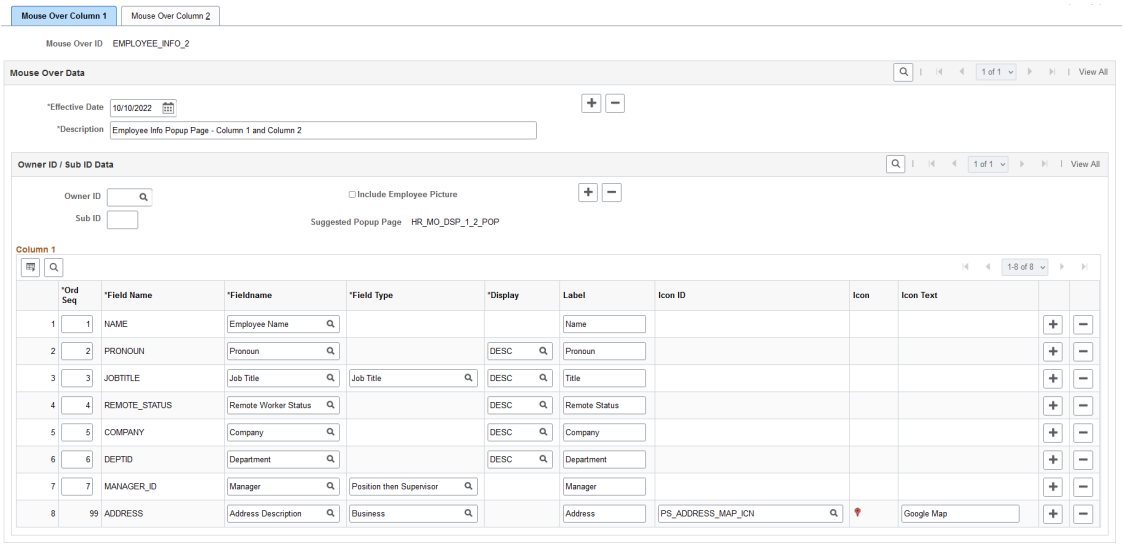
Use the Mouse Over Column 1 page (HR_MO_CL1_TBL) to create mouse over page designs by defining the fields for the first column of the mouse over popup page.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Mouse Over Popup**, and then **MouseOver Page Design**, and then **Mouse Over Column 1**

This example illustrates the fields and controls on the Mouse Over Column 1 page. You can find definitions for the fields and controls later on this page.

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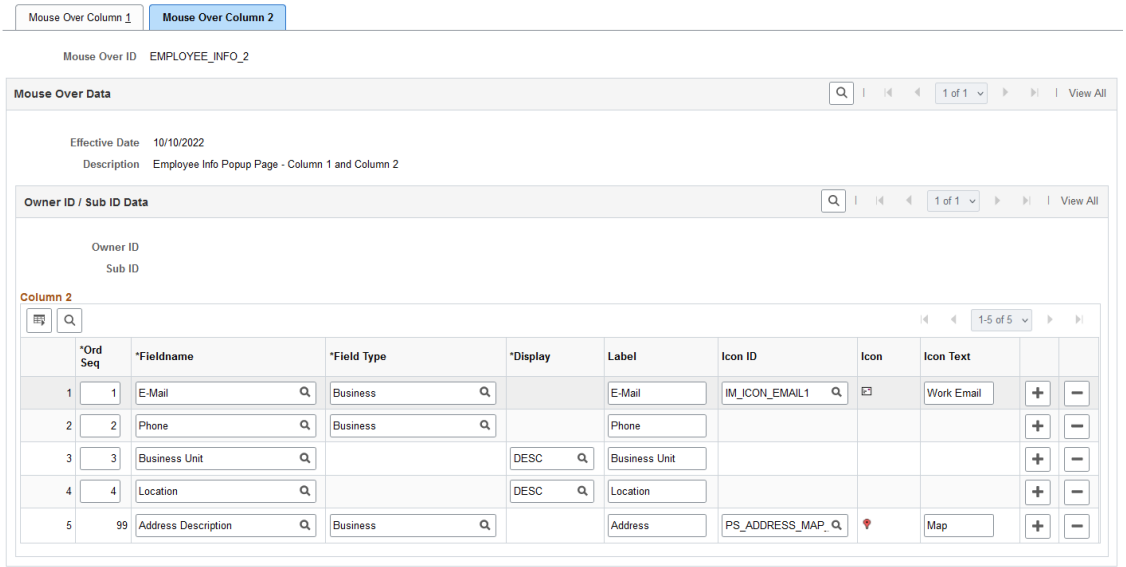


Use the Mouse Over Column 2 page (HR_MO_CL2_TBL) to create mouse over page designs by defining the fields for the second column of the mouse over popup page.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Mouse Over Popup**, and then **MouseOver Page Design**, and then **Mouse Over Column 2**

This example illustrates the fields and controls on the Mouse Over Column 2 page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> Set up the Mouse Over Column 2 page the same way you set up the Mouse Over Column 1 page with the exception of the **Owner ID / Sub ID Data** fields. The **Include Employee Picture** check box and the **Popup Page** field are available on the Mouse Over Column 1 page only. The **Owner ID** and **Sub ID** fields are display only on the Mouse Over Column 2 page.

When creating a mouse over popup page, you can define fields to display in column 1 only, column 2 only, or both columns 1 and 2.

Field or Control	Description
Mouse Over ID	Enter a mouse over ID that defines this unique mouse over popup page layout. You will associate this code with each component that should use this mouse over popup layout. For information about delivered mouse over IDs, see Understanding the Mouse Over Popup Page.

Owner ID / Sub ID Data

This level enables the system to display different items on the mouse over popup page for owners and sub owners. You can have several different owner IDs and page structures associated with the same mouse over ID.

Field or Control	Description
Owner ID	Enter an owner ID when there are different views of the same popup page for different owners. For example, use this field when a group or applications want to use the same mouse over ID but would like to change the data details of an existing ID. If you do not specify an owner id, the system uses the most recently effective mouse over ID for the display of the page. When you associate the mouse over ID with a component on the MouseOver Component Setup page, you can also enter the owner ID to specify the unique mouse over popup page design for this owner.

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Field or Control	Description
Include Employee Picture	Select this check box to have the popup page display the employee picture, if available. When this check box is selected, the Column 1 fields are unavailable for entry and the system displays a message that no other data will display in column 1 other than the picture. **Note:** This field is only available on the Mouse Over Column 1 page and will display employee only pictures and should not be used for applicant mouse over popup pages. When the **Display Photo** option is deselected on the Installation Table - HCM Options Page, mouse over popup pages with **Include Employee Picture** selected will display a dummy photo.
Sub ID	Enter a sub owner ID in order for the system to display different views of the same pop up page for the different sub owners. If you do not specify an owner or sub owner id, the system uses the most recently effective mouse over ID for the display of the page. When you associate the mouse over ID with a component on the MouseOver Component Setup page, you can also enter the owner ID and sub owner ID to specify the unique mouse over popup page design for this owner or sub owner.
Suggested Popup Page	Displays the name of the page layout upon saving the page and determines which popup/ layout to apply to the page in application designer when using the selected mouse over ID. The page layouts identify a page with one column of data (HR_MO_DSP_1_POP), a page with two columns of data (HR_MO_DSP_1_2_POP), or a page that displays an employee's picture and one column of data (HR_-MO_DSP_P_2_POP).

Column 1 and Column 2

The fields in this grid box depend upon the **Fieldname** values you select and the supporting fields that you selected for this field name on the MouseOver Field Definition page. The fields and field detail data you enter on these pages determine how the system will display the mouse over popup page for the user.

> **Note**
>
> The system enables you to select up to seven field items per column.

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Field or Control	Description
Ord Seq (order sequence)	Enter a sequence number up to 98 for any field name except for address fields, which the system automatically assigns with the sequence number of 99. The layout of the mouse over page puts address fields at the bottom of the column because the system displays the address as two rows.
Field Name and **Fieldname**	Select the fields that should appear on the mouse over popup page. Values are defined on the MouseOver Field Definition page. When you enter a value in the **Fieldname** field, the **Field Name** value displays. The grid displays additional fields based upon the supporting fields that were selected on the MouseOver Field Definition page.
Field Type	Select a specific type of field value that should display when there may be more than one option available. For example, select whether to show the business phone number or the home phone number for the **Phone** field. This field is available when the **Show Type Field** check box is selected on the MouseOver Field Definition page for the field name.
Display	Identity how the system should display the field value to the user. You can choose to show the field value code *(CODE)*, the description of the field *(DESC)*, or display both the code and description in the field *BOTH*. For example, you can have the system display the job code *290000*, the description of the job *Clerk*, or have the system display both *290000 Clerk*. This field is available when the **Show Display Field** check box is selected on the MouseOver Field Definition page for the field name.
Label	Enter the label name that should appear for the user. The field value is provided by default from the MouseOver Field Definition page but can be overwritten on this page.
Icon ID	Specify the icon that should display for the user that will enable him or her to click and initiate contact with the person. For example, the user can click an email icon to have the system launch the email software The PeopleSoft application supports this functionality for contacting a person through email. This field is available when the **Show Icon Field** check box is selected on the MouseOver Field Definition page for the field name.
Icon	Displays the icon selected in the **Icon ID** field.
Icon Text	Specify text that should appear when the user places the mouse over the icon. The default value comes from the icon ID description but can be overwritten here. This field is available for entry after selecting a value in the **Icon ID** field.

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MouseOver Component Setup Page

Use the MouseOver Component Setup page (HR_MO_COMP_SETUP_1) to enable the mouse over popup page for a component.

Define the components which will utilize the Mouse Over Popup feature. This setup will define the popup type, the mouse over ID to be used with the component, and the owner and sub owner ID, if needed.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Mouse Over Popup**, and then **MouseOver Component Setup**, and then **MouseOver Component Setup**

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

MouseOver Component Setup

Setup Components for Use of MouseOver Popup

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	*Component Name	*Market	MouseOver Popup Type	Include Job	*Mouse Over ID	Owner ID	Sub ID	Person Detail		
1	AA_COST_RATE_JPN	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
2	AA_MGMT_JPN	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
3	ABSENCE_CALENDAR	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
4	ABSENCE_HISTORY	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
5	ABSENCE_VACATION	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
6	ABSV_PLANS	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
7	ABSV_REQUEST	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
8	ABSW_SCHEDULE	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
9	ABS_MATERNITY_UK	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−
10	ABS_PARENTAL_UK	GBL	Employee	☑	EMPLOYEE_INFO_1			Person Detail	+	−

Field or Control	Description
Component Name	Identify the component that will utilize the Mouse Over Popup functionality.
Market	Indicate the markets for the component. The mouseover popup key structure is by component, however, when different markets exist with the same component name you can differentiate them by market. For example, you differentiate between the Canada and United States balance arrears components by entering the market code of *CAN* in one row of the component name and *USA* in another row of the component name.
MouseOver Popup Type	Select the mouse over type that should be used within this component. Values are *Employee* and *Applicant.*

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Field or Control	Description
Include Job	Select this check box to enable the user to specify the employment record number if the data retrieved through the popup should be based on a particular employee record number. When you deselect this check box, the system uses the employee's current effective job data.
Mouse Over ID	Enter the mouse over ID that should be used in relation to this component. The mouse over ID determines the look of the mouse over popup page, which is defined in the MouseOver Page Design component. Manager self-service pages that already display an employee photo in the header are delivered to use a mouse over ID (EMPLOYEE_INFO_3) that does not use an employee photo. For a list of these delivered pages, see the Understanding Employee Photos and the Mouse Over Popup Page topic.
Owner ID and **Sub ID**	Enter an owner or sub owner ID when there are different views of the same popup page for different owners. If you do not specify an owner or sub owner id, the system uses the most recently effective mouse over ID for the display of the page.
Person Detail	Click this link to access the Person Detail page and enter the record name and field name that will initiate the mouse over popup page.

> **Note**
>
> The field properties for a page must be setup to use a mouse over popup page in the Application Designer. When this is done the system displays the dotted lines under the ID, indicating that the Mouse Over Popup functionality has been enable for the field. The system will display an error message if the component that contains the page has not been properly setup in the MouseOver Component Setup component.

For more information, see the product documentation for *PeopleTools: PeopleSoft Application Designer Developer's Guide.*

MouseOver Component Setup - Person Detail Page

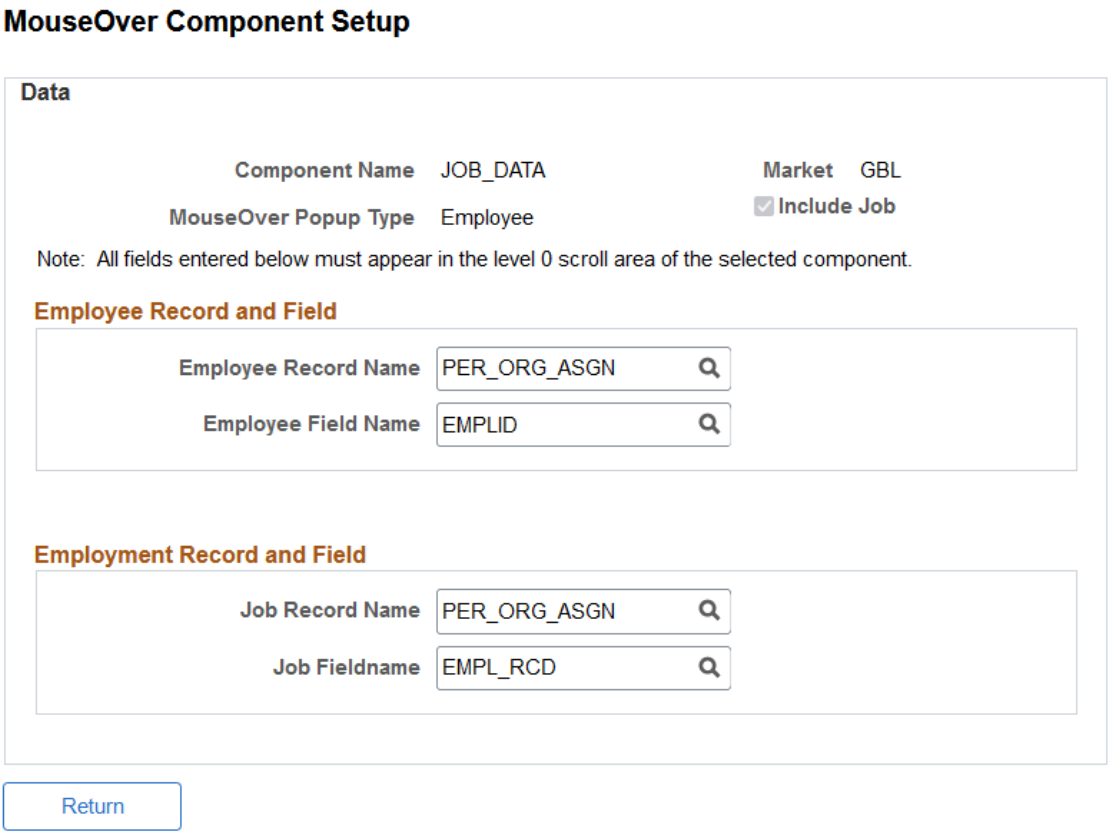
Use the MouseOver Component Setup - Person Detail page (HR_MO_COMP_SETUP_2) to indicate the ID field to retrieve the mouse over page.

Navigation:

Click **Person Detail** on the MouseOver Component Setup page.

This example illustrates the fields and controls on the MouseOver Component Setup - Person Detail page. You can find definitions for the fields and controls later on this page.

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Employee or Applicant Record and Field

If the **Include Job** check box is not selected on the MouseOver Component Setup page, the system will only these fields for entry.

Field or Control	Description
Employee Record Name or **Applicant Record Name**	Enter the record in the selected component that the system will use to retrieve the employee or applicant information.
Employee Fieldname or **Applicant Fieldname**	Specify the field from the record identified in the **Employee/Applicant Record Name** field that will invoke the mouse over popup page and retrieve the employee or applicant information.

Important

The field that will be used to retrieve the applicant or employee information must be at level 0 in the component and the Mouse Over Popup properties must also be set within the page field properties within the Application Designer.

For more information, see the product documentation for *PeopleTools: PeopleSoft Application Designer Developer's Guide.*

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Employment Record and Field

These fields appear when the **Include Job** check box is selected for the component on the MouseOver Component Setup page when the mouse over popup type is *Employee.*

Field or Control	Description
Job Record Name	Enter the name of the record of the selected component that the system will use to retrieve job related information specific to an employment record number.
Job Fieldname	Enter the name of the field in the job record which the system will use to retrieve job related information specific to an employment record number.

> **Note**
>
> The record and field must be at level 0 of the component.

Setting Up and Working with the Card Traverser

The Card Traverser tool enables managers to navigate between a list of employees while performing transactions, such as managing team time or absences. The traverser displays information, like employee images and job titles, allowing managers to select the next employee based on those details.

To setup and use the card traverser for system pages, use the Configure Traverser (HCSC_TR_CONF_FLU) and Traverser Component Mapping (HCSC_TR_PNLCFG_FLU) components.

This topic provides an overview of the card traverser, lists supported components, and discusses pages used to set up card traverser.

Pages Used to Set Up Card Traverser

Page Name	Definition Name	Usage
Traverser Configuration Page	HCSC_TR_CONF_FLU	Set up card traverser configuration IDs.
Traverser Component Mapping - Component Mapping Page	HCSC_TR_PNLCFG_FLU	Map card traverser IDs to components in the system.

Understanding Card Traverser

Card Traverser provides a simple way for managers to easily traverse between lists, like employee's, while working on a transaction page. The traverser cards can be configured to show details to help identify the data so manager's know to select the item to take further action.

When you first open a transactional page that is configured to show the card traversal, the card carousel appears collapsed in the upper right-hand corner of the sub header.

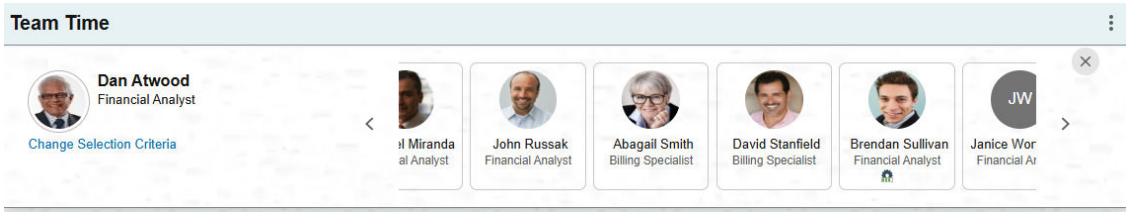
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This example illustrates the Card Traverser feature on the Team Time dashboard.



Select the Traverser to expand the carousel.

This example illustrates the Card Traverser feature on the Team Time dashboard.



Use the **> (Previous)** and **> (Next)** arrows to navigation through the list of employees.

> **Note**
>
> Available cards are based on the search results. If your search results returned only one item, the traverser will not appear on the transaction page.

Based on the configuration settings, each card can display a photo and up to three rows of key information to help identify the appropriate person. One row is designated to show up to three action icons per card. If you set up the traverser to display an employee photo and it isn't available, the card will display the employee's first and last name initials. Oracle provides a sample application class that displays the employees photo, name, job title, and action required icons that can show a reported time requiring approvals icon as well as an exceptions icon. With this configuration, selecting an employee card dynamically updates the page or dashboard to reflect that employee’s information.

Select the **Close (X)** icon in the right-hand corner to collapse the traverser.

Setting Up Traversal

To enable user's to access the traversal feature on a transaction page:

1. Set up data sources for the Traverser.
   For information on configuring the Traverser and data sources, see the “Traverser Implementation” technical brief, knowledge article KB883417 on My Oracle Support.
2. Set up card traverser configurations on the Traverser Configuration Page.
3. Map the configuration IDs to component pages using the Traverser Component Mapping - Component Mapping Page.
4. Users access the component to which the traverser has been added.

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> **Note**
>
> Traverser requires PeopleTools 8.56 or higher and is currently supported only in large form factor.

Traverser Supported Components

In order to add the traverser to a Fluid page, an area for the traverser should be enabled in the header.

PeopleSoft HCM currently delivers and supports the following Fluid components and traverser configuration IDs:

Product	Configuration ID	Component
Absence Management	MANAGE _ABS	HGA_SS_BAL_FLU HGA_SS_REQCAN_FLU HGA_SS_REQHIST_FLU HGA_SS_REQ_FLU
Time & Labor	TEAM_TIME	TL_COMPLEAVBAL_FLU TL_DSHBD_HDR_FL TL_ENTER_TIME_FLU TL_PAYBTIME_FLU TL_PRE_POP_ELP_FL TL_RPT_TIME_FLU TL_TIME_SUM_FLU

Traverser Configuration Page

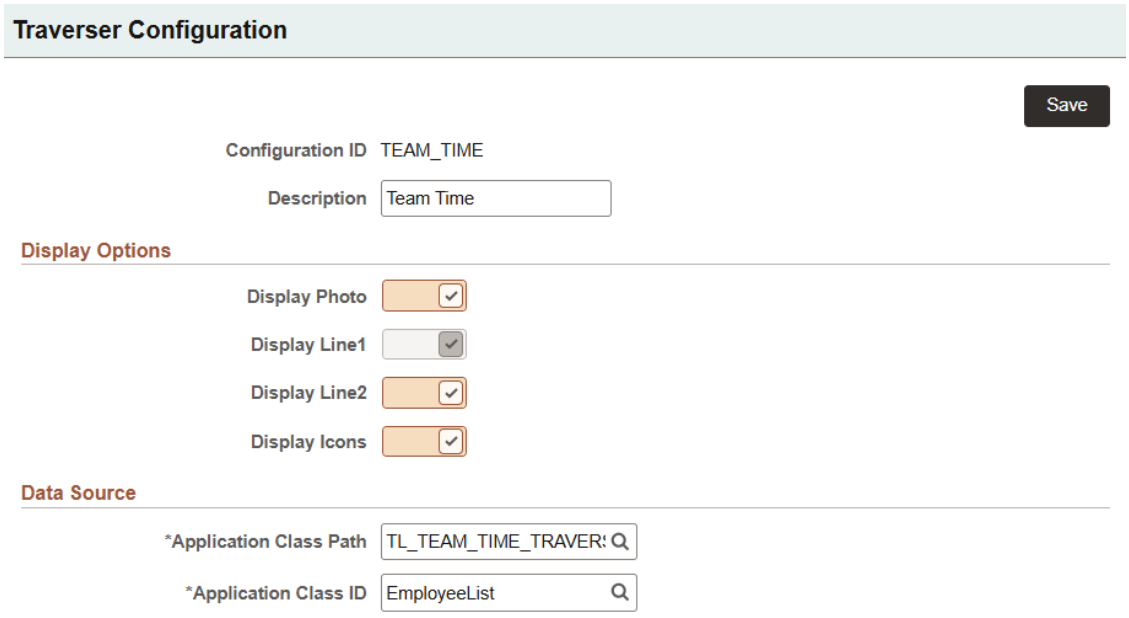
Use the Traverser Configuration page (HCSC_TR_CONF_FLU) to set up card traverser configuration IDs.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Traverser**, and then **Configure Traverser**, and then **Traverser Configuration**

This example illustrates the fields and controls on the Traverser Configuration page.

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Field or Control	Description
Display Photo	Select to display a photo. The photo you use is defined in the data source. If using a photo and one does not exist, such as an employee photo, you can have the card display the first and last initials of the employee's name.
Display Line1	This option is always selected and shows information based on the what is provided by the data source. For example, it can be set to always show the employee's name.
Display Line2	Select this option to display the next line of information as defined in your data source.
Display Icons	Select this option to show icons when actions are needed for something, such as an employee. If no actions are needed, icons will not appear on a card. **Note.** You can display up to three icons per card at a time.

Data Source

Field or Control	Description
Application Class Path	Enter a path that uses the specific class and application package that retrieves the employee data that should appear on the card, like name and job title.
Application Class ID	Select the class ID.

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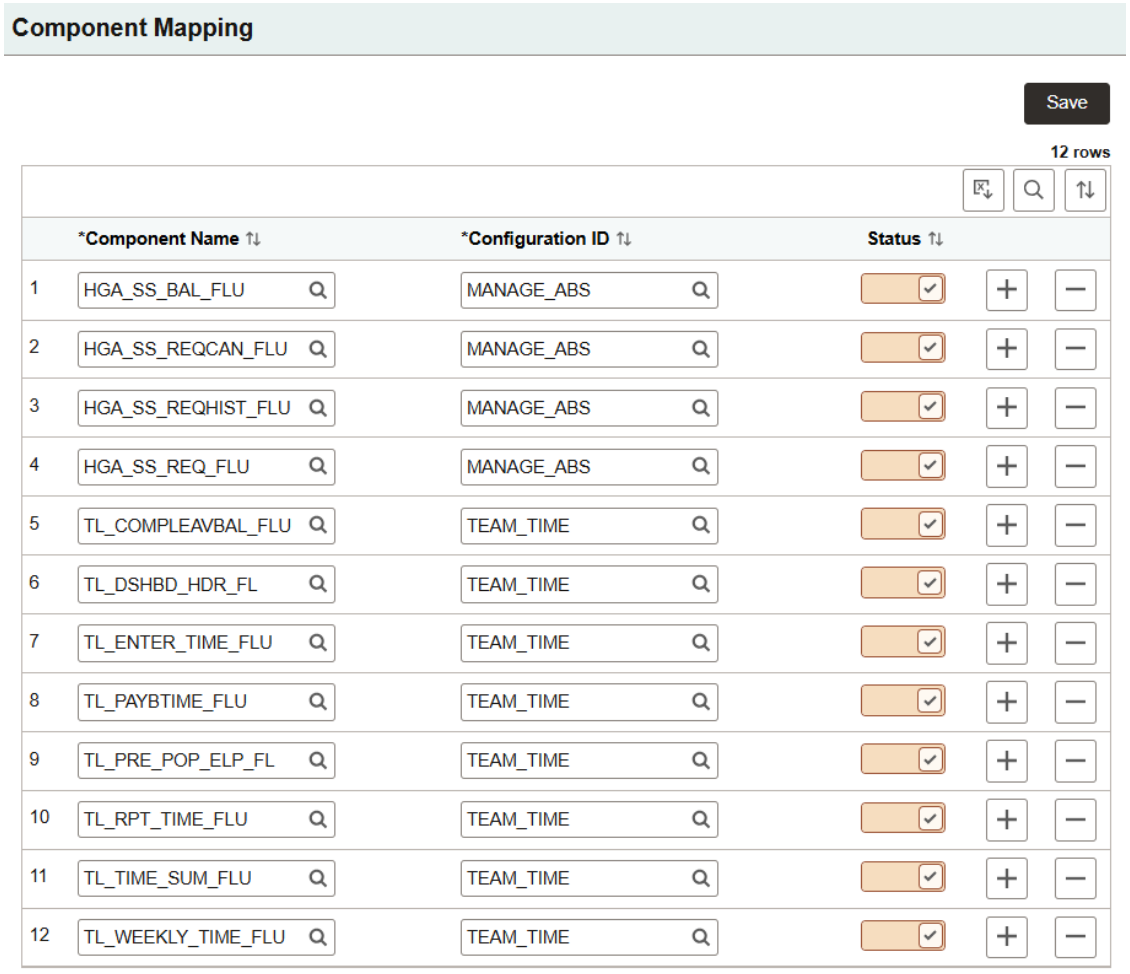
Traverser Component Mapping - Component Mapping Page

Use the Component Mapping page (HCSC_TR_PNLCFG_FLU) to map card traverser IDs to components in the system.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Traverser**, and then **Traverser Component Mapping** , and then **Component Mapping**

This example illustrates the fields and controls on the Traverser Component Mapping - Component Mapping page.



Field or Control	Description
Component Name	Select the component where the traverser carousel should appear. **Note**. Components should have an area for the traverser enabled to add the traverser to the header of a page. PeopleSoft HCM currently delivers and supports the Fluid Absence and Time & Labor components.

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Field or Control	Description
Configuration ID	Select the traverser configuration ID that determines what will be shown on the card. Configuration IDs are defined on the Traverser Configuration Page.
Status	Select to enable the traverser for the component.When deselected, the traverser does not appear on the transactional page.

(Fluid) Managing Employee Headers

PeopleSoft HCM provides you with the flexibility to configure employee header fields for fluid pages.

To manage the employee headers for fluid pages, use the Define Header Fields (HR_EH_FLDNM_TBL), Define Header Configuration (HR_EH_TBL), and Map Header Configuration (HR_EH_COMPONENTS) components.

This topic provides an overview of employee headers in fluid, setting up employee headers, and discusses how to configure employee headers for fluid pages.

These videos demonstrates the configurable fluid header display feature:

Video: Image Highlights, PeopleSoft HCM Update Image 45: Configurable Fluid Header Display

Video: Image Highlights, PeopleSoft HCM Update Image 46: Configurable Header

Video: Image Highlights, PeopleSoft HCM Update Image 49: Configurable Header Enhancements for Self Service

Pages Used to Manage Employee Headers

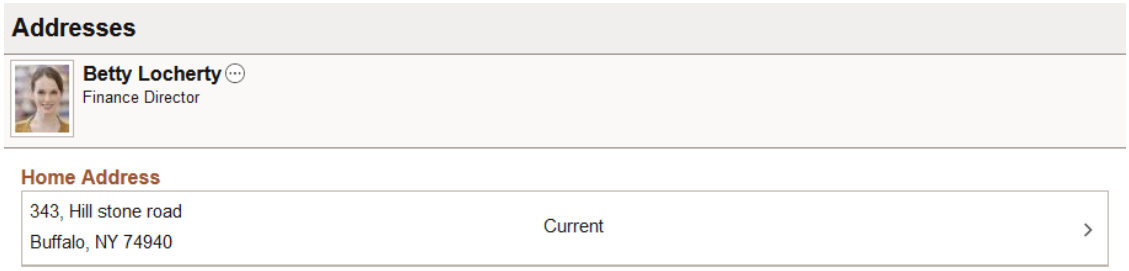
Page Name	Definition Name	Usage
Define Header Fields Page	HR_EH_FLDNM_TBL	Maintain fields that will be available in the header design.
Define Header Configuration Page	HR_EH_TBL	Create header configurations by selecting the fields that should show in the employee header of a page.
Preview Header Page	HR_EH_PREVIEW_SEC	View how the header will display the configured fields.
Map Components Page	HR_EH_COMP_SETUP	Associate header configurations with components to override the default header.
Map ActivityGuide Page	HR_EH_ACTGUI_SETUP	Associate header configurations with activity guide templates.

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Understanding Employee Headers in Fluid

Many of the employee-related fluid pages display a header with the employee's photo, name, job title, and an icon for accessing related actions.

Example of an employee header in fluid



As delivered, the default Employee Photo Header (DEFAULT_HEADER) displays the employee's name and job title details in two rows.

With the Employee Header Configuration feature, you can determine the field data that should appear in fluid headers, showing up to three rows.

> **Note**
>
> This feature is applicable only to the fluid pages that use the *Employee Photo Header* sub-page (HR_EMPL_HDR_SBF). HR_EMPL_HDR_SBF is delivered as part of Employee Photo feature in image 9.
>
> To display additional employee information on the classic pages, see Setting Up Mouse Over Popups.

> **Note**
>
> The employee header configuration does not control the display of the employee photo. The photo in the common header is visible if the **Display Photo** option is enabled on the Installation Table - HCM Options Page, Employee Photo section.

Defining Headers for Activity Guides

You can configure headers in the activity guides to display either in the sub-header or as a popup modal.

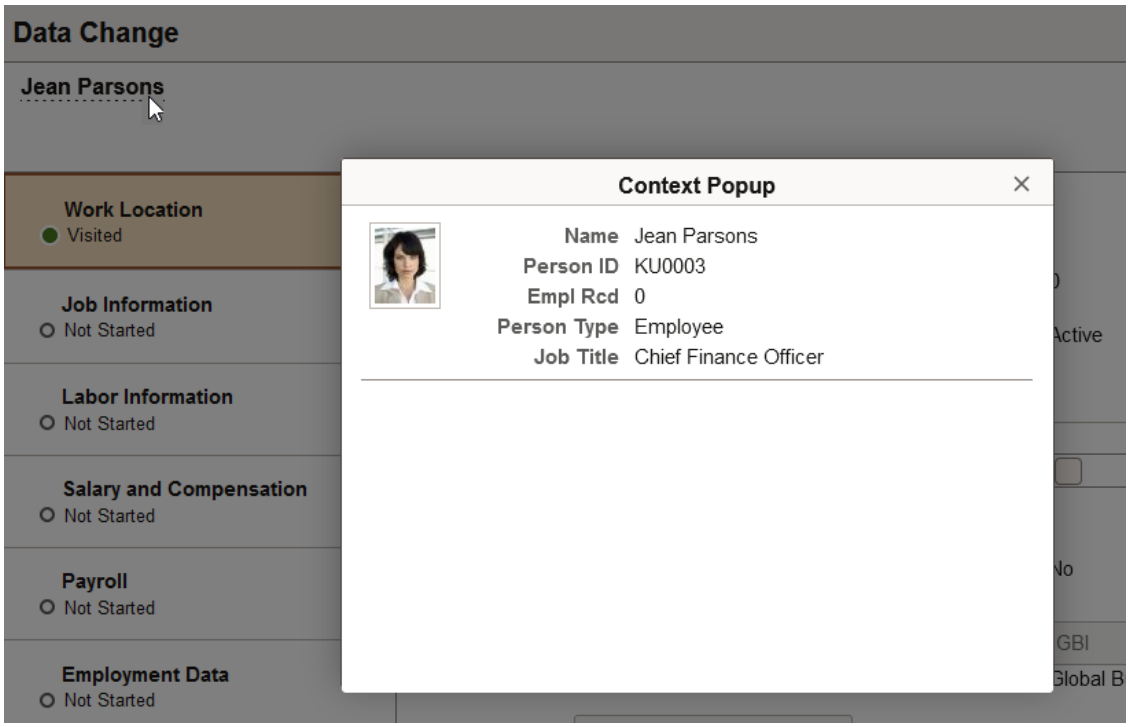
Example of an employee header in an activity guide

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When configured as a popup in activity guide, the user will select the name link to view the details.

Example of an employee header in an activity guide configured as a popup modal



Setting Up Employee Headers

The PeopleSoft HCM application delivers many employee header options but you can also configure many of your own options.

To set up your fluid employee headers:

1. Identify and define the field definitions that should be available for your headers on the Define Header Fields Page.

   Prior to creating your fluid header designs, you must identify the fields that can be included in the header of a component. The PeopleSoft application delivers these predefined fields:

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Field Name	Description
BUSIENSS_TITLE	Business Title
BUSINESS_UNIT	Business Unit
COMPANY	Company
DEPTID	Department
EMAIL	Email
EMPLID	Person ID
EMPL_RCD	Employee Record
EMPL_STATUS	Payroll Status
ESTABID	Establishment ID
FULL_PART_TIME	Full/Part Time Status
GRADE	Grade
HR_STATUS	HR Status
JOBTITLE	Job Title
LOCATION	Location
MANAGER_ID	Manager
NAME	Employee Name
NAME_DISPLAY	Display Name
NAME_FORMAL	Formal Name
PAYGROUP	Pay Group
PER_ORG	Person Type
PHONE	Phone
POSITION_NBR	Position Number
POSITION_TITLE	Position Title
REG_REGION	Regulatory Region
REMOTE_STATUS	Remote Worker Status
SAL_ADMIN_PLAN	Salary Plan
STD_HOURS	Standard Hours
STEP	Salary Step
TIMEZONE	Time Zone **Note:**Employees can enter their time zone using the PeopleSoft Human Resources Administer Workforce: Add Contact or Edit Contact Page in the Company Directory. When the employee has not specified a time zone, the system determines the time using the base time zone from PeopleTools Options.

2. Configure header formats on the Define Header Configuration Page.

   HCM delivers the following header IDs:

Header IDs	Description
DEFAULT_HEADER	Default Header
HRCH_HEADER	Company Directory Fluid Profile Header
JOB_DATA_HEADER	Job Data Header

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Header IDs	Description
ORG_REL_HEADER	Organization Relationship Header
PER_DATA_HEADER	Add/Modify Person Header

3. Map header configurations to your fluid components and activity guides using the Map Header Configuration components (Map Components Page and Map ActivityGuide Page).

Component mappings:

Component Name	Header IDs
HRCD_PROFILE_FL	HRCH_HEADER
HR_JOBDATA_ACT_FL	JOB_DATA_HEADER
HR_JOB_DATA_SUM_FL	JOB_DATA_HEADER
HR_ORGREL_ACT_FL	ORG_REL_HEADER
HR_PERS_ORG_REL_FL	ORG_REL_HEADER
JOB_DATA_ADDSUB_FL	ORG_REL_HEADER
JOB_DATA_ADD_FL	ORG_REL_HEADER
JOB_DATA_SUBMIT_FL	JOB_DATA_HEADER
JOB_DATA_VW_FL	JOB_DATA_HEADER
PERSON_SUB_CNF_FL	PER_DATA_HEADER

Activity guide mappings:

Template	Header IDs
ADDORG1	ORG_REL_HEADER
HRPCWRJ	ORG_REL_HEADER
HRPJORG	ORG_REL_HEADER
HRPPOIJ	ORG_REL_HEADER
JOBDATA	JOB_DATA_HEADER
PERSON2	PER_DATA_HEADER

Define Header Fields Page

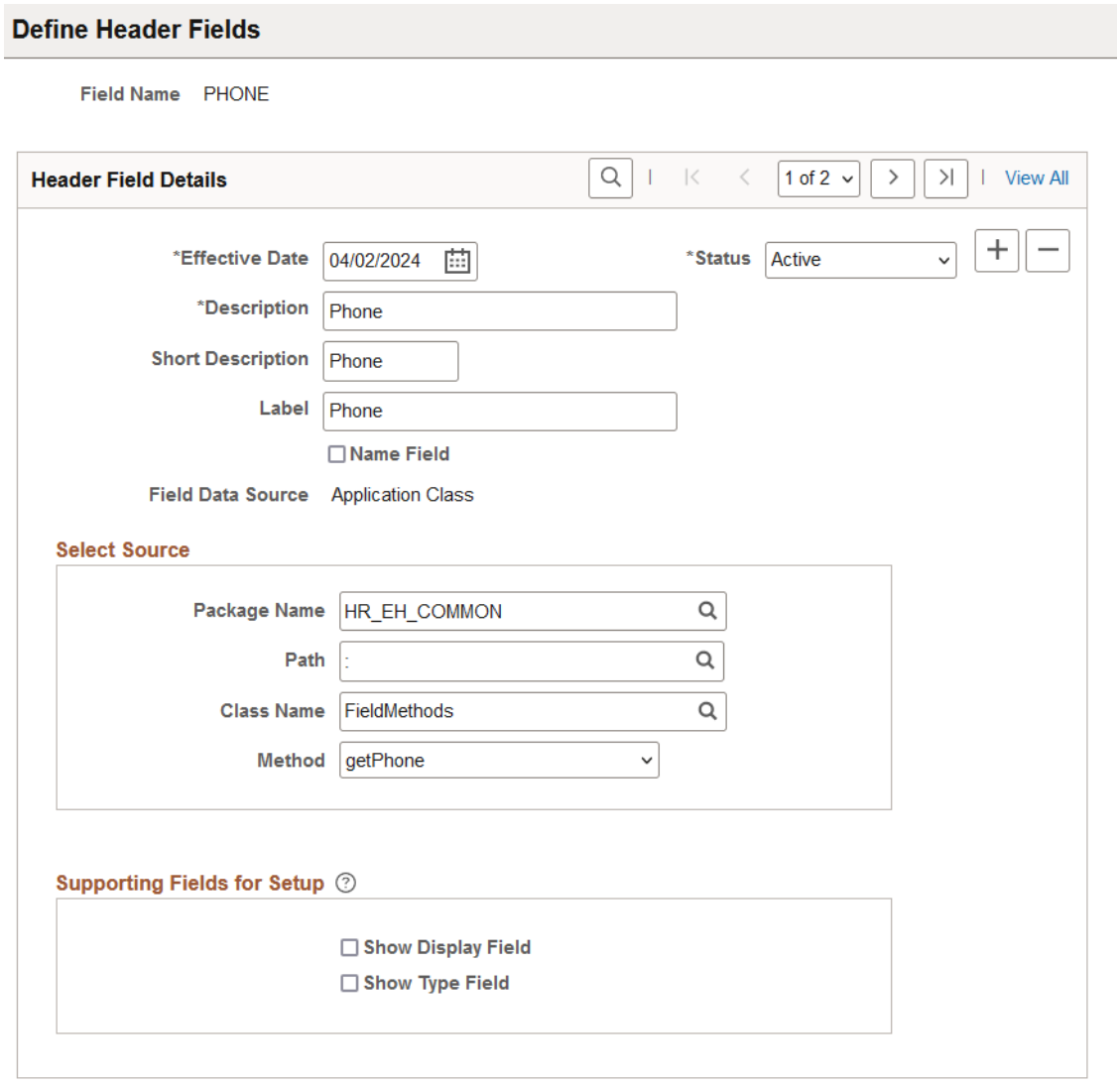
Use the Define Header Fields page (HR_EH_FLDNM_TBL) to maintain fields that will be available in the header design.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Employee Header Configuration**, and then **Define Header Fields**

This example illustrates the fields and controls on the Define Header Fields page.

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The PeopleSoft application delivers several predefined fields for the purpose of designing fluid employee headers. See the Setting Up Employee Headers in this topic.

Field or Control	Description
Description	Enter a description for the field.
Label	Enter a label name that will appear in the **Label** field on the Define Header Configuration Page.
Name Field	Select this check box to activate this field as a prompt option for the name field (**First Row Fields** section, **Field Name**) on the Define Header Configuration Page. The system delivers these name header fields enabled: • *Employee Name* • *Display Name* • *Formal Name*

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Select Source

The source for the fields use an application package. Use this section to identify package details.

Field or Control	Description
Package Name	Enter the ID of the application package that contains the action class to display the header. PeopleSoft HCM delivers the HR_EH_COMMON package for employee headers.
Path	Select the qualified package or path of the application package.
Class Name	Select the class name of the application package.
Method	Select the method within the application class that will be run to display the header.

> **Note**
>
> The Application Class should consider the **Show Display Field** and **Show Type Field** options when configuring.

Supporting Fields for Setup

Field or Control	Description
Show Display Field	Select to show the **Display** field on the Define Header Configuration Page. This field enables the administrator to configure the field to show the code, description, or both.
Show Type Field	Select to show the **Field Type** field on the Define Header Configuration Page. This enables the administrator to configure the field to display the field type. For example, a phone field type may be business, mobile, home, and so forth.

> **Note**
>
> The Application Class should consider the **Show Display Field** and **Show Type Field** options when configured.

Define Header Configuration Page

Use the Define Header Configuration page (HR_EH_TBL) to create header configurations by selecting the fields that should show in the employee header of a page.

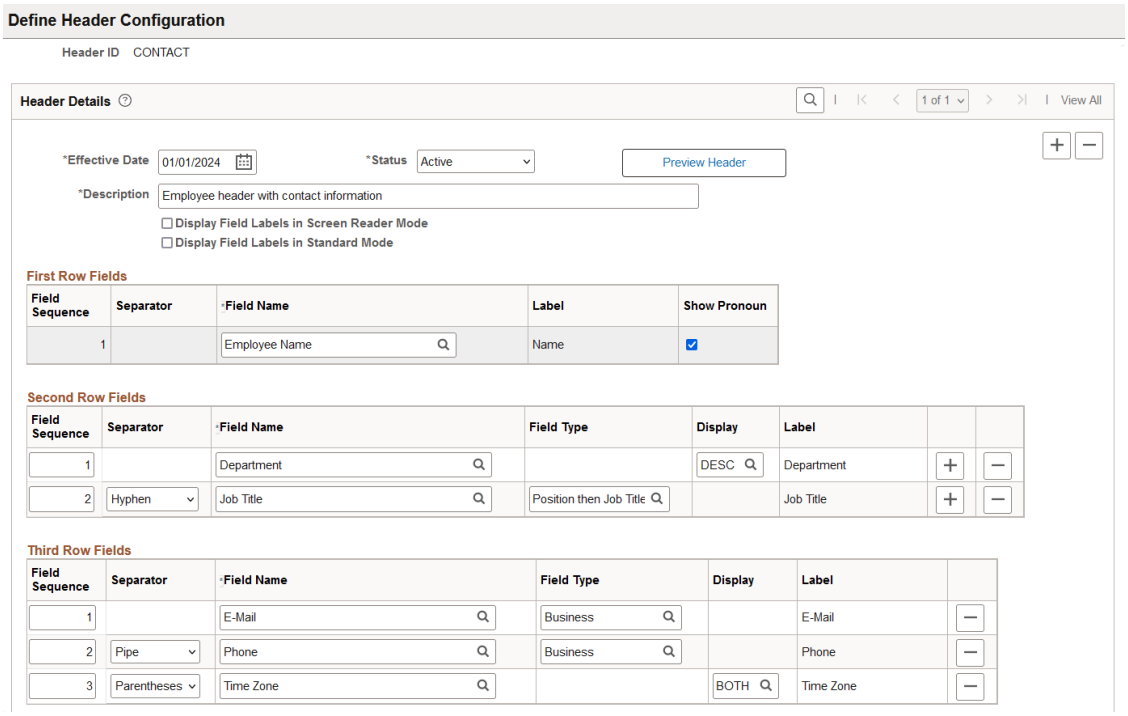
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> **Note**
>
> See the Setting Up Employee Headers, configure header format section to view delivered PeopleSoft HCM headers.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Employee Header Configuration**, and then **Define Header Configuration**

This example illustrates the fields and controls on the Define Header Configuration page.



> **Note**
>
> If you update the delivered DEFAULT_HEADER, it will update the default Employee Photo Header that is used throughout the fluid employee headers.

Header Details

Field or Control	Description
Preview Header button	Select to open the Preview Header Page and view how the fields will appear in the header.

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Field or Control	Description
Display Field Labels in Screen Reader Mode	Select to show configured field values with labels for screen reader users. When selected and in screen reader mode, the header will display all the configured fields as individual fields in a two column format.
Display Field Labels in Standard Mode	Select to show configured field values with labels. When selected, the header will display all the configured fields as individual fields in a two column format.

> **Note**
>
> When the option to display the labels is enabled in the header definition, then the header data will show as a popup in activity guides, where the user will select the employee name link to view the details.

First, Second, and Third Row Fields

You can display up to three (3) rows of data on an employee header.

- **First Row Fields** section will always display the employee's name. You can choose to include a person's pronouns, if enabled.
- **Second Row Fields** and **Third Row Fields** sections can include up to three (3) fields, but the information will appear in a concatenated manner, meaning they will appear in a linear fashion with the separator you define on this page.

Field or Control	Description
Show Pronoun	Select to show a person's pronouns, if enabled and the person has specified them. If not configured, or an employee has not identified pronouns, the header will not display this field. To show a person's pronouns in the header, all of the following must be in place: • **Enable Gender Identity** is selected on the Installation Table - HCM Options Page. • The employee has identified the pronoun on the Personal Details - PeopleSoft eProfile: Gender Details Page in employee self service.
Field Sequence	Indicate the order in which the fields should appear, lowest to highest. For the **First Row Fields** section, you can only have one field row. For the **Second** and **Third Row Fields** sections, you can add up to three (3) concatenated fields for both the second and the third row fields. When the screen reader or standard mode check boxes are selected, the fields will appear as individual fields spanning two columns.

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Field or Control	Description
Separator	Identify how you want to separate the different fields on the row. This separator will appear before this field. Values include: • *Colon* • *Comma* • *Hyphen* • *Parentheses* • *Pipe* • *Semicolon* If a separator value is not selected, then the header will use a space as a default separator.
Field Name and **Label**	For the **First Row Fields** section, select the person's name display from the available options. Valid values come from the Define Header Fields Page where the **Name Field** check box is selected. Delivered options include: • *Employee Name* • *Display Name* • *Formal Name* For more information on name types, see Setting Up Additional Name Information. For the **Second** and **Third Row Fields** sections, enter a field that should appear in the header for the employee. Valid fields and labels are defined on the Define Header Fields Page.
Field Type	This field is available when **Show Type Field** is selected on the Define Header Fields Page for this field. Select the field type that should appear in the employee header. For example, for a phone field, identify whether you want to show the person's business, home, or mobile phone number.
Display	This field is available when **Show Display Field** is selected on the Define Header Fields Page for this field. Select how you want the field value to appear in the employee header. Values include: • *CODE*: shows just the code of the field value. • *DESC*: shows the description of the field value. • *BOTH*: shows both the code and description of the field value.

Preview Header Page

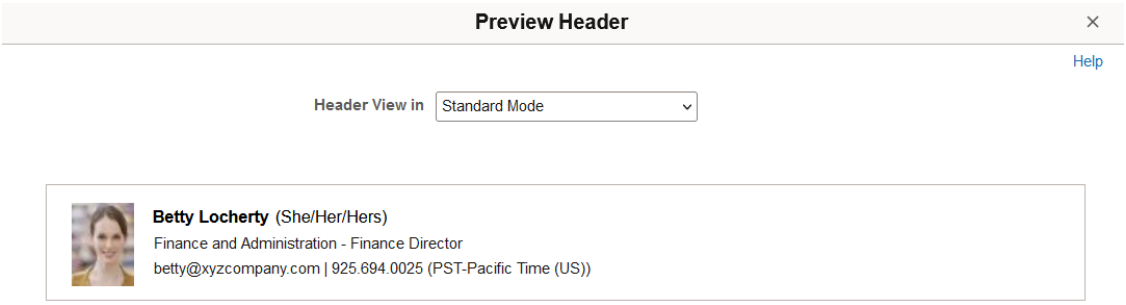
Use the Preview Header page (HR_EH_TBL) to view how the header will display the configured fields.

Navigation:

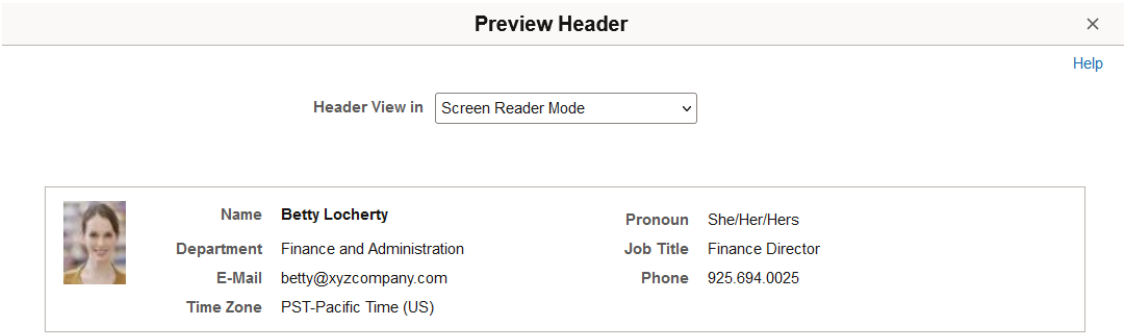
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Click the **Preview Header** button on the Define Header Configuration Page.

This example illustrates the fields and controls on the Preview Header page when the **Display Field Labels in Standard Mode** (or **Screen Reader Mode**) is not selected.



This example illustrates the fields and controls on the Preview Header page when the **Display Field Labels in Screen Reader Mode** (or **Standard Mode**) is selected.



Note

The preview page allows you to see how data is getting displayed. However, the page look may be different on fluid transaction pages.

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Field or Control	Description
Header View in	Select an option to see how the header fields will appear for the following modes: • *Screen Reader Mode* • *Standard Mode* The header format will vary based on the **Display Field Labels in Screen Reader Mode** and **Display Field Labels in Standard Mode** settings on the Define Header Configuration Page. • When deselected, the preview will display up to three rows in a concatenated manner, meaning each row will appear in a linear fashion with the separator you defined. • When selected, the preview will display the configured fields as individual fields in a two column format.

Map Components Page

Use the Map Components page (HR_EH_COMP_SETUP) to associate header configurations with components to override the default header.

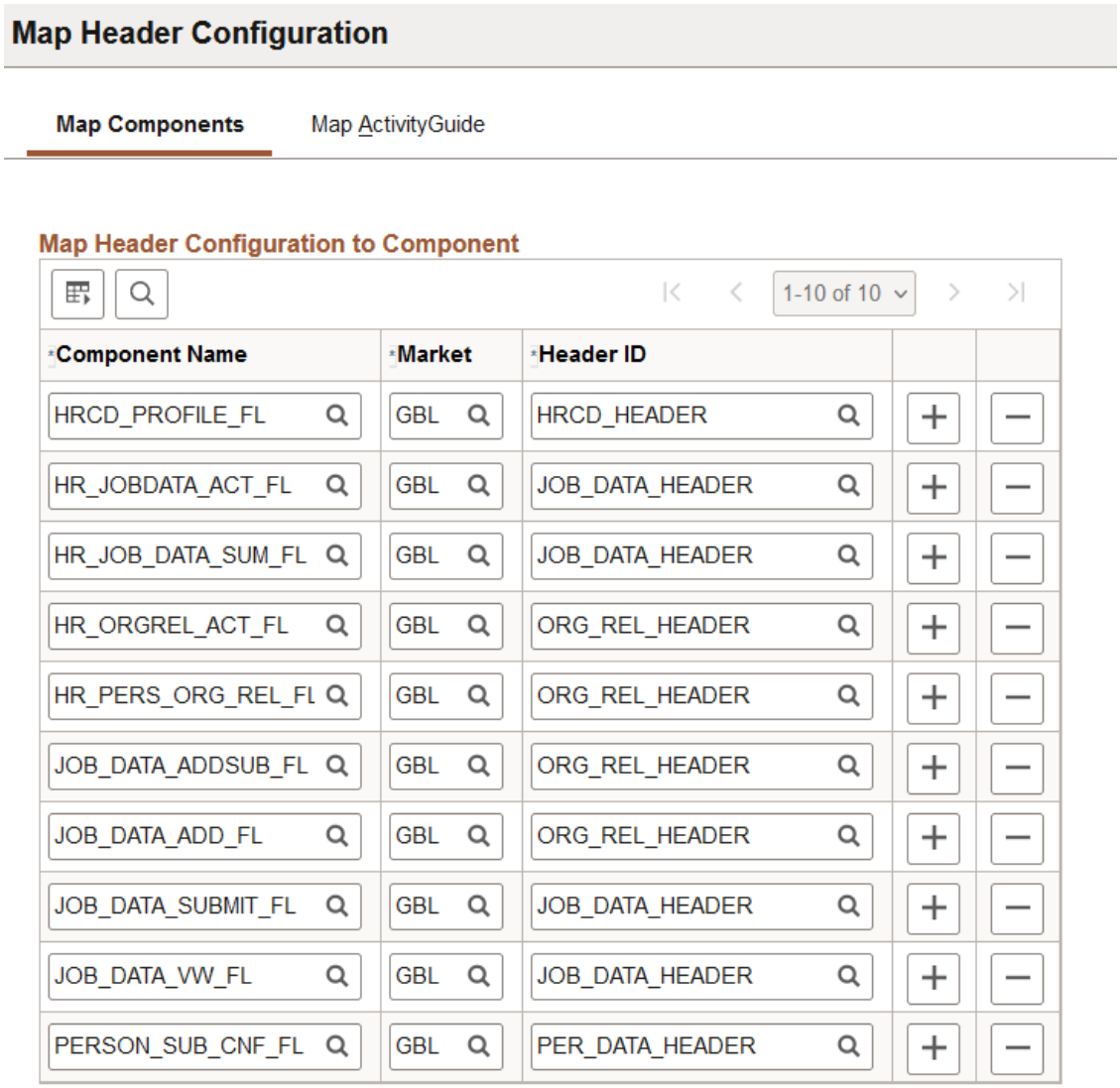
> **Note**
>
> See the Setting Up Employee Headers, map header configurations section to view delivered PeopleSoft HCM component mappings.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Employee Header Configuration**, and then **Map Header Configuration**, and then **Map Components**

This example illustrates the fields and controls on the Map Components page.

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Use this page to associate header IDs to components when you want to display data differently from that provided with the DEFAULT_HEADER.

Important

If a product page uses a customized header instead of the delivered Employee Photo Header, you must remove the customization first in order for this header to render properly within the component.

Field or Control	Description
Component Name	Enter the fluid component that will use this header.
Market	Indicate the market for the component. When different markets exist with the same component name you can differentiate them by market.

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Field or Control	Description
Header ID	Enter the header ID. Valid values come from the Define Header Configuration Page. **Note:** If multiple components will use the same header, you will need to enter a row for each component and associate that header ID.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Person Data Page
- PeopleSoft Human Resources Administer Workforce: Job Data Page
- PeopleSoft Human Resources Administer Workforce: The Activity Guide Composer Framework for the Manage Job Component

Map ActivityGuide Page

Use the Map ActivityGuide page (HR_EH_ACTGUI_SETUP) to associate header configurations with activity guide templates.

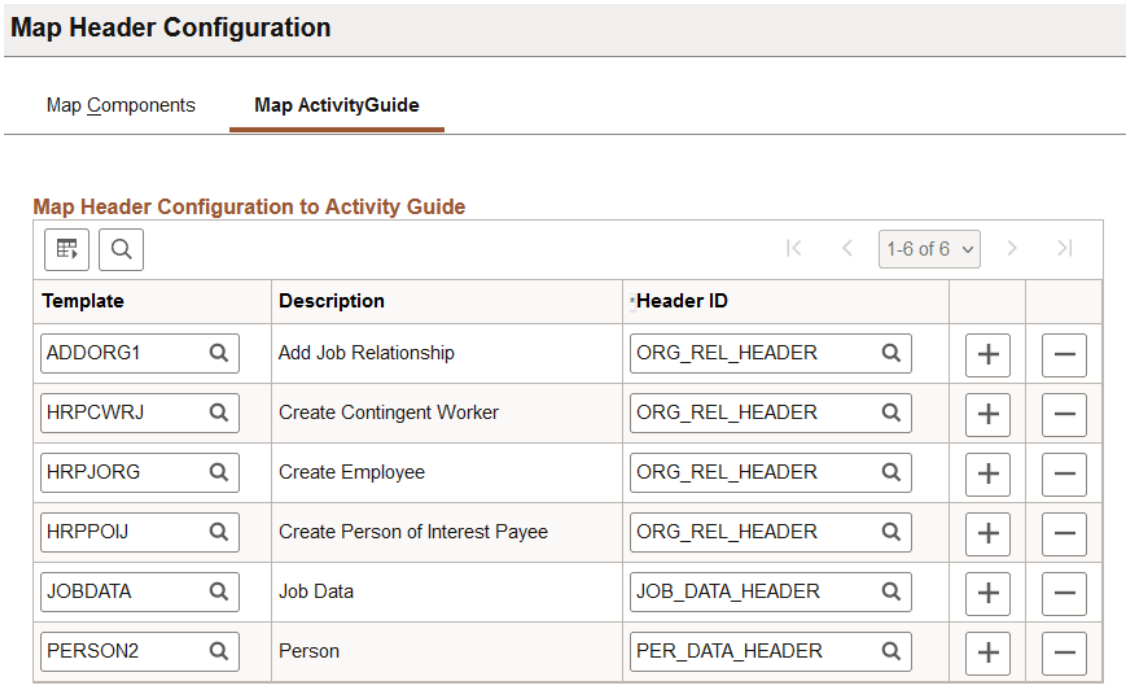
> **Note**
>
> See the Setting Up Employee Headers, map header configurations section to view delivered PeopleSoft HCM activity guide mappings.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Employee Header Configuration**, and then **Map Header Configuration**, and then **Map ActivityGuide**

This example illustrates the fields and controls on the Map ActivityGuide page.

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Important

If a product page uses a customized header instead of the delivered header, you must remove the customization first in order for this header to render properly within the component.

Field or Control	Description
Template	Enter the activity guide template that will use this header.
Header ID	Enter the header ID you created using the Define Header Configuration Page. **Note:** If multiple activity guides will use the same header, you will need to enter a row for each component and associate that header ID.

Related Topics

- Enterprise Components: Managing Activity Guide Templates
- PeopleSoft Human Resources Administer Workforce: Person Data Page
- PeopleSoft Human Resources Administer Workforce: Job Data Page
- PeopleSoft Human Resources Administer Workforce: The Activity Guide Composer Framework for the Manage Job Component

Configuring and Validating Instant Message IDs

These topics provide and overview of instant messaging, instant messaging configuration, and discuss how to validate instant message IDs.

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Pages Used to Test Instant Message IDs

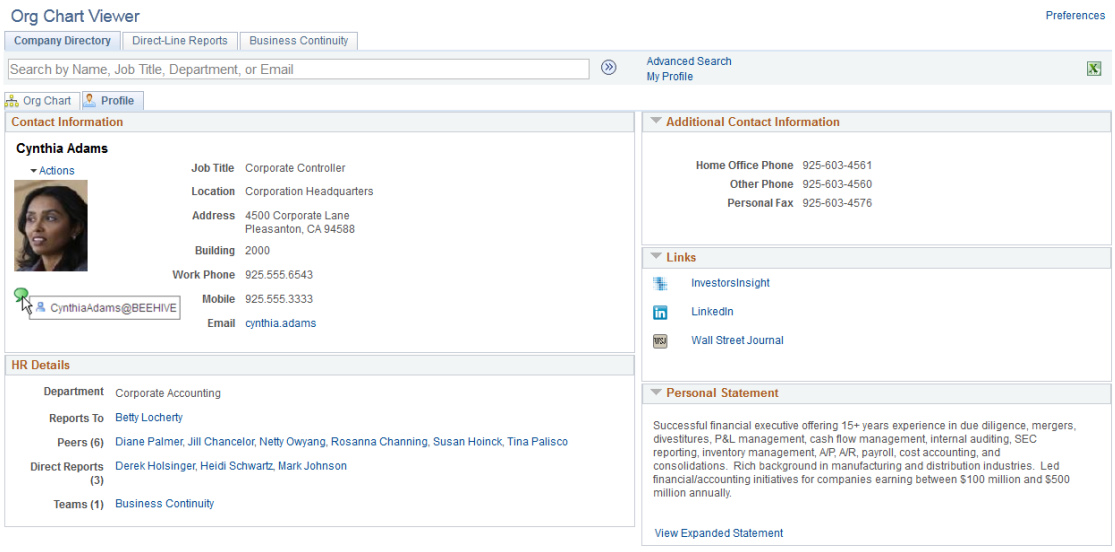
Page Name	Definition Name	Usage
Person Instant Message Tester Page	HR_PERSON_IM_TEST	Test instant message IDs for people

Understanding Instant Messaging

In addition to maintaining contact information for a person's addresses, emails, and phone numbers, the PeopleSoft HCM application supports collaboration within the organization through the use of instant messaging (IM). Instant messaging is a form of real-time direct text-based communication between two or more people using shared clients. Employees can enter instant message IDs through the self-service pages. This information is captured and stored in the HR personal data pages or can be entered directly into HR by the administrator through the Add a Person (or hire process) or the Modify a Person components.

By configuring IM and storing employees' IM data in the system, organizations can enable instant communication from an application page. For example, when viewing another employee's contact details on the Company Directory pages, you can pause over the IM presence icon to view that person's IM information and click to initiate an instant chat with that individual directly from the page.

This example illustrates the fields and controls on the Example of the Org Chart Viewer: Profile page displaying the IM presence icon for an employee. You can find definitions for the fields and controls later on this page.



Understanding Instant Messaging Configuration

Instant messaging uses the PeopleTools MultiChannel Framework to support this functionality.

The PeopleSoft MultiChannel Framework delivers an integrated infrastructure to support instant messaging through public networks. The instant messaging networks, public and private, are implemented for IM single-button presence detection and are configured within the

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Servers Configuration component **(PeopleTools**, and then **MultiChannel Framework**, and then **Instant Messaging**, and then **Presence**, and then **Servers Configuration).**

To display and utilize the IM presence icon on a business process page, you must configure your IM domains in the Server Configuration component.

The MultiChannel Framework supports these IM network protocols for instant messaging:

- GTALK
- MSN
- XMPP
- YAHOO

You use a view of these configuration records when capturing employee chat ID details and storing this information in the PERSON_IMCHAT record associated with the HCM personal data (PERSON Model).

Configuring IM Users for XMPP Servers

In order to obtain user presence information from XMPP-configured IM servers, users must log in to the server. Each user needs to enter his or her user ID and password for the XMPP server. If XMPP login information has been entered for a user profile, the login process to the configured XMPP server happens automatically when the user signs on to PeopleSoft.

Perform this task by navigating to My System Profile or PeopleTools, Security, User Profile, User Profile. Click the Instant Messaging Information link and enter your user ID and password information for each XMPP domain you are using.

See *PeopleTools: PeopleSoft MultiChannel Framework,* “Configuring Instant Messaging in PeopleSoft MultiChannel Framework”

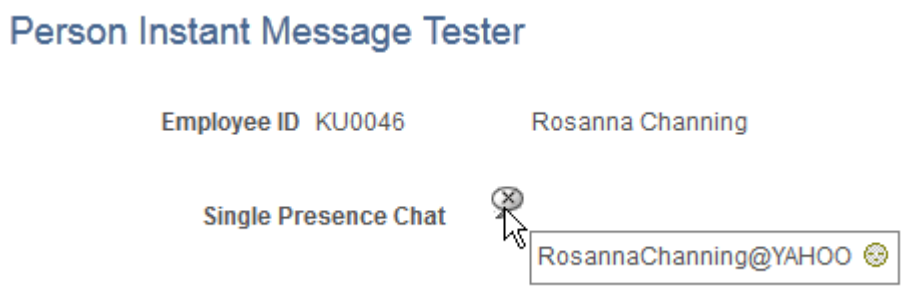
Person Instant Message Tester Page

Use the Person Instant Message Tester page (HR_PERSON_IM_TEST) to test instant message IDs for people.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Person Instant Message Tester**, and then **Person Instant Message Tester**

This example illustrates the fields and controls on the Person Instant Message Tester page. You can find definitions for the fields and controls later on this page.



The **Single Presence Chat** icon will display different IM icons based on the following:

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Field or Control	Description
	Indicates that the employee is available on the IM Protocol specified.
	Indicates that the employee is either not available on the IM protocol specified or the employee does not have an account on that IM protocol.
	Indicates that there is an error connecting to the IM protocol.

Pause over the **Single Presence Chat** icon to view all instant message IDs set up for an employee.

Configuring and Working with the HR Notepad

To configure the HR Notepad, use the HR Notepad Configuration (HR_NP_CONFIG) component.

These topics provide an overview of the HR Notepad and discuss how to configure and work with the HR Notepad.

Pages Used to Configure and Work with the HR Notepad

Page Name	Definition Name	Usage
HR Notepad Configuration - Applications Page	HR_NP_CONFIG_HDR	Configure the HR Notepad for use by an application.
HR Notepad Configuration - Configure Keys Page	HR_NP_CONFIG2	Set up the keys for storing notes.
HR Notepad Configuration - Configure Links Page	HR_NP_CONFIG3	Configure the links that appear on application note pages.
Note Pad Tester Page	HR_NP_TEST_API	Test the notepad configuration.
<application page> Notepad Page	HR_NP_NOTE_SRCH	Access the notepad page to search for and enter notes.
Selected Note Page	HR_NP_NOTE	Enter or update a note.
Confirm Delete Page	HR_NP_MESSAGE	Confirm the deletion of a note.
(Classic) Person Search Page	HR_PSS_SEARCH	Transfer ownership of the selected note to another person.

Understanding the HR Notepad

A notepad is a logical grouping of text-based notes, or a collection of notes that a user has entered within the context of an application. For example, an employee might have a notepad within the context of job data.

You can integrate the plug-in application that maintains the HR Notepad into any HCM application. This application enables the user to record logical notes that are relevant to a row of application data. A common data structure, partitioned by application, is used to store notes.

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The notepad provides a consistent user interface (UI) that enables users to create, edit, view, and delete text-based notes. The Notepad UI is a single component that contains two pages for selecting and maintaining notes, a secondary page for displaying warnings and errors, and a tertiary page for viewing note history. In most cases, you can access the notepad pages when an application page displays the **Maintain/View Notes** icon.

Term	Definition
	The **Maintain/View Notes** icon enables users to access the notepad pages to enter and view notes.

Although the Notepad interface is consistent across all applications, detailed notepad presentation and behavior specific to a given application are defined in a configuration table entry for the application. This entry defines the behavior of the Notepad interface and the keys that are used for the particular application.

> **Important**
>
> The Performance Notes feature is available in Fluid to support the creation and management of standalone notes and notes created for documents in Fluid ePerformance. Fluid Performance Notes has its own setup page and does not use HR Notepad configuration.
>
> For more information about Fluid Performance Notes, refer to the PeopleSoft ePerformance: (Fluid) Working With Performance Notes topic.

HR Notepad Configuration - Applications Page

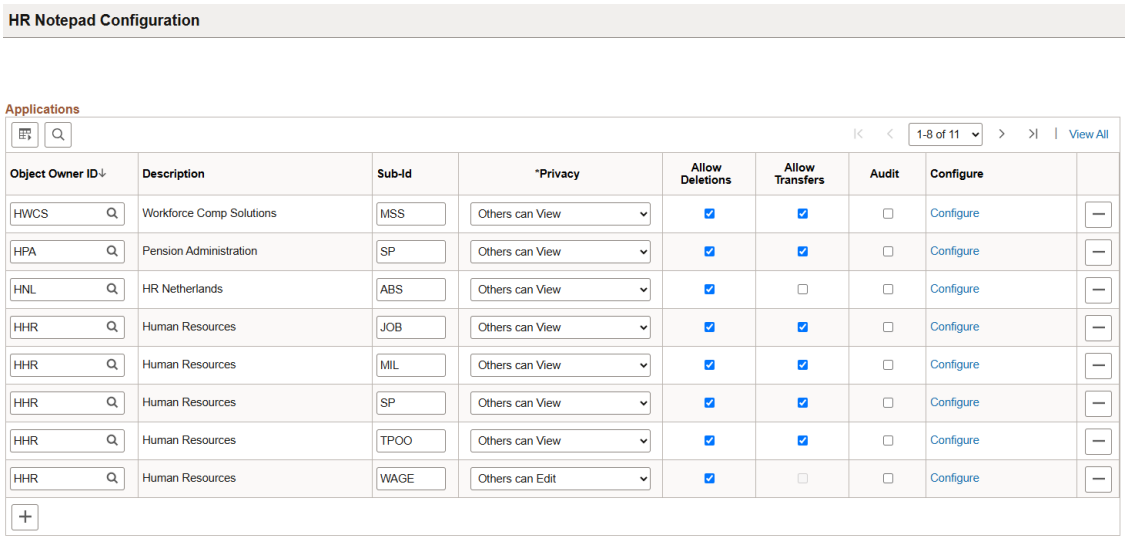
Use the HR Notepad Configuration - Application page (HR_NP_CONFIG_HDR) to configure the HR Notepad for use by an application.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Configure HR Notepad**, and then **HR Notepad Configuration**

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

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Field or Control	Description
Object Owner ID and **Description**	Select an object owner. The system will display the description of the object owner.
Privacy	Select from these options: • *Private:* Only the owner of the note can access the note. • *Others can View:* Anyone can view existing notes in this partition, but only the note owner can update an existing note. • *Others can Edit:* Anyone can view and edit existing notes in this partition.
Allow Deletions	Select to permit users to delete notes.
Allow Transfers	Select to permit users who entered and therefore are the owner of a note to transfer ownership of a note to another individual.
Audit	When selected, this check box enables the Audit Changes feature for the partition. The system will automatically retain a history of all changes made to existing notes, including transfers and deletions.
Configure	Click to access to the Configure Keys page.

HR Notepad Configuration - Configure Keys Page

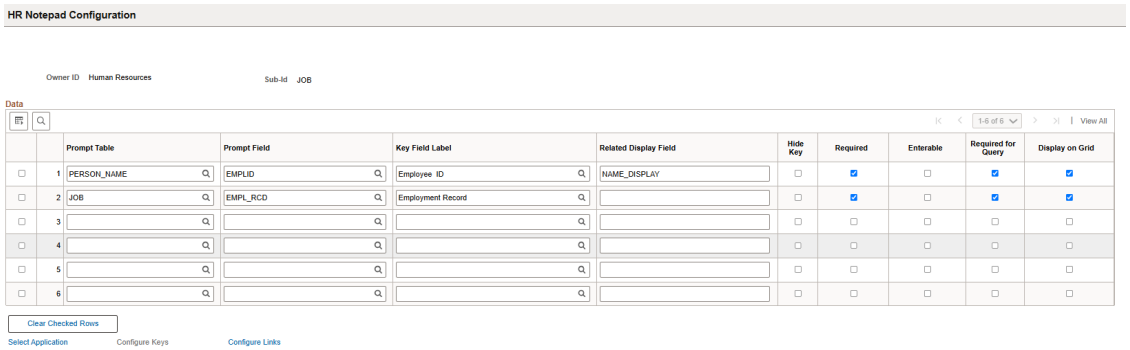
Use the HR Notepad Configuration - Configure Keys page (HR_NP_CONFIG2) to set up the keys for storing notes.

Navigation:

Click the **Configure** link for an application on the HR Notepad Configuration - Select Application page.

This example illustrates the fields and controls on the HR Notepad Configuration - Configure Keys page. You can find definitions for the fields and controls later on this page.

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This page is for note pad key configuration and consists of six context key rows. Each row in the grid supports one key configuration requirement.

Field or Control	Description
Prompt Table	Select the table that is used to provide a prompt list and validate the entry when a user enters a value into the key search field in the UI.
Prompt Field	Select the field within the prompt table that is used to provide the values in the prompt list. You must enter a value in this field if you enter a value in the **Prompt Table** field.
Key Field Label	Select the configurable label that will display on the page for this field.
Related Display Field	Enter the field name for the prompt table that appears in the UI as a related field for the value. This field is optional. If not specified, then there is no related-display field for the context key. For example, you do not usually specify a display field for a date or number context key.
Hide Key	Select to indicate whether this key field is exposed on the UI pages. This field is selected by default.
Required	Select to indicate that this key field is required when adding a note. This field is deselected by default.
Enterable	Select to indicate that the user is permitted to enter a value into this key field in the UI search criteria. This field is selected by default. You might deselect this field in cases which the key is automatically populated by the API and exposed on the UI, but you do not want the user to change it.
Required for Query	Select to indicate that the user must populate the key in the UI search criteria to see the list of notes that meet the search criteria, or to add a new note. This field is deselected by default.
Display on Grid	Select to display the context key value in the list of notes that meet the search criteria. You usually select this check box for any context key that has **Required for Query** deselected.

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Field or Control	Description
Clear Checked Rows	Click this button after you have selected any context key rows for which you want to clear from this configuration. The page will still display the row but the prompt table and field information will be cleared.

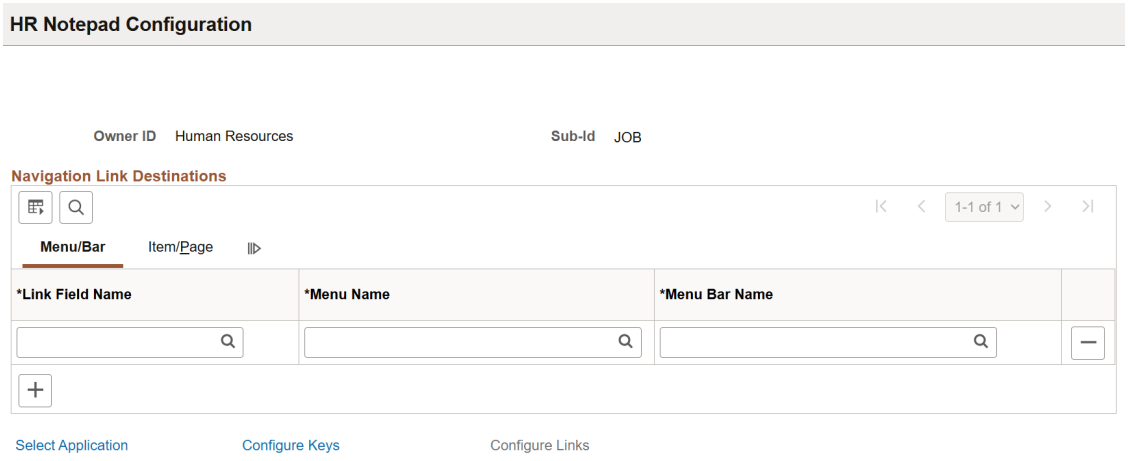
HR Notepad Configuration - Configure Links Page

Use the HR Notepad Configuration - Configure Links page (HR_NP_CONFIG3) to configure the links that appear on application note pages.

Navigation:

Click the **Configure Links** link on the bottom of the HR Notepad Configuration - Configure Keys page.

This example illustrates the fields and controls on the HR Notepad Configuration - Configure Links page: Menu/Bar tab. You can find definitions for the fields and controls later on this page.



Use this page to define the navigation that takes place when the user clicks one of the navigation links at the bottom of the Notepad UI.

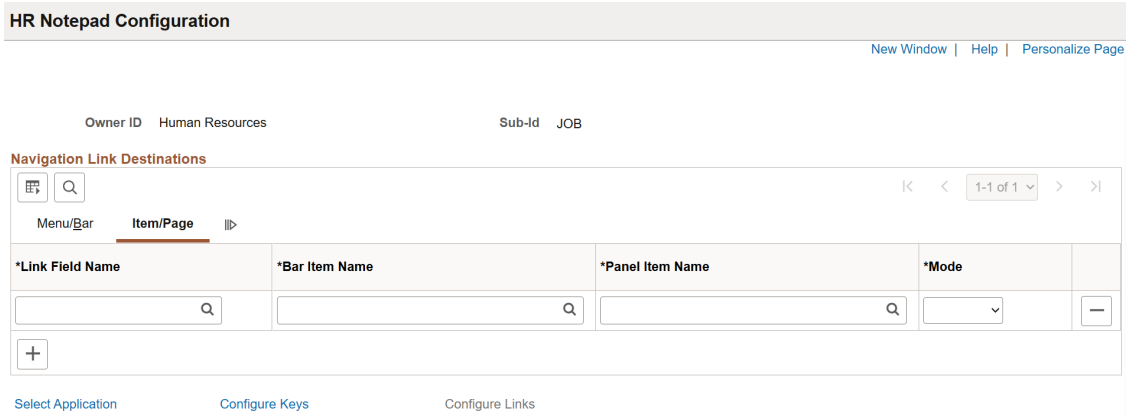
Field or Control	Description
Link Field Name	Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.
Menu Name	Select the name of the menu to which the user is transferred when they click the link. The prompt table for this field is a view of all menus in the database.

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Field or Control	Description
Menu Bar Name	Select the name of the menu bar to which the user is transferred when they click the link. The prompt table for this field is a view of all menu bars for the menu specified in the **Menu Name** field.

Access the Item/Page tab on the HR Notepad Configuration - Configure Links page.

This example illustrates the fields and controls on the HR Notepad Configuration - Configure Links: Item/Page tab. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Link Field Name	Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.
Bar Item Name	Select the name of the menu bar item to which the user is transferred when they click the link. The prompt table for this field is a view of all items for the menu bar specified in the **Bar Name** field.
Panel Item Name	Select the name of the page to which the user is transferred when they click the link. The prompt table for this field is a view of all pages for the bar item specified in the **Bar Item Name** field.
Mode	Select the operation mode for the page from the values *Add*, *Update/Display*, and *Correction*.

Note Pad Tester Page

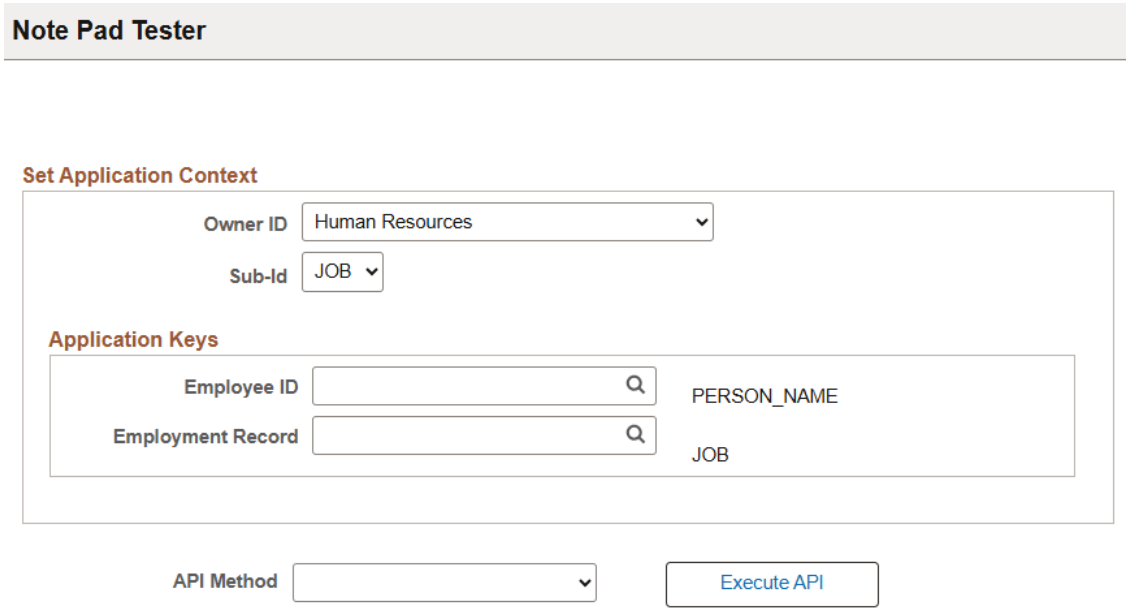
Use the Note Pad Tester page (HR_NP_TEST_API) to test the notepad configuration.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Invoke HR Notepad API**, and then **Note Pad Tester**

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



Use this page to test the Notepad configuration for an application and sub-ID, if applicable.

The application keys that appear on this page are the ones that are defined for the **Object Owner ID** and **Sub-Id.** When you first access this page, only the **Object Owner ID** field is enterable. After you enter the **Object Owner ID,** the **Sub-Id** field is populated with any valid sub ids for the application. The application keys that appear correspond to the application keys (up to six) that you configure on the HR Notepad Configuration - Configure Keys page.

Field or Control	Description
API Method	Select the method to test. • *Add()* • *Edit()* • *InvokeNotepad()* • *View()*
Execute API	Click to run the API method with the keys you entered.

<application page> Notepad Page

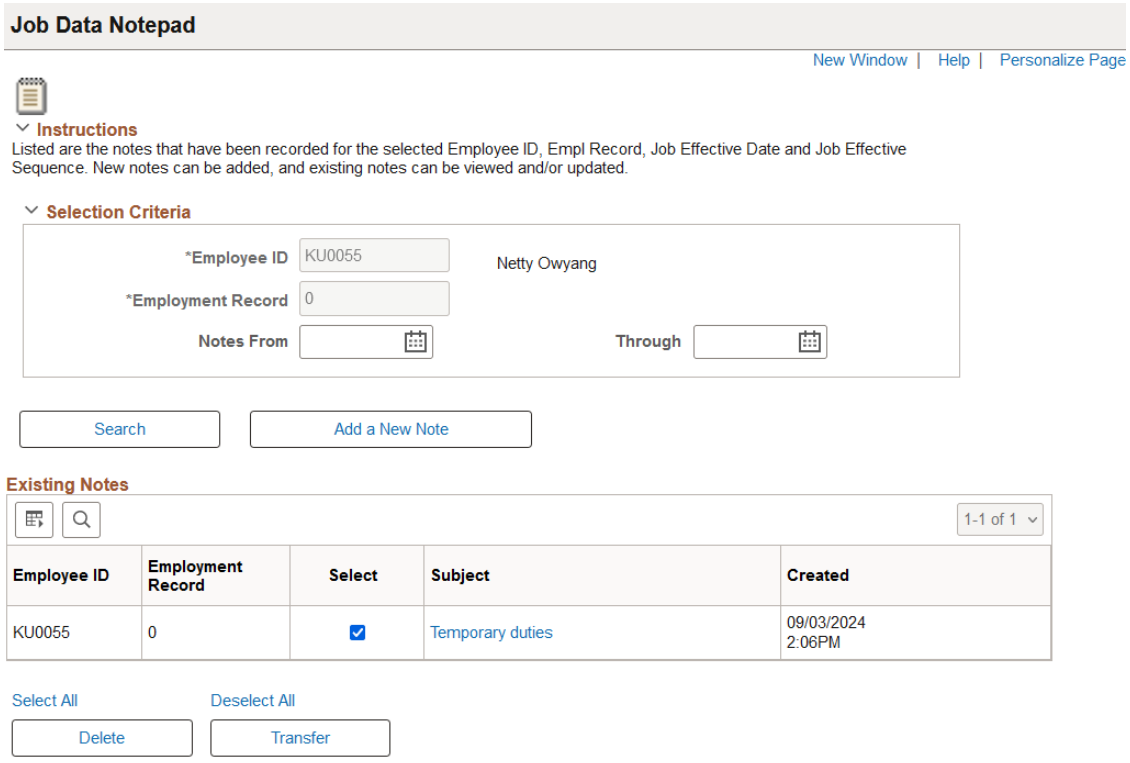
Use the <application page> Notepad page (HR_NP_NOTE_SRCH) to access the notepad page to search for and enter notes.

Navigation:

- Click the **Maintain/View Notes** icon on an application page.
- Click the **Execute API** button on the Note Pad Tester page.

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This example illustrates the fields and controls on the Example of the Notepad page you access through the Job Data pages. You can find definitions for the fields and controls later on this page.



> **Note**
>
> The fields that appear on the notepad page are determined by the notepad configuration.

Selection Criteria

Depending upon the configuration of a page, you may need to select a person to add or view notes. Optionally, enter a **Notes From** and **Through** date.

Field or Control	Description
Search	Select to view a list of notes that meet the search criteria.
Add New Note	Select to access the Selected Note page, where you can create a new note.

Existing Notes

This section displays if there are any notes that meet the search criteria. Select the link in the **Subject** column to open the Selected Note page and view or edit an existing note. If you have ownership of the note, you can make updates to the note. If you do not have ownership (for example, you transferred ownership to another person or someone else entered the note), you cannot edit or delete the note, only view it.

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Field or Control	Description
Delete	Select one or more listed notes to which you have ownership and select this button to remove them from the system.
Transfer	Select one or more listed notes and click this button to access the Person Search - Simple page to transfer the ownership of a note to another individual. When you transfer ownership, although you may have been the creator and you can still view the note, you cannot select to delete or make updates to the note. The person you transferred ownership to now has the edit capabilities for this note. **Note:** If you plan to transfer ownership of a note to another person using the **Transfer** button, consider including the details of the note transfer, such as to whom who you are transferring ownership.

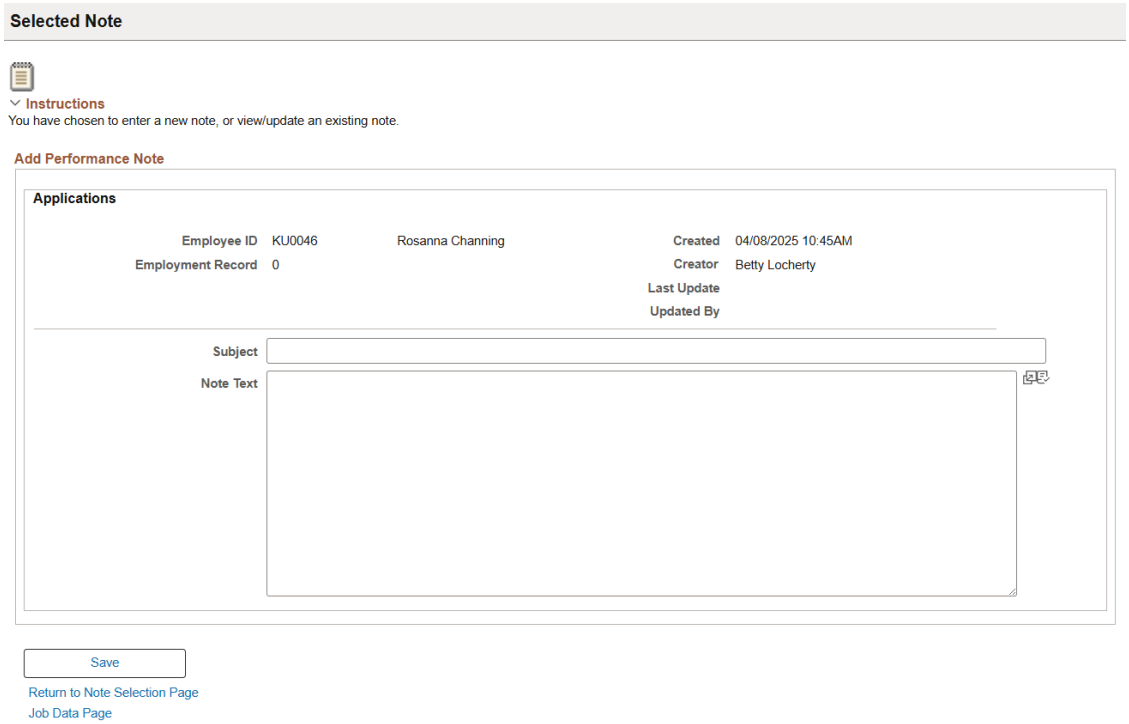
Selected Note Page

Use the Selected Note page (HR_NP_NOTE) to enter or update a note.

Navigation:

Click the **Add a New Note** button or select the **View or Edit this Note** link for an existing note on the <application page> Notepad page.

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



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Field or Control	Description
Effective Date	The note date for new notes is the effective date that appears on the page. You cannot change the date. **Note:** Changing the effective date of the record that is associated with the note does *not* change the note effective date. As a result, the note becomes inaccessible. For example, if you create a note for a job data row with a January 1, 2009 effective date, the note effective date is also January 1, 2009. If you use correction mode to change the effective date of the job data row to January 20, 2009, the note effective date remains unchanged. When you view the notes for the January 20 row of data, you will see only January 20 notes. Without a January 1 row of data, the original note is inaccessible, and users will not see any indication that the original note ever existed.
Subject	Enter the note subject. This entry appears as the link in the Subject column of the notepad page.

Configuring the Text Catalog

To set up the text catalog, use the Configure Text Catalog (HR_SSTEXT_CFG) and Translate Text Catalog (HR_SSTEXT_TEXT) components.

These topics provide an overview of the text catalog, list common elements, and discuss how to configure the Text Catalog.

Pages Used to Work with the Text Catalog

Page Name	Definition Name	Usage
Configure Text Catalog Page	HR_SSTEXT_CFG	Configure the text catalog for an application. Designate keys that are used to store and retrieve text catalog entries.
Maintain Text Catalog Page	HR_SSTEXT_TEXT	Define text catalog entries, and define the values for context-sensitive keys. HTML tags can only be used for text catalogs in the HTML area. It cannot be used anywhere else.
Maintain Text Catalog - HTML View Page	HR_SSTEXT_HTML	View text catalog entries as HTML.
Text Catalog - View All Keys Page	HR_SSTEXT_ALLKEYS	View versions and context-key entries for a particular text ID and effective date combination by clicking the **view keys** link for the desired effective date.

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Page Name	Definition Name	Usage
Translate Text Catalog - Descriptions Page	HR_SSTEXT_LANG	Select and describe the languages into which a text catalog entry is translated.
Translate Text Catalog - Catalog Text Page	HR_SSTEXT_LANG2	Enter translations for text catalog entries.
Test Text Catalog Page	HR_SSTEXT_TEST	Test the text retrieval for a text ID, using any combination of key values.
Text Catalog HTML Tags Page	HR_SSTEXT_TAGS	Maintain HTML tags for use in text catalog entries.

Understanding the Text Catalog

The Text Catalog feature stores standard text that appears on the self-service pages within HCM applications, including field labels, button names, links, page instructions, and warnings. It also includes the text and subject lines of automated email notifications. HCM provides predefined text entries, but you can modify them by using the Text Catalog feature.

Entries in the Text Catalog feature are context-sensitive, meaning that a particular piece of text on a page can vary depending upon the page's usage or context. For example, instructional messages that appear for managers can differ from the messages that appear for workers.

Text Catalog Keys

Context-sensitivity is accomplished through the use of keys that enable the application to retrieve applicable text catalog entries. The keys for each application differ to meet the needs of the application.

Although you can have multiple versions of the same text, you do not have to set up a separate entry for every possible scenario. You can create one generic entry where all key values are blank, and then add entries for the situations that vary from the norm. Blank key values function as wildcards.

> **⚠ Warning**
>
> When the system looks for a match, it stops searching if the search keys narrow the possible choices to a single row—the lower-order search keys are ignored. If you do not set things up correctly, the system may return the wrong results. Plan ahead before making changes, particularly for complex scenarios. Random changes can lead to errors that are difficult to debug later.

You can test changes by using the Test Text Catalog page. To test an entry, enter the text ID that is associated with the text, plus any combination of key values, and click the **Test** button to view the text that the system retrieves for the keys values you entered.

Text IDs

To update a text entry, you need its ID. Use the **Display Text ID** option on the Configure Text Catalog Page to find this information. When you activate this option, the text IDs appear in place of the corresponding text on self-service pages, warnings, and emails.

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To view the correct text IDs, you need to create the conditions that cause the page, warning, or email to appear. For example, you might need to sign in using a particular role.

> **Note**
>
> You may want to activate this option, print a copy of the self-service pages, and then deactivate it. This provides a hardcopy reference of all the text IDs used on each self-service page.

HTML Tags in Text Catalog Entries

PeopleSoft maintains a list of HTML tags that can be used in text entries on the Text Catalog HTML Tags Page.

When saving a text entry on the Maintain Text Catalog Page, the system performs a validation check to make sure that the HTML tags used in the text are maintained on the Text Catalog HTML Tags Page, and displays errors when unidentified tags are found. Unidentified tags cannot be used in text entries; they need to be updated in the text if entered incorrectly, or added to the system if needed.

> **Note**
>
> Use the *HCCPHR9102* permission list to access the Text Catalog HTML Tags page. Users with the *HR Text Catalog Administrator* role can also access the page.

Common Elements Used When Working With the Text Catalog

Field or Control	Description
Text ID	The unique identifier that you entered to access entries in the text catalog.
Usage	The place where the entry is used: *Email Body, Email Subject, Error/Warning, Field Label, Grid/ Scroll Heading, Groupbox Title, Hyperlink/ Button, Page Instructions,* or *Page Title.* The only text entries that you cannot modify are translate values and error messages that appear in Windows error boxes. You can use this field to search the Maintain Text Catalog page when you don't have the text ID, but you do have the specific text.
Effective Date	The date on which a particular text catalog entry becomes active. Delivered text is defined as system data in the PeopleSoft HCM database and has an effective date of January 1, 1900. **Important:** To prevent future updates to PeopleSoft ePerformance from overwriting any text entries that you add or modify, use a later effective date when you add new text entries, and insert a new effective date when you modify delivered text.

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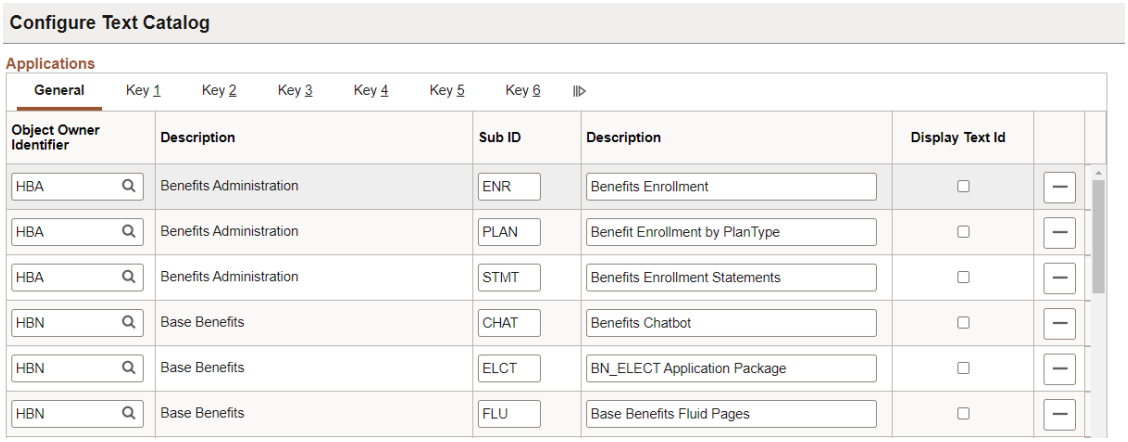
Configure Text Catalog Page

Use the Configure Text Catalog page (HR_SSTEXT_CFG) to configure the text catalog for an application. Designate keys that are used to store and retrieve text catalog entries on the Configure Text Catalog: Key 1 through Configure Text Catalog: Key 6 pages.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Configure Text Catalog**, and then **Configure Text Catalog**

This example illustrates the fields and controls on the Configure Text Catalog page: General tab. You can find definitions for the fields and controls later on this page.



Use this page to add or remove applications from the text catalog and to configure options that affect the operation of the text catalog within an application. The page shot above shows the PeopleSoft HCM applications that are delivered with the text catalog feature enabled.

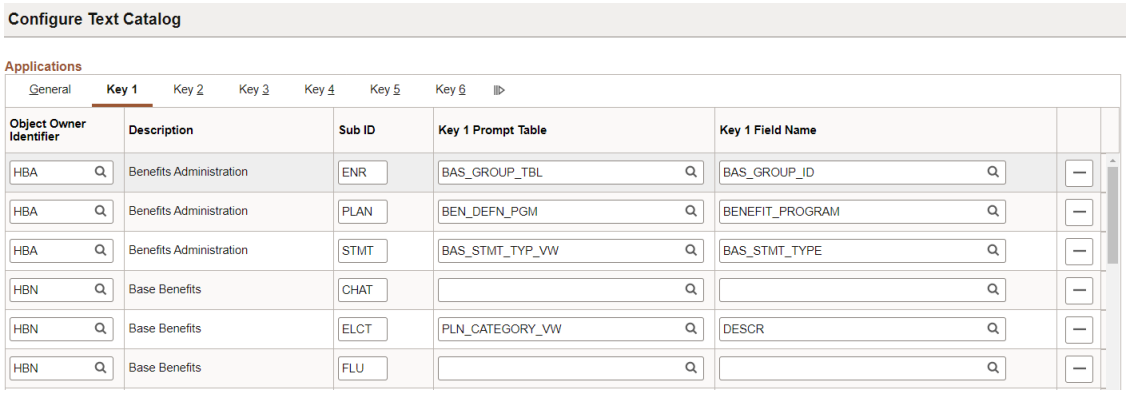
Field or Control	Description
Object Owner Identifier and **Description**	Select an object owner. The system will display the description of the object owner.
Display Text Id	Select to have the system identifiers of the text entry appear instead of the corresponding text. You can use this option to find out which text ID corresponds to a particular piece of text that you want to modify.

Access the Text Catalog page: Key tabs.

> **Note**
>
> The Key 2, Key 3, Key 4, Key 5, and Key 6 tabs are identical in appearance and usage to the Key 1 page (**Set Up HCM**, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Configure Text Catalog**, and then **Configure Text Catalog** and access the appropriate key tab).

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This example illustrates the fields and controls on the Configure Text Catalog page: Key tabs. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Key 1 (2, 3, 4, 5, or 6) Prompt Table	Select the object name of the prompt table that defines the values by which the text catalog is partitioned for an application. The values in this prompt table appear when a text catalog entry is defined and modified. You select the value that pertains to the context in which the entry appears on self-service pages or notifications.
Key 1 (2, 3, 4, 5, or 6) Field Name	Select the field in the prompt table that contains the value that appears in the prompt list for this key.

> **Note**
>
> If you enter a value for the prompt table, you must also enter a value for the field name in the same row.

Maintain Text Catalog Page

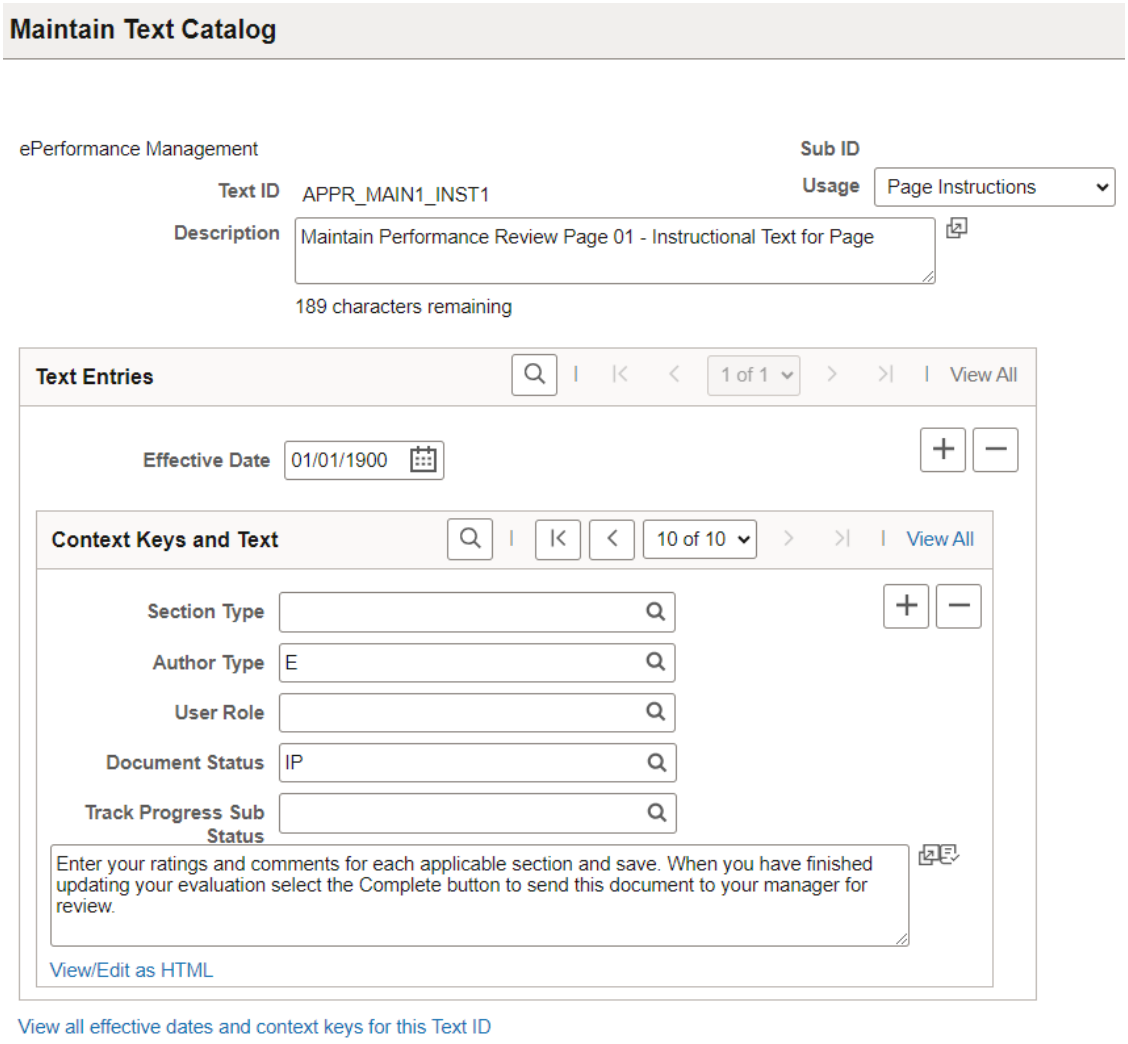
Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to define text catalog entries, and define the values for context-sensitive keys.

Navigation:

- **Set Up HCM**, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Maintain Text Catalog**, and then **Maintain Text Catalog**
- **Set Up HCM**, and then **Product Related**, and then **ePerformance**, and then **Text Catalog**, and then **Maintain Text Catalog**, and then **Maintain Text Catalog**
- **Set Up HCM**, and then **Product Related**, and then **eBenefits**, and then **Maintain Text Catalog**, and then **Maintain Text Catalog**
- **Set Up HCM**, and then **Product Related**, and then **Compensation**, and then **Utilities**, and then **Compensation Alert Text**, and then **Maintain Text Catalog**

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



Context Keys and Text

The context keys that appear on this page are determined by the text catalog configuration for the application, which will display up to six keys. Use the context keys to target the message or text to a particular audience or specify the conditions under which the text is appropriate.

> **Note**
>
> A blank value for any key is a wild card and means that the entry appears in all contexts of the key.

For example, the page shot above shows a configuration of an instructional text for the ePerformance application. The text that is defined in the free-form box applies only to the author type of employees *(E)* and only when the document status is in progress *(IP).*

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For each text ID and effective date combination, define a complete wild card entry in which you leave all key fields blank. This entry, known as the root entry, is the default text entry that's used when no section type, author type, user role, or document status is specified.

Field or Control	Description
View/Edit as HTML	Click to view and edit the HTML tags if the text will appear in an HTML area on the page. See Maintain Text Catalog - HTML View Page. HTML tags can only be used for text catalogs in the HTML area. It cannot be used anywhere else.

Text Substitution

The text strings that are substituted for specific tokens, such as %1 and %2, are different for each application that uses substitution in the text catalog. They are delivered with the application.

Token substitution in the text catalog works in the same way as in the PeopleTools Message Catalog. You supply the values for the tokens in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on performance documents. To use this feature, you must know PeopleCode.

If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the text catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

Text Limits

Although the text catalog framework allows you to enter long text entries, the page element where the text appears at runtime can have a lower character limit, resulting in truncated text. Any time you change a delivered text catalog entry, be sure to test your change. If the entry is truncated, on the runtime page, you must shorten your text.

See *PeopleTools: PeopleCode Developer's Guide*.

Maintain Text Catalog - HTML View Page

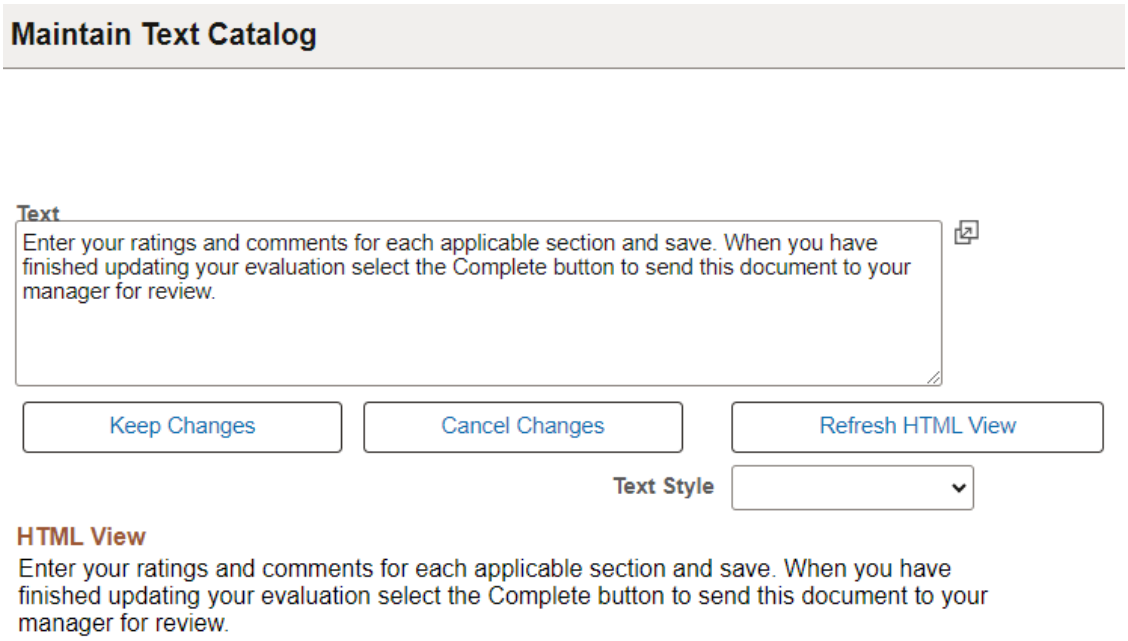
Use the Maintain Text Catalog - HTML View page (HR_SSTEXT_HTML) to view text catalog entries as HTML.

Navigation:

Click the **View/Edit as HTML** link on the Maintain Text Catalog page.

This example illustrates the fields and controls on the Maintain Text Catalog - HTML View page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Text Style	Select the style to apply to the text. After you apply a style (for example, *Bold* or *Error* to a text entry, the **HTML View** page region shows how the text will appear on self-service pages.

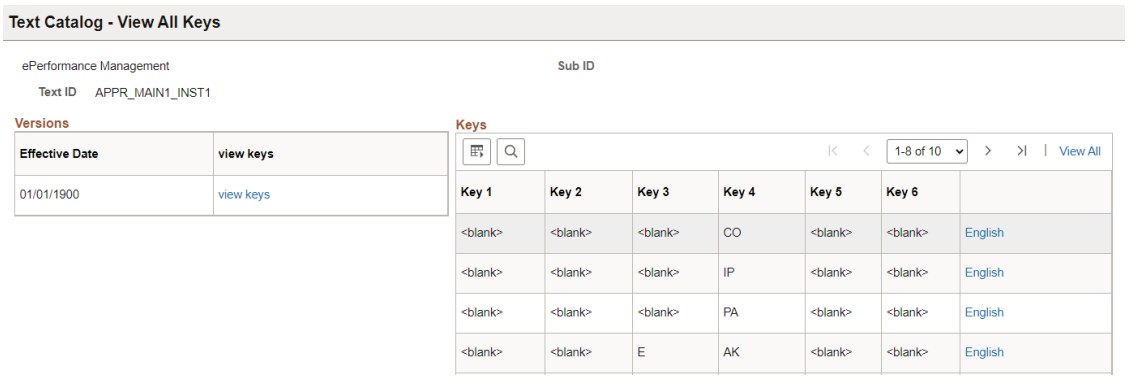
Text Catalog - View All Keys Page

Use the Text Catalog - View All Keys page (HR_SSTEXT_ALLKEYS) to view versions and context-key entries for a particular text ID and effective date combination by clicking the **view keys** link for the desired effective date.

Navigation:

Click the **View all effective dates and context keys for this Text ID** link on the Maintain Text Catalog page or the Test Text Catalog page.

This example illustrates the fields and controls on the Text Catalog - View All Keys page. You can find definitions for the fields and controls later on this page.



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The **Versions** group box lists all effective-dated versions of the selected text ID.

Click the **view keys** link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

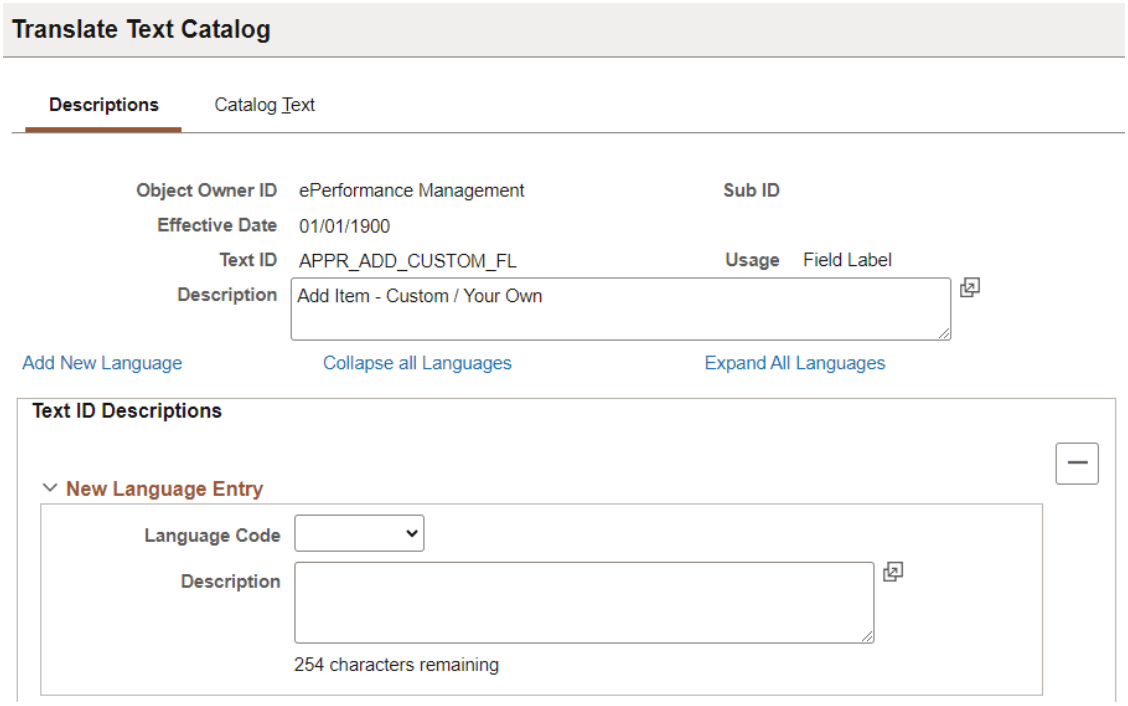
Translate Text Catalog - Descriptions Page

Use the Translate Text Catalog - Descriptions page (HR_SSTEXT_LANG) to select and describe the languages into which a text catalog entry is translated.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Translate Text Catalog**, and then **Descriptions**

This example illustrates the fields and controls on the Translate Text Catalog - Descriptions page. You can find definitions for the fields and controls later on this page.



Use this page to view a text catalog entry and the languages into which it is translated. The **Collapse all Languages** and **Expand All Languages** enable you to control the way the list of languages appears. You can add and remove languages on this page, but you cannot enter translation text.

Translate Text Catalog - Catalog Text Page

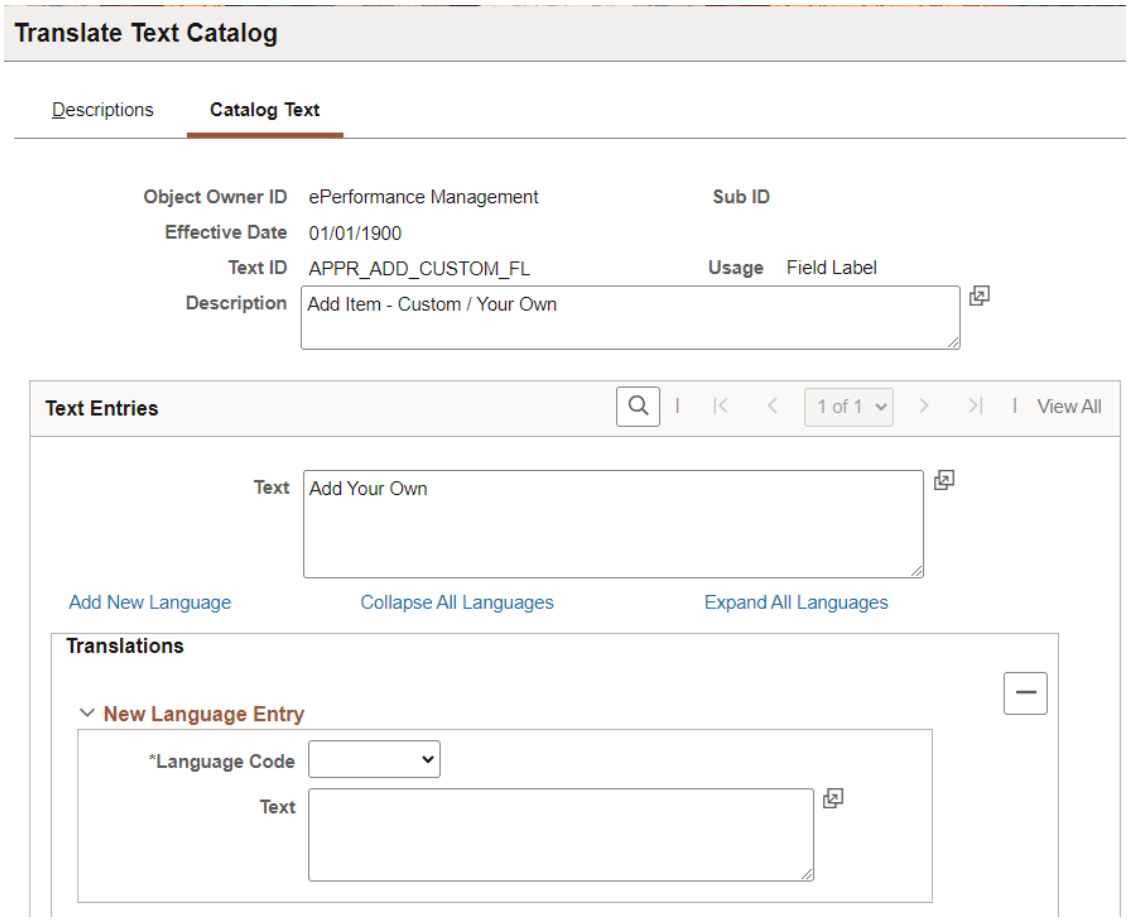
Use this page to Translate Text Catalog - Catalog Text page (HR_SSTEXT_LANG2) to enter translations for text catalog entries.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Translate Text Catalog**, and then **Catalog Text**

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This example illustrates the fields and controls on the Translate Text Catalog - Catalog Text page. You can find definitions for the fields and controls later on this page.



The **Collapse all Languages** and **Expand All Languages** enable you to control the way the list of languages and translation entries appears. You can add and remove languages on this page and view the text you are translating.

Test Text Catalog Page

Use the Test Text Catalog page (HR_SSTEXT_TEST) to test the text retrieval for a text ID, using any combination of key values.

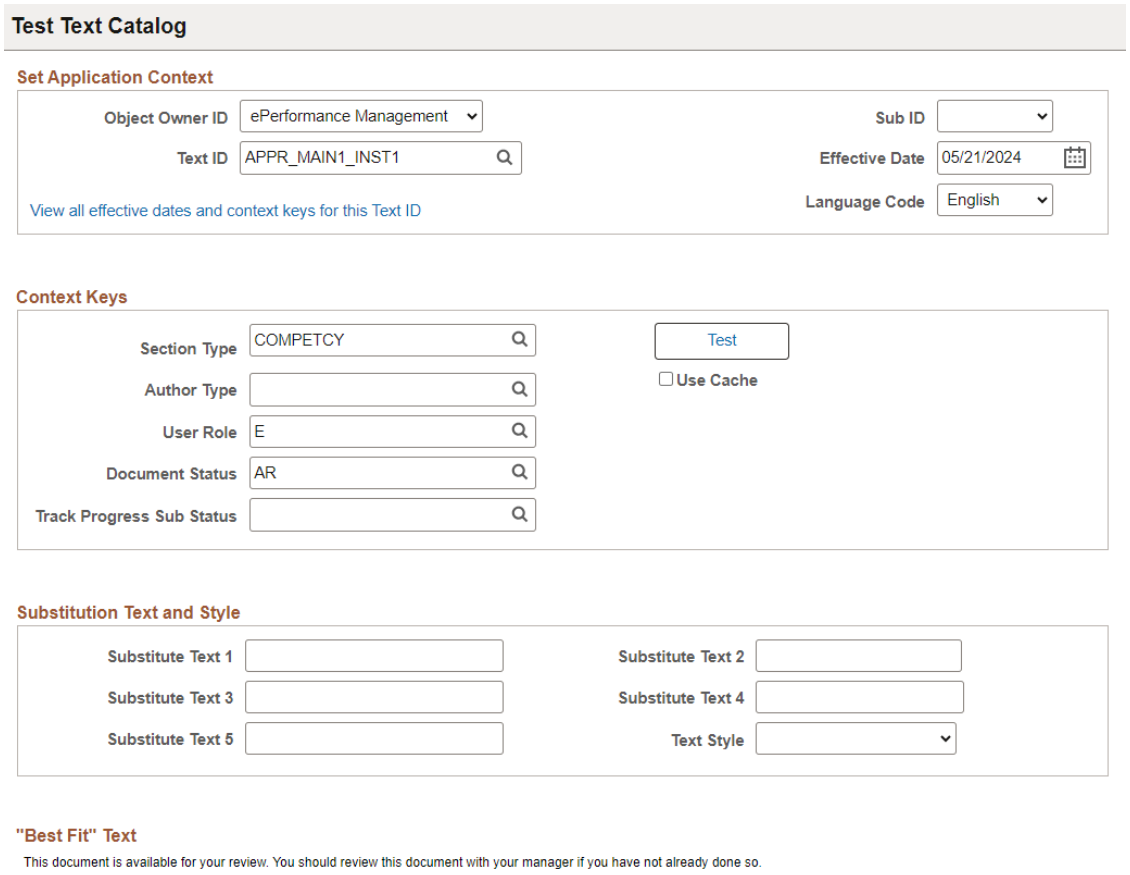
Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Invoke Text Catalog API**, and then **Test Text Catalog**

Set Up HCM, and then **Product Related**, and then **ePerformance**, and then **Text Catalog**, and then **Test Text Catalog**, and then **Test Text Catalog**

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

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This page enables you to enter parameters for testing how the entries in the text catalog appear on self-service pages, given a set of parameters that you enter.

To test the text retrieval:

1. Enter the text ID for the text.
2. (Optional) Enter values for any key fields. The content keys that appear correspond to the application keys (up to six) that you configure on the HR Notepad Configuration - Configure Keys page.
    - If you leave all key fields blank, the system returns the root text when you click the **Test** button.
    - If you enter values for key fields, the system searches for the text with the best fit.
3. (Optional) Enter values in one or more of the Substitution Text fields.

    When you click the **Test** button, the system replaces the variable (%1, %2, %3, %4, and %5) in the text entry with the value that you enter here.
4. (Optional) Select a text style to see the returned text rendered in a particular HTML style.

    This features helps you visualize how the text appears on the self-service page. Values are *PAADDITIONALINSTRUCTIONS* (additional instructions), *PABOLDTEXT* (bold text), *PAERRORTEXT* (error text), *PAPAGEINSTRUCTIONS* (page instructions), and *PAPAGETITLE* (page title format).
5. Click the **Test** button.

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The text entry that best matches the search criteria and context keys for the selected text ID appears.

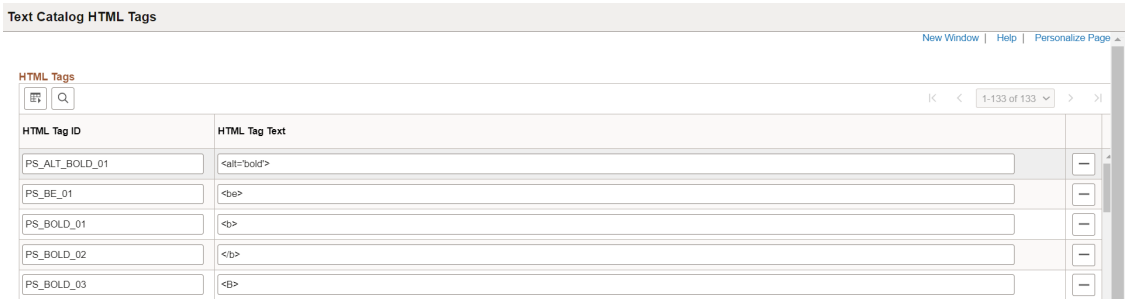
Text Catalog HTML Tags Page

Use the Text Catalog HTML Tags page (HR_SSTEXT_TAGS) to maintain HTML tags for use in text catalog entries.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Text Catalog HTML Tags**, and then **Text Catalog HTML Tags**

This example illustrates the fields and controls on the Text Catalog HTML Tags page. You can find definitions for the fields and controls later on this page.



All HTML tags that are used in text catalog entries must be specified on this page. For security purposes, HTML tags need to be assessed for XSS vulnerability before they are added.

For more information, refer to the *HTML Tags in Text Catalog Entries* section in this topic.

Configuring and Working With Attachments

To configure attachments, use the Define Authorization (HR_ATT_AUTH), Define Authorization Entries (HR_ATT_AUTH_ENT), Define Attachments (HR_ATT_CNFG), Configure Keys (HR_ATT_KEYS_DFN), and Maintain Definitions (HR_ATT_DEFN) components.

An employee can upload documents to PeopleSoft components using the HR Attachment Framework and based on the type of documents being processed, the system displays the list of documents to be uploaded.

This video demonstrates attachment restriction functionality:

Video: Image Highlights, PeopleSoft HCM Update Image 52: Restrict Number of Attachments in the HCM Attachments Framework

These topics provide an overview of attachments and discuss how to configure and work with attachments.

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Pages Used to Configure and Work with Attachments

Page Name	Definition Name	Usage
Define Authorization Page	HR_ATT_AUTH	Enter and maintain attachment authorization IDs which specify the level of user access for attachments.
Define Authorization Entries Page	HR_ATT_AUTH_ENT	Associate attachment authorizations with user roles.
Define Attachments Page	HR_ATT_CNFG	Associate attachments and their authorizations and create links on the page displayed in the target application.
Configure Keys Page	HR_ATT_KEYS_HDR	Define the prompt tables and key fields used by an application.
Attachments Context Keys Page	HR_ATT_KEYS_C	Enter content key prompt values.
Attachments Store Keys Page	HR_ATT_KEYS_S	Enter store key values.
Maintain Definitions Page	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.
Document Upload Page or Attachments Page (Page name will vary based on the transaction you are performing)	(Varies based on the page you are accessing.)	Use this page to initiate the process to upload attachments, add notes, and enter links.
File Attachments and Attachment Pages Note Pages Link Pages	HR_ATTACH_FL_SCF	Add attachments, notes, or links to a transaction.

Understanding Attachments

The attachment feature enables you to attach files, notes, and URLs to a PeopleSoft application. An administrator can add URLs, common notes, and files to a component or page and enable others to view, download and edit the attachments. Attachments include notes, PDF files, spreadsheet files, document files, URLs, and so on. You can also define the types of attachments that users can add to a specific row of application data, such as medical or adoption certificates, fitness for duty forms, and so on.

Although the types of attachments you can add to a page are essentially unlimited, attachments are categorized as one of the following:

- Attachments are any previously created electronic file that the administrator wants users to be able to download.
- URLs are links to dynamic files or web sites.

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- Notes are free-form text that the user can enter through the attachment page in the PeopleSoft application.

> **Note**
>
> The Define Attachments page enables an administrator to create document definitions, as well as attachments and URLs. Document definitions are types of files that users can upload to the system. For example various medical certificates or evidence of class completion.

Since many uploaded attachments should not be visible to all users, the system enables an administrator to restrict access to the attachments. The administrator uses roles to define who can add, modify or delete their own attachments for a specific row of application data.

Setting Up Attachments for Applications Process Flow

Here are the steps for defining attachments to use in PeopleSoft applications:

1. Define attachment Authorization IDs using the Define Authorization Page.

   Specify the authorization level access required to edit or view attachments.

2. Define Authorization Entry IDs on the Define Authorization Entries Page.

   For each attachment you plan to establish, specify the attachment object type, Attachment, Note, or URL, and the user roles that can access the attachment. Specify the access level of each user role by assigning an Authorization ID to the role.

3. Define attachment configuration IDs using the Define Attachments Page.

   Add common attachments, URLs, or document definitions and the roles that can see the attachments.

   > **Note**
   >
   > Only attachments and URLS are defined on the Define Attachments page. Notes are created by the user through the attachment pages of the PeopleSoft application.

4. Define Configure Keys using the Configure Keys Page.

   Integrate attachments into any application within any context. After defining the attachments, you can integrate them into any PeopleSoft application and the context varies depending on the product that uses the framework. This page enables you to define which application data field maps to each of the required context keys.

   > **Note**
   >
   > The Fluid Attachment Framework handles add/ update for only Key fields and fields of common Sub Record (HR_ATT_DD_SBR) in the Store record. Any additional non key fields of the store record need to be handled by application's own custom logic.

   a. Configure context keys using the Attachments Context Keys Page.

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Context keys are populated with values corresponding to a field in the associated application. To define the contextual variations, define contextual key prompt tables or views and key prompt fields based on the application using the attachment framework. These keys can come from any number of tables and are implemented as generic character fields that are defined as record keys in the data structure at the application level to denote alternate configuration IDs that can be used under different circumstances.

b. Configure store keys using the Attachments Store Keys Page.

For attachment configuration IDs that are document definitions, you must create a store record to launch the document definition and store the attachments added by a user to a specific row of application data.

Define store keys for document definitions in order to differentiate the row of data to which the attachment belongs. Each application can decide the number of keys to use, from 1 to N, creating its own record plus a sub record in Application Designer to store common fields related to the attachments. Once the store record has been created, it must be associated to the Object Owner ID and Sub ID to automatically retrieve the key field definitions and select the store key labels.

After creating the store record, associate it to the Object Owner ID and Attachment Sub ID and then select the field labels. When you enter the name of the store record definition, the key fields are automatically retrieved in the correct order by the key position defined in the record.

5. Maintain definitions using the Maintain Definitions Page.

The system retrieves a list of valid Configuration IDs based on the defined context keys. In addition, the system uses the Definition ID and the effective date to choose the attachment from the database.

6. Implement the attachment framework (see Implementing the Attachment Framework).

To implement the attachment framework use the application class methods in the HR_ATTACHMENTS application package PeopleSoft delivers. There are two classes in the delivered application package. The Attachment_Data application class enables you to create an object containing entries for all of the link labels, configuration IDs and group boxes that contain the links to the defined attachments. The Attachment_UI application class enables you to manage the user interface for the attachments.

See *PeopleTools: PeopleCode Developer's Guide* and *PeopleTools: PeopleCode API Reference*.

Uploading Attachment Documents, Add Notes, and Insert Links

An employee can upload documents to PeopleSoft components using the HR Attachment Framework and based on the type of documents being processed, the system displays the list of documents to be uploaded.

Define Authorization Page

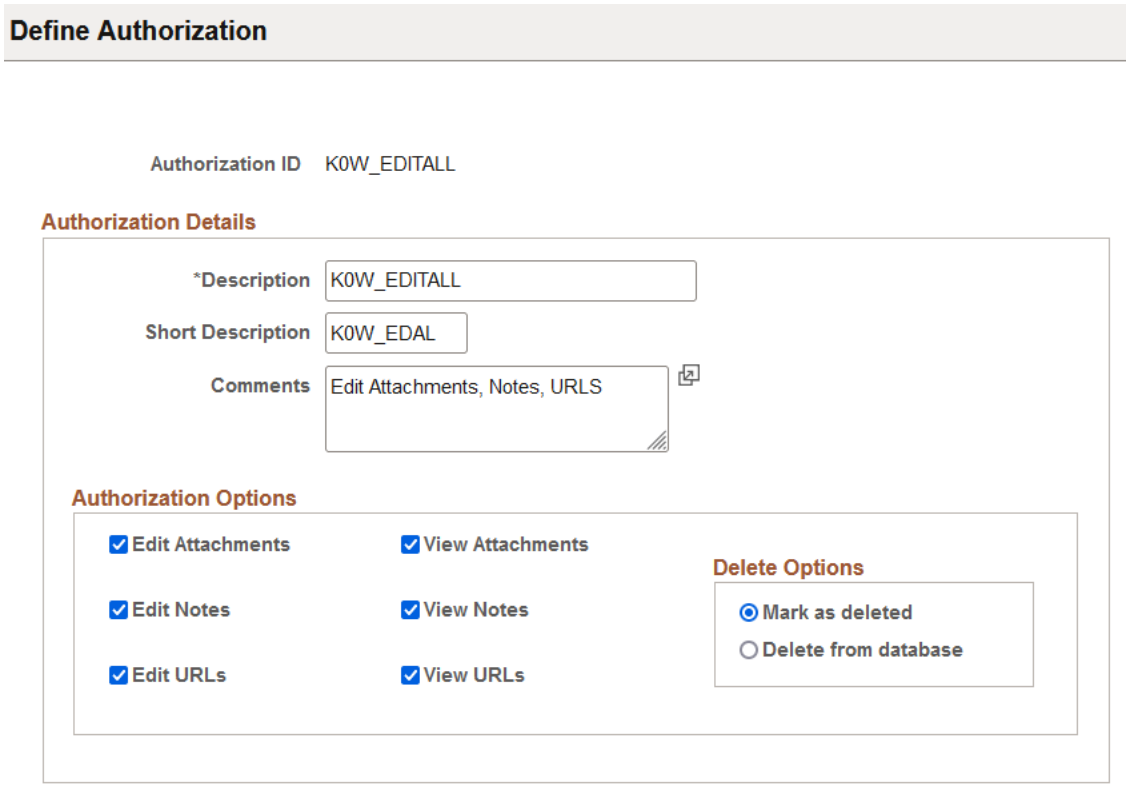
Use the Define Authorization page (HR_ATT_AUTH) to enter and maintain attachment authorization IDs which specify the level of user access for attachments.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Attachments**, and then **Define Authorization**, and then **Define Authorization**

This example illustrates the fields and controls on the Define Authorization page.

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Authorization Options

Field or Control	Description
Edit Attachments	Select the check box to enable the user to create, update, or delete attachments. The system automatically selects the **View Attachments** check box when you select the **Edit Attachments** check box and save the page.
View Attachments	Select to enable users to view attachments.
Edit Notes	Select the check box to enable the user to create, update, or delete notes. The system automatically selects the **View Notes** check box when you select the **Edit Notes** check box and save the page.
View Notes	Select to enable users to view notes.
Edit URLs	Select the check box to enable the user to create, update, or delete URLs. The system automatically selects the **View URLs** check box when you select the **Edit URLs** check box and save the page.
View URLs	Select to enable users to view URLs.

Delete Options

Select an option to determine the action of the system when the user deletes a existing attachment, note, or URL.

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> **Note**
>
> The options in this group box are not available unless one or more of the editing fields, **Edit Attachments, Edit Notes,** or **Edit URLs,** are selected.

Field or Control	Description
Mark as deleted	Select to enable the user to track the deleted attachments. When an object is deleted, the system still lists the object as an attachment and it appears in the scroll area list of existing attachments with the object's status as *Deleted* and the status column is grayed out. It cannot be selected when deleted.
Delete from database	Select to enable the users to immediately and completely delete the attachment from the database. You will get a confirmation before deleting it.

> **Note**
>
> Both **Mark as deleted** and **Delete from database** get a confirmation before deleting it.

Define Authorization Entries Page

Use the Define Authorization Entries page (HR_ATT_AUTH_ENT) to associate attachment authorizations with user roles.

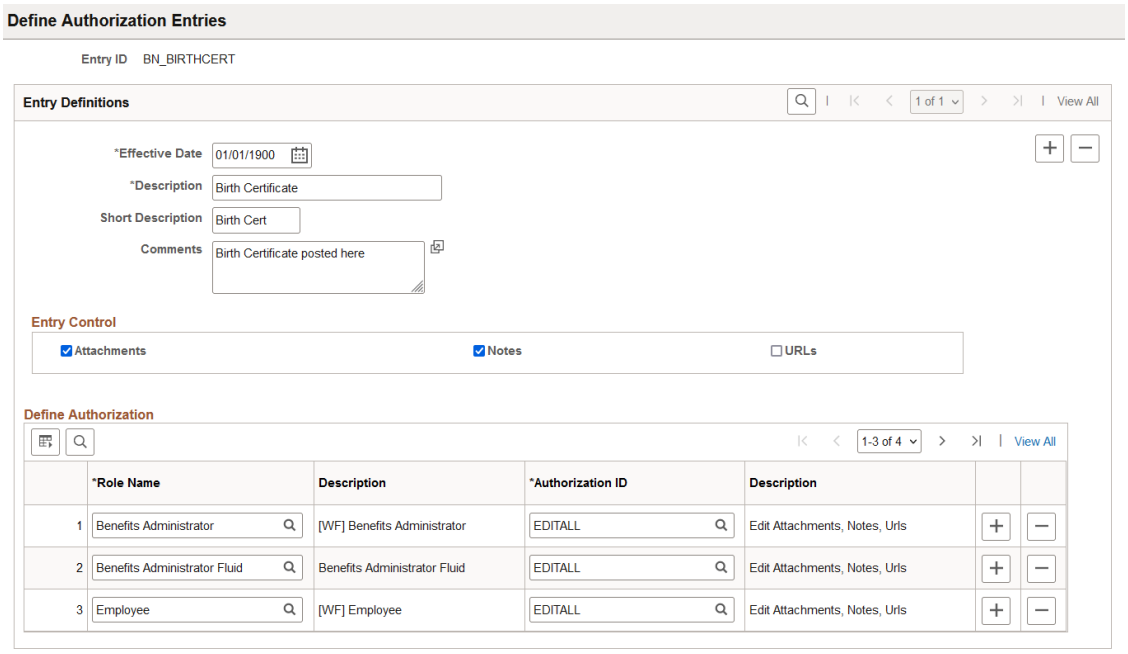
> **Important**
>
> For Life Events process, when you create the Entry ID, it should always be prefixed with BN_. For example: BN_BIRTH.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Attachments**, and then **Define Authorization Entries**, and then **Define Authorization Entries**

This example illustrates the fields and controls on the Define Authorization Entries page.

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Field or Control	Description
Entry ID	Displays the unique identifier for the attachment authorization entry.
Effective Date	Enter the date on which the Attachment ID entry becomes active. The default value for a newly inserted row is the current system date.
Description	Enter the description for the authorization entry.
Attachments, Notes, and **URLs**	Select to allow the role names listed in the **Define Authorization** area to create attachments based on the specified **Authorization ID.** You must select at least one of the options in the **Entry Control** region. Select any of the three options: • Attachments • Notes • URLs

Define Authorization

Use this section to specify the operations a role can perform by associating a role with an attachment authorization ID. Select the role name and then select a valid authorization ID in each row. Only one authorization ID can be assigned to each role, but multiple roles can share the same authorization ID. For example, if a user has the role name *Employee* or an administrator role, you can specify that the user can view and edit attachments or notes.

Field or Control	Description
Role Name	Select a role name. This field prompts against the Role Definition Table (PSROLEDEFN).
Authorization ID	Select an authorization ID. This field prompts against the Authorization IDs.

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Define Attachments Page

Use the Define Attachments page (HR_ATT_CNFG) to associate attachments and their authorizations and create links on the page displayed in the target application.

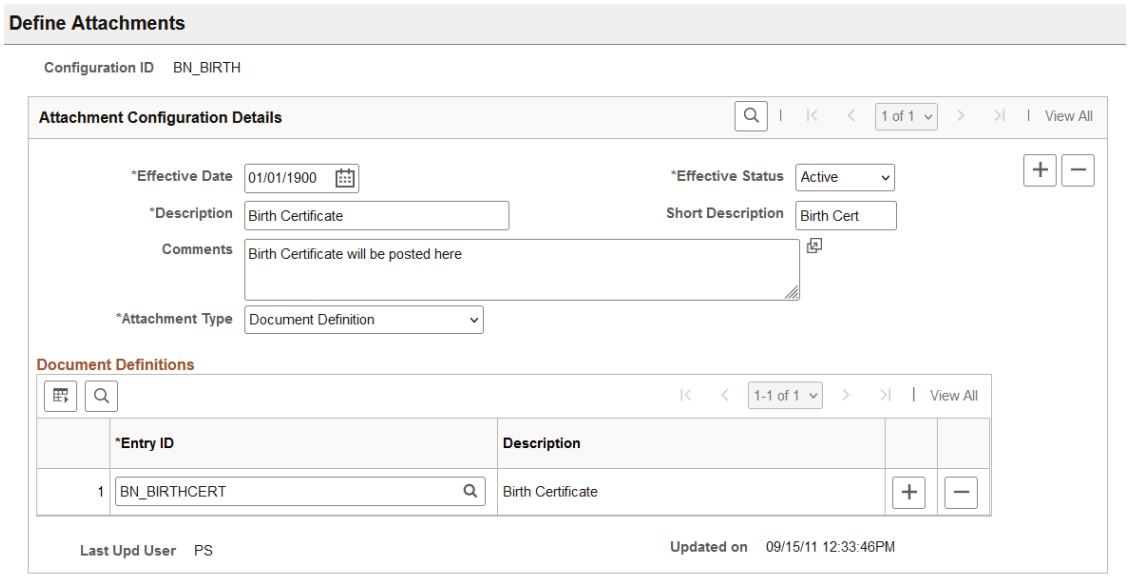
The attachments entries **Configuration IDs** allow you to add attachments that are common to more than one employee and to select entry IDs already defined to enable users to add their own attachments to a specific row of application data.

> **Important**
>
> For Life Events processes, when you create the configuration ID, it should always be prefixed with *BN_*. For example: *BN_MAR_CERT*.

Navigation:

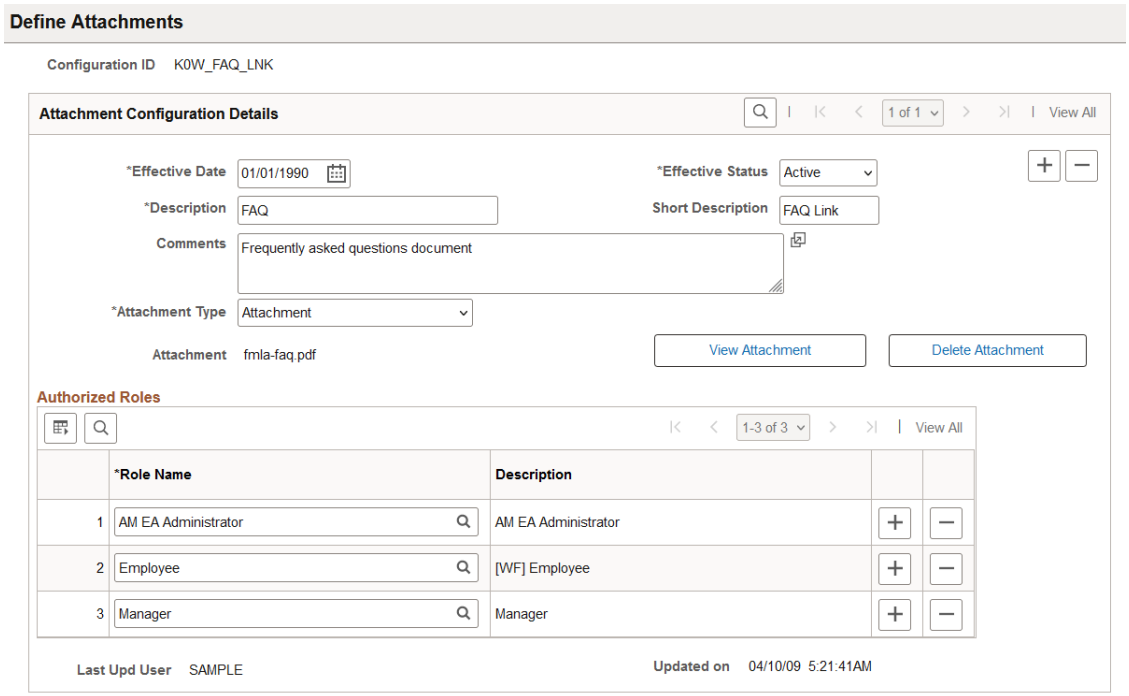
Set Up HCM, and then **Common Definitions**, and then **Attachments**, and then **Define Attachments**, and then **Define Attachments**

This example illustrates the fields and controls on the Define Attachments page with document definitions and entry IDs.



This example illustrates the fields and controls on the Define Attachments page with authorized roles.

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Field or Control	Description
Configuration ID	Displays the unique identifier for the attachments (Key Field).
Effective Date	Enter the date on which the attachment becomes active. The default value for a newly inserted row is the current system date.
Effective Status	Select either *Active* or *Inactive*. The default value is *Active*.
Description	Enter a description for the configuration ID. This description appears in the group boxes as a label for the link to the attachment.
Attachment Type	Select the type of attachment users can attach or access. Values are: • *URL* • *Attachment* • *Document Definition* Based on your selection, the remainder of the fields on the page vary. Select either *Attachment* or *URL* if you want to define common attachments or URLs such as policies, handbooks, FAQs, and so on. Select *Document Definition* if you want to create an entry that enables users to create their own attachments for a specific row of application data. **Note:** (Fluid) For now, only the *Document Definition* type is supported as part of the support given to Fluid Interface for the desktop.

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Field or Control	Description
Attachment	This field is visible when you select *Attachment* as the **Attachment Type**. After uploading the file, this field displays the file name of the attachment. Select the **Add Attachment** button and enter the file name of the attachment. You can then use the **View Attachment** and **Delete Attachment** buttons to manage the content of the attachment.
Add Attachment buttons	This field is visible when you select *Attachment* as the **Attachment Type**. Select to add the file listed in the **Attachment** field. This button is visible only if the **Attachment Type** is *Attachment* and a file has not yet been uploaded.
View Attachment and **Delete Attachment** buttons	These buttons are visible when you select *Attachment* as the **Attachment Type** and a file has been uploaded. Use these buttons to manage the content of the file listed in the **Attachment** field.
URL and **URLID**	This field is visible when you select *URL* as the **Attachment Type**. Enter the desired URL to attach as a link.

Document Definitions

This section is visible when you select *Document Definition* as the **Attachment Type**.

Enter the list of defined authorization entries that the user can upload as an attachment.

Field or Control	Description
Entry ID	Select the authorization entry that you want users to upload to the system. This field prompts against the Authorization Entries table, for example PS_HR_ATT_ENT_TBL and the system lists the Authorization Entry IDs defined on the Define Authorization Entries Page.
Last Upd User (Last Updated User)	Displays the user name that last updated the Define Attachments page.
Updated on	Displays the date the Define Attachments page was last updated.

Authorized Roles

This section is visible when you select *Attachment* or *URL* as the **Attachment Type** value.

Enter the roles that you want to have access to the attachment or URL. If no role is selected, all of the available roles can see the link.

Field or Control	Description
Role Name	Select the role that you want to access the specified attachment.

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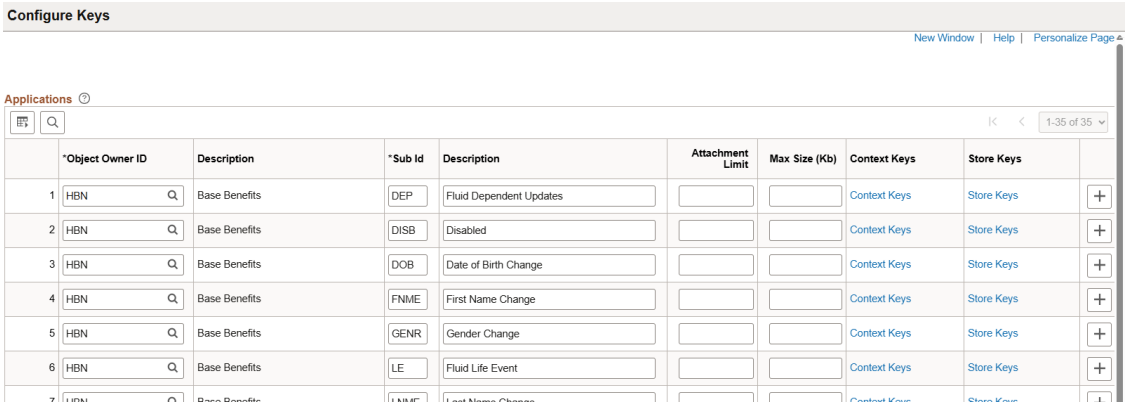
Configure Keys Page

Use the Configure Keys page (HR_ATT_KEYS_HDR) to define the prompt tables and key fields used by an application.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Attachments**, and then **Configure Keys**, and then **Configure Keys**

This example illustrates the fields and controls on the Configure Keys page.



Field or Control	Description
Object Owner ID	Enter the application in which a common component is used.
Sub Id (Sub application identifier)	Enter a sub-application identifier. Use the **Sub Id** field to create a definition for multiple lines of features within a single product line.

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Field or Control	Description
Attachment Limit	Enter the number of attachments a user will be allowed to add for this sub Id. Sub Ids consist of one or many context keys (i.e., benefit Life Events has multiple context keys including marriage, birth, adoption, and divorce) and each context key has their own attachment configuration IDs (or attachment types, like proof of marriage, proof of address change, and so forth). The limit applies to all context keys and configuration IDs defined for the sub Id on the Maintain Definitions Page. For example, if a *Birth* life event has two attachment configuration IDs, birth proof and identification proof, the cumulative attachments for both of these configuration IDs cannot exceed the attachment limit set here for the life event (*LE*) sub ID. File attachment limits are per transaction instance. When a user has uploaded the maximum number of attachments during an instance, the **Add Attachment** button is disabled. If you leave this field blank, the framework will look at the Maintain Definitions settings for limits. If both settings are blank, the user will not be restricted when uploading attachments.
Max Size (Kb) (maximum size in kilobytes)	Enter the file size limit for the sub Id transaction. The limit applies to each individual file the user uploads. The system displays a message to the user on the File Attachment page when the file exceeds the maximum size allowed,
Context Keys	Select the link to open the Attachments Context Keys Page.
Store Keys	Select the link to open the Attachments Store Keys Page.

Attachments Context Keys Page

Use the Attachments Context Keys page (HR_ATT_KEYS_C) to enter content key prompt values.

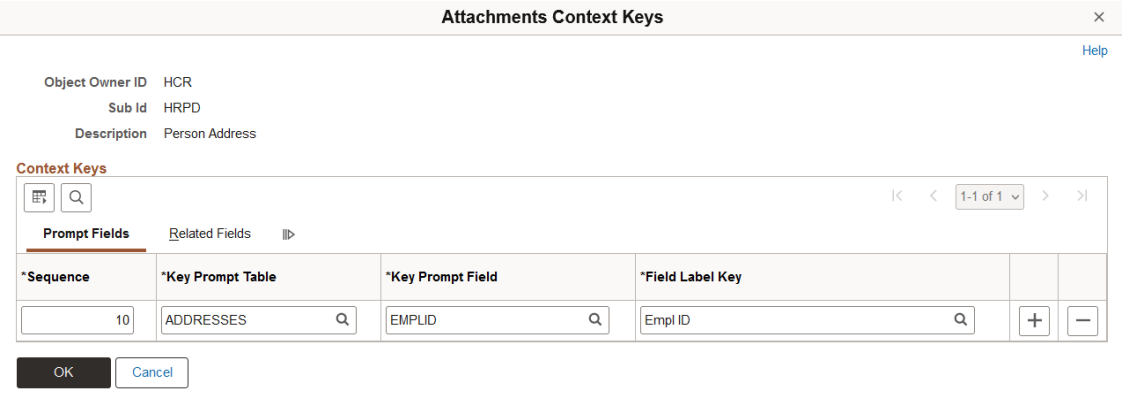
To define the contextual variations, you have to define some contextual key prompt tables/ views and key prompt fields by application in which the attachment framework will be used. These keys can come from any number or tables and are implemented as generic character fields that are defined as record keys in the data structure at application level to denote alternate “Configuration IDs” to be used under different circumstances.

Navigation:

Select the **Context Keys** link on the Attachments Context Keys Page.

This example illustrates the fields and controls on the Attachments Context Keys page.

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Field or Control	Description
Sequence	Specify the order of the context keys on the Maintain Definitions page.
Key Prompt Table	Select the object name of the prompt table that defines the values by which attachments are partitioned for a an application.
Key Prompt Field	Select the prompt table field that contains the value in the prompt list for a specified key.
Field Label Key	Select the label in the prompt table.

Related Fields tab

Select the **Related Fields** tab to select the fields related to the key prompt table and key prompt field by row.

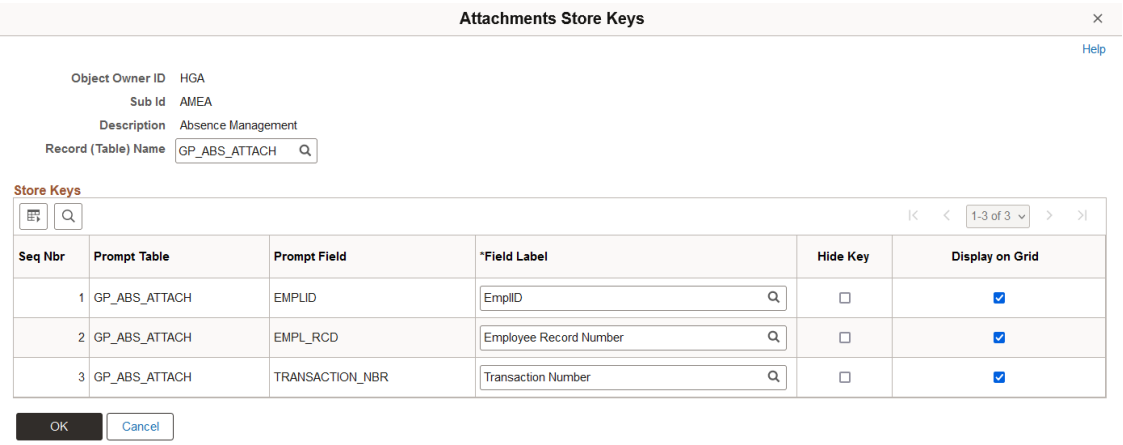
Attachments Store Keys Page

Use the Attachments Store Keys page (HR_ATT_KEYS_S) to enter store key values.

Navigation:

Select the **Store Keys** link on the Configure Keys Page.

This example illustrates the fields and controls on the Attachments Store Keys.



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Field or Control	Description
Hide Key	Select to indicate whether the key is displayed on the Document Definition page.
Display on Grid	Select to indicate whether the key field is displayed on the Document Definition Header page.

> **Note**
>
> If you are using attachments of type **Document Definition** in the Define Attachment Page, you have to create a store record to launch the **Document Definition** and store the attachments added by a user to a specific row of application data. For those **Document Definitions** added, there should be store keys defined to differentiate the row of data to which the attachment belongs. Each product can decide the number of keys to use, from 1 to N, creating its own record plus a sub-record in Application Designer to store common fields related to the attachments. Once the store record has been created, it has to be associated to the **Object Owner Id** and **Sub Id** to retrieve the key fields definitions automatically and select the store key labels. For example, the Certificates attachments attached to the Extended Absence page should be stored by employee ID (*EmplID*), *Employee Record Number* (EMPL_RCD), and *Transaction Number* (TRANSACTION_NBR).

Maintain Definitions Page

Use the Maintain Definitions page (HR_ATT_DEFN) to specify the attachment types available to an application.

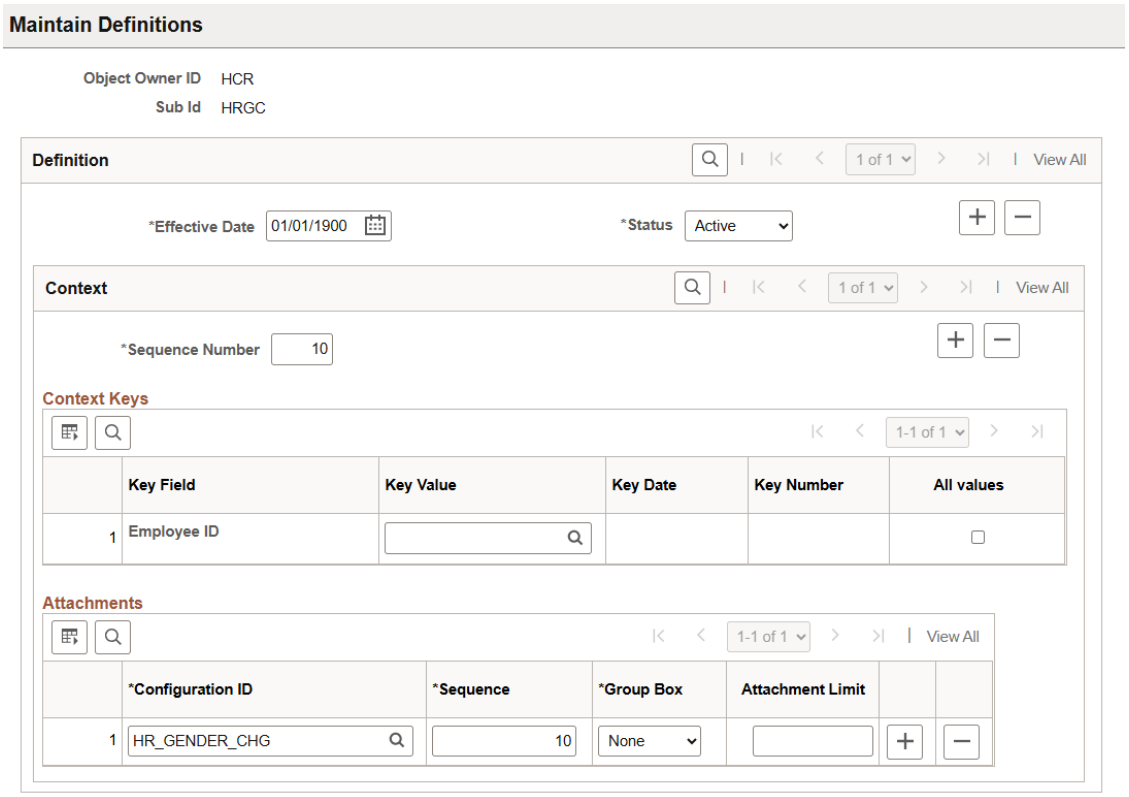
The context keys that appear on this page are determined by the Configure Keys component and are used to retrieve a list of valid configuration IDs.

Navigation:

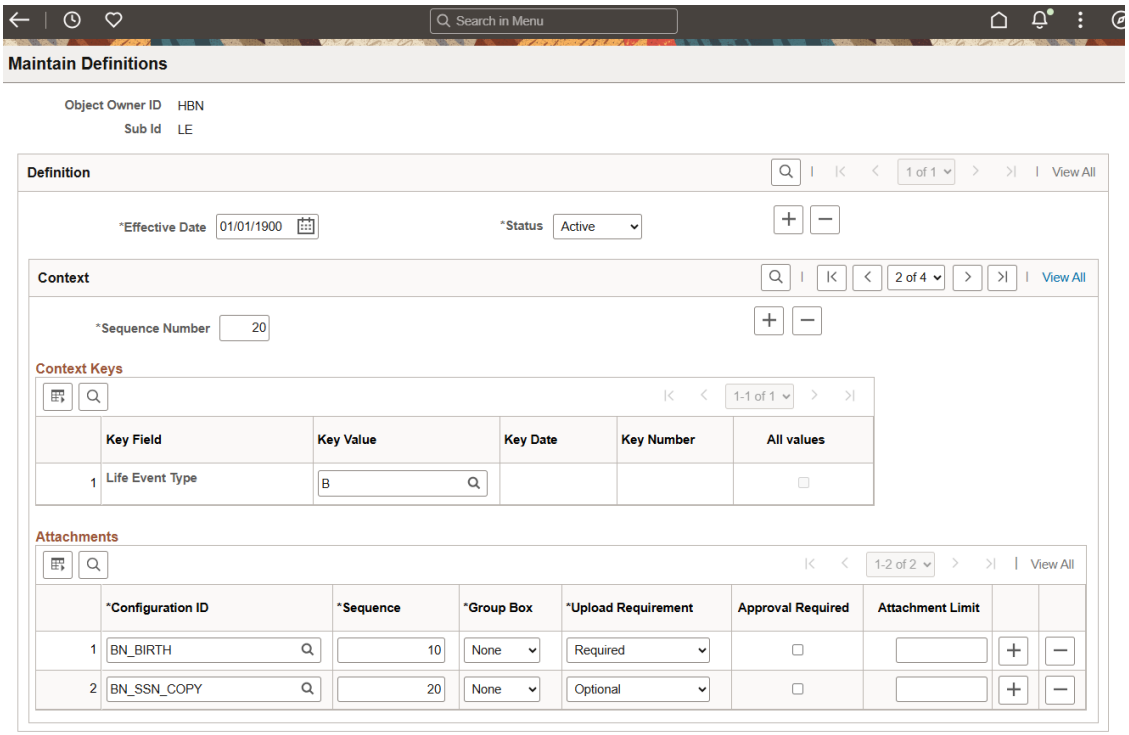
Set Up HCM, and then **Common Definitions**, and then **Attachments**, and then **Maintain Definitions**, and then **Maintain Definitions**

This example illustrates the fields and controls on the Maintain Definitions page when attachment limits are not defined on the Context Key page for this sub Id.

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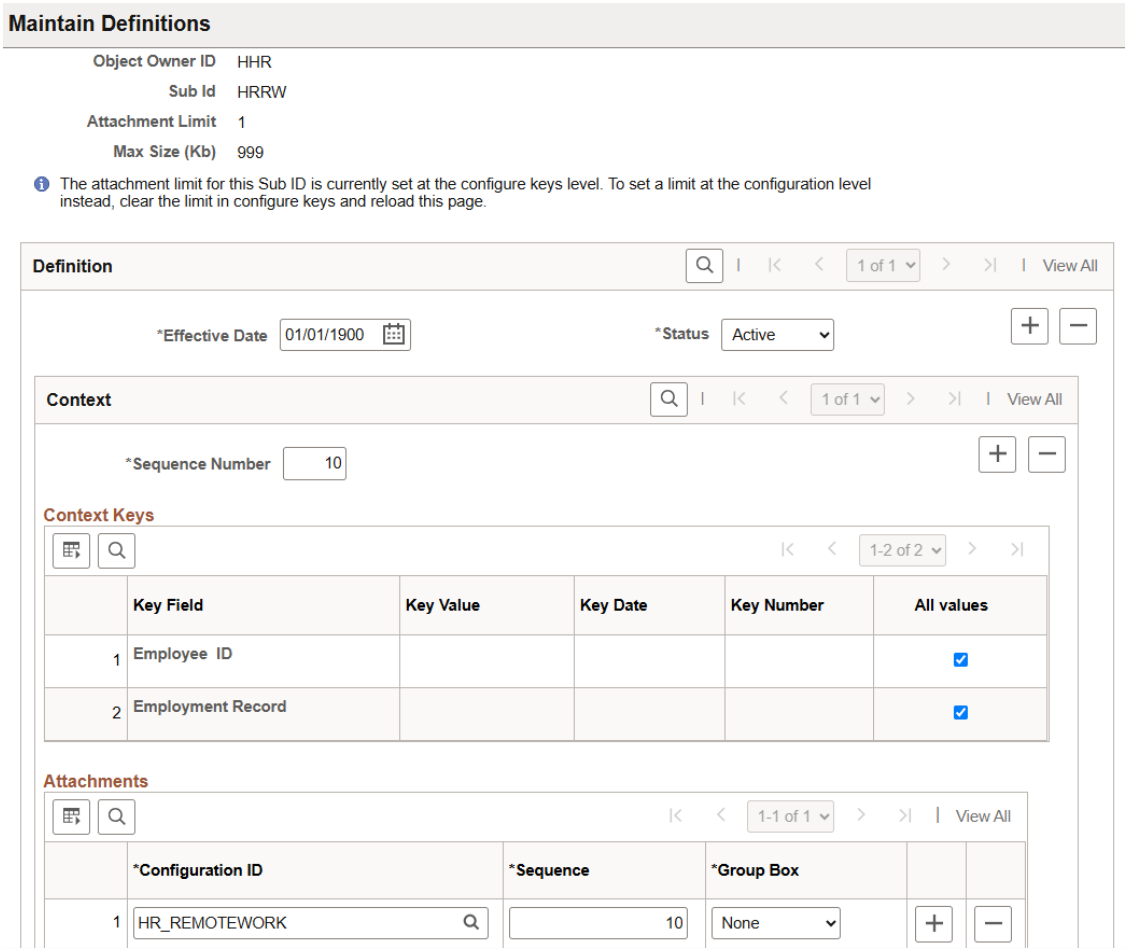


This example illustrates the fields and controls on the Maintain Definitions page when the Object Owner ID is *HBN* or *HBA* and attachment limits are not defined on the Context Key page for this sub Id.



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This example illustrates the fields and controls on the Maintain Definitions page when an attachment and size limit has been defined on the Configure Keys page for this sub Id.



Sub-Header

The following two fields may appear when attachment limits have been set on the Configure Keys Page.

Field or Control	Description
Attachment Limit	Displays the number of attachments users are allowed to upload for this sub Id, as define in the **Attachment Limit** field on the Configure Keys page. If an attachment limit is not defined for this sub Id on the Configure Keys page, this field will not appear on this page.
Max Size (Kb) (maximum size in kilobytes)	Displays the file limit size allowed for all attachments for this sub Id, as define in the **Max Size (KB)** field on the Configure Keys page. If a size limit is not entered for this sub Id on the Configure Keys page, this field will not appear on this page.

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Field or Control	Description
(attachment limit information icon)	Displays a message when an attachment limit is defined on the Configure Keys page for this sub Id. If the attachment limit is cleared on the Configure Keys page for this sub Id, this message will not appear and you can enter attachment limits on this page at the **Attachments - Configure ID** level.

Context

Field or Control	Description
Key Field	Displays the list of context keys specified on the Attachments Context Keys Page.
Key Value, **Key Date**, and **Key Number**	Select a valid value for the specified key field. The available field depends upon the Key Field type. For example, Cycle ID is a CHAR type field, so the **Key Value** field is available and the **Key Date** and **Key Number** fields do not allow you to enter data. The Budget Period Start Date is a DATE type field, which means the **Key Date**field is available and the **Key Value** and **Key Number** fields do not allow you to enter data. None of these fields are available when the **All Values** check box is selected.
All Values	Select to specify that any value for the specified key field is valid. Selecting this field makes the **Key Value** field unavailable.

Attachments

Field or Control	Description
Configuration ID	Select a valid configuration ID. Only active attachment configuration IDs are displayed.
Sequence	Enter a number to specify the order in which the hyperlinks to attachments are retrieved from the database.
Group Box	Select the group box where the hyperlink label is displayed. Values are: *Related Links, Other Links,* and *None.*

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Field or Control	Description
Upload Requirement	This field is available for the *HBA* and *HBN* object owner IDs only. Select the option to indicate the requirement for document upload under this category. Available options are: • If the status is *Required*, it is mandatory to upload a document under this category for the selected ID. • If the status is *Optional*, it is optional to upload a document under this category for the selected ID. • If the status is *Require at least one*, it is mandatory to upload at least one document under this category for the selected ID.
Approval Required	This field is available for the *HBA* and *HBN* object owner IDs only. Specify if this document requires approval. If selected, the document will be send to the approver(s) based on the configured approval framework. The system marks the Upload Document step as complete only if all the documents that are required to upload are uploaded and all the documents that require approval are approved.
Attachment Limit	This field is available when an attachment limit is *not* set on the Configure Keys Page. When a limit has been set on the Configure Keys page, this field will be hidden. Enter an attachment limit for this configuration ID. This limit applies to this configuration ID only and not other attachments for this sub Id. **Warning!** If you have set a limit on this page and then someone adds an attachment limit on the Configure Keys page without clearing the limits on this page, the Configure Key page limit will take precedence.

> **Note**
>
> The context keys are not displayed the first time you open the Maintain Definitions page. You must enter the sequence number and then the context keys automatically display.
>
> URL Properties for URL definition *HR_ATTACHMENT_FLU* can be configured for restricting the file types that can be uploaded to or downloaded by the Fluid Attachment Framework.

The following video provides an overview of Attachments - Enhanced View of Types and Categories:

Video: Image Highlights, PeopleSoft HCM Update Image 32: Attachments - Enhanced View of Types and Categories

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Implementing the Attachment Framework

Implement the attachment framework using the application class methods in the HR_ATTACHMENTS application package PeopleSoft delivers.

There are two classes in the delivered application package.

- *Attachment_Data* application class: enables you to create an object containing entries for all of the link labels, configuration IDs and group boxes that contain the links to the defined attachments.
- *Attachment_UI* application class: enables you to manage the user interface for the attachments.

Attachment_Data Application Class GetAttachmentLink Method

The GetAttachmentLink method uses the effective date and the context keys array to retrieve the configuration IDs from the database. Then these entries are loaded into a standalone rowset for further filtering by role name.

The GetAttachmentLink method accepts these parameters:

Input Parameter	Description
&EffDt	Specify the effective date as a date.
&Ckeys	Specify the context key values as an array of strings. The values must be in the same order as defined on the Context Key page.
%UserID	(Optional) Use the system variable to specify the current user.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.
&Roles	(Optional) Specify the roles as an array of strings.

The method returns an array object that contains entries for all link labels, configuration IDs, and group boxes to which the current user has access.

There are two options to discover or retrieve the current user's roles, depending on the values passed of &Roles, %Component, or %UserID:

1. The system uses the %UserId and %Component variables to discover all of the valid role names for each content reference and user ID in order to perform the filtering.
2. Using the &Roles array of strings, only the role names in the array are considered for filtering.

> **Note**
>
> You must choose one of these options in order to perform further filtering by role name. The system automatically uses the &Roles array of strings if you pass all three parameters at the same time.

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Attachment_Data Application Class SameAttachmentSetup Method

The SameAttachmentSetup method accepts these parameters:

Input Parameter	Description
&EffDt	Specify the effective date as a date.
%UserID	(Optional) Use the system variable to specify the current user.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.
&Roles	(Optional) Specify the roles as an array of strings.
&cKeys	Specify the current context key values as an array of strings.
&oKeys	Specify the prior context key values as an array of strings. This is the value of the field the last time the component was saved.

The method returns a boolean value (True/False).

The system uses the &EfftDt and &cKeys to retrieve the Configuration IDs using the current context keys values. The system uses the &EfftDt and &oKeys to retrieve the Configuration IDs using the context keys values from the last time the component was saved. Using the %UserId and %Component system variables the system discovers all of the valid role names for each content reference and user ID in order to perform the filtering. Using the &Roles array of strings only the role names that are in the array are considered for the filtering. Then these entries are loaded into arrays for comparison. If the current Configuration IDs are the same as the prior Configuration IDs, then the method returns the value True. If the return is True, the product that intends to implement this functionality has the option to delete the invalid attachments or leave them in the database.

Attachment_UI Application Class Attachment_UI (Constructor) Method

The statements contained in this method provide the initialization of the class and instantiates new objects of the Attachment_UI class.

The Attachment_UI (Constructor) method accepts these parameters:

Input Parameter	Description
&tOwrId	(Optional) Specify the Text Catalog Object Owner ID.
&tSubId	(Optional) Specify the Text Catalog Attachment Sub ID.
&OwrId	Specify the Object Attachment Owner ID.
&SubId	Specify the Object Attachment Sub ID.

No return parameters are available.

Attachment_UI Application Class GetAttachmentType Method

The Configuration ID and the Effective Date are used to retrieve the attachment type from the Attachment Configuration Table (HR_ATT_CNFG_TBL.)

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The GetAttachmentType method accepts these parameters:

Input Parameter	Description
&CnfgId	Specify the hyperlink Configuration ID.
&EffDt	Specify the Effective Date as a date.

The method returns the attachment type as one of the following string values:

- <001> for a URL attachment type.
- <002> for an ATTACHMENT attachment type.
- <003> for a DOCUMENT DEFINITION attachment type.

> **Note**
>
> Only type 003 attachment types can be edited.

Attachment_UI Application Class OpenAttachment Method

The system uses the Configuration ID value (&hCnfgID) and the Effective Date (&hEffDt) to retrieve the attachment type from PS_HR_ATT_CNFG_TBL using the GetAttachmentType method. If the attachment type is *Attachment* or *URL* then the specified attachment file or URL is opened in a new window. Otherwise, the user is transferred to the Attachment User Interface – (Component: HR_ATT_DD). To enable the user to open the component ensure that the corresponding store key record and store key field labels are defined.

The OpenAttachment method accepts these parameters:

Input Parameter	Description
&tOwrId	(Optional) Specify the Text Catalog Object Owner ID.
&tSubId	(Optional) Specify the Text Catalog Attachment Sub ID.
&OwrId	Specify the Object Owner ID.
&SubId	Specify the Object Attachment Sub ID.
&hCnfgID	Specify the hyperlink Configuration ID (use the value that the GetAttachmentLinks method returns in the array).
&hEffDt	Specify the effective date.
%UserID	Use the system variable to specify the current user.
&sKeys	Specify the Store Keys values as an array of strings.
&hRole	Specify the Role Name (use the value that the GetAttachmentLinks method returns in the array).
&dOnly	Specify *true* or *false*. *True* specifies display only mode. *False* uses the attachment setup.

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The method returns a numeric value that indicates the number of successfully added attachment records.

Attachment_UI Application Class DelAttachments Method

The DelAttachments method accepts these parameters:

Input Parameter	Description
&EffDt	Specify the effective date as a date.
&Ckeys	Specify the context key values as an array of strings.
&Roles	(Optional) Specify the roles as an array of strings.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.
%UserID	(Optional) Use the system variable to specify the current user.

The method returns an array that contains entries for all of the hyperlink labels, Configuration IDs and group boxes that the current user can access.

Attachment_UI Application Class ExistAttachments Method

The ExistAttachments method accepts these parameters:

Input Parameter	Description
&OwrId	Specify the Object Attachment Owner ID.
&SubId	Specify the Object Attachment Sub ID.
&hEffDt	Specify the effective date as a date.
&hkeys	Specify the Store Keys values as an array of strings.

The method returns a boolean value (True/False).

Delivered Text Catalog Entries

The steps to view delivered text catalog entries for attachments are:

1. Navigate to the Maintain Text Catalog page. **(Set Up HCM**, and then **Common Definitions**, and then **Text Catalog and Notepad**, and then **Maintain Text Catalog)**
2. Enter HHR in the Object owner identifier field and ATT in the Sub ID field.
3. Click Search to view the list of text catalogs for attachments.

Attachment_Fluid (Constructor) Application Class Method

The Attachment_Fluid method uses the statements that provide the initialization of the class. It Instantiates the new objects of Attachment_Fluid class.

The Attachment_Fluid method accepts these parameters:

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Input Parameter	Description
&OwrId	Specify the Object Owner Id (String).
&SubId	Specify the Object Attachment Sub Id as (String)
&ATT_Effdt	Specify the date for a transaction; for example, for Benefits Life Events transaction it can be Current date; for Absence transaction, it can be the request begin date etc.
&CKeys	Specify the current Context Keys values (array of strings)
%UserID	Use the system variable to specify the user currently logged on (optional).
%Component	Use the system variable to specify the component that is invoking the attachment framework (optional)
&MyRole	Specify the Roles (string) (*optional)
&Store_Keys_Array	Specify the Store Key values (array of strings)
&dOnly	Specify 'true' or 'false'. True – Display only mode. False – Follow the attachment setup (Boolean)

For attachment type 003, attachments are fetched from Store record based on Confid Id/Entry ID and are loaded on to the attachments grid.

The two options to retrieve or find out the role(s) to which the current user belongs, depends on the values passed by as parameters (&MyRoles, %Component, %UserID).

1. The system uses the **%UserId** and **%Component** variables to discover all of the valid role names for each content reference and user ID in order to perform the filtering.
2. Using the &Roles array of strings, only the role names in the array are considered for filtering.

> **Note**
>
> You must choose one of these options in order to perform further filtering by role name. The system automatically uses the &Roles array of strings if you pass three parameters at the same time.

Attachment_SaveProcessing Method

This method performs the Save action for any Add/Update/Delete actions performed on the attachments grid.

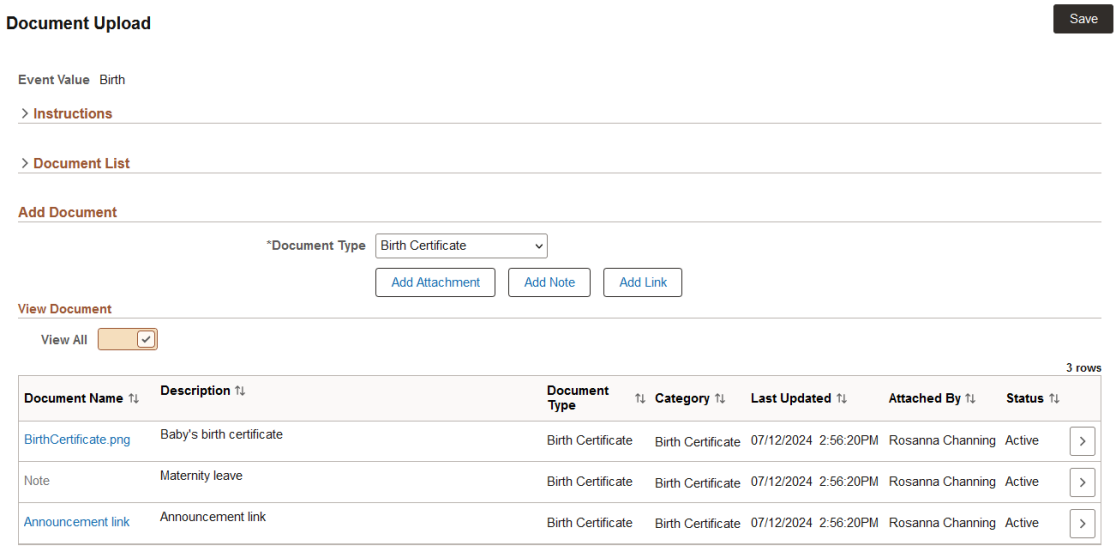
Document Upload Page or Attachments Page

Use the designated Document Upload page or Attachments page to initiate the process to upload attachments, add notes, and enter links.

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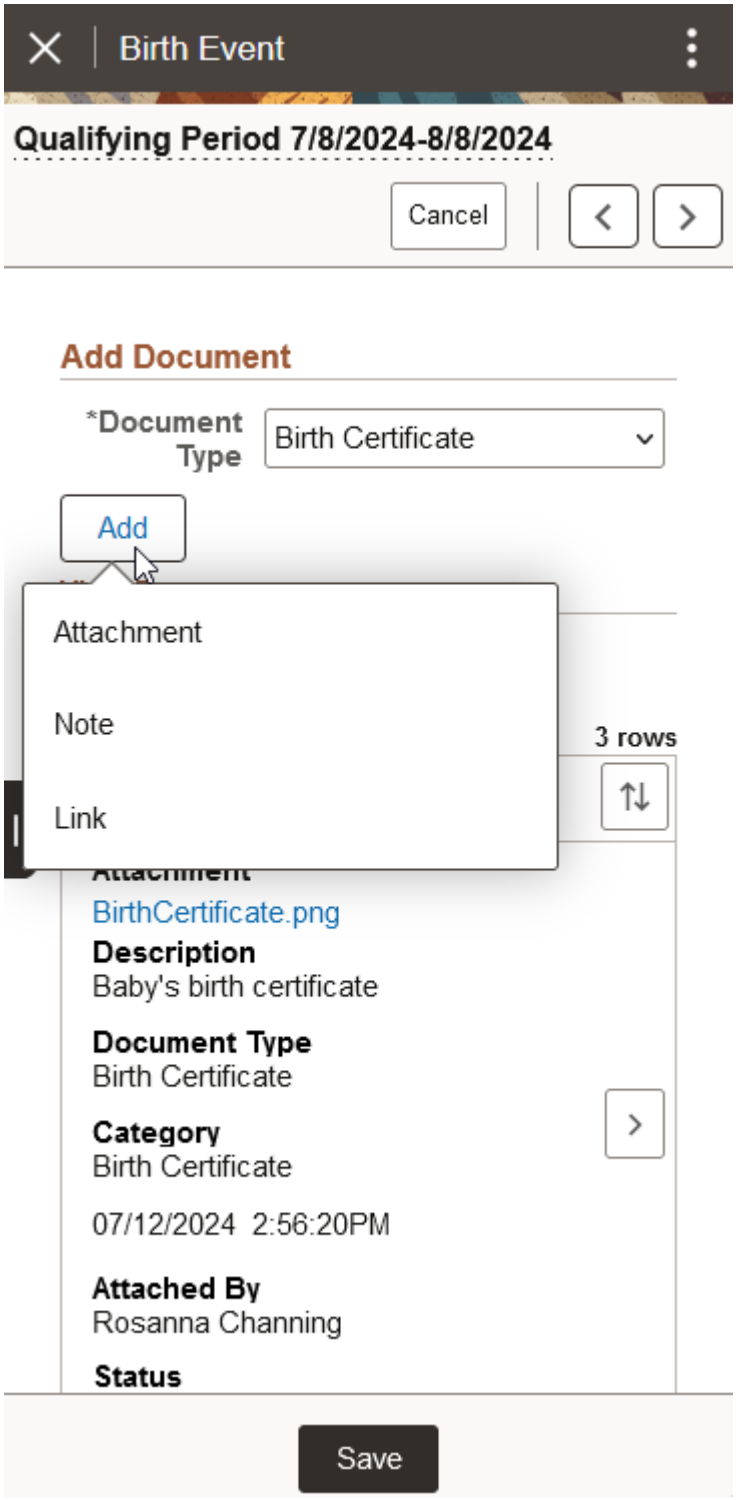
> **Note**
>
> The buttons and fields will vary based on the transaction page layout. Not all document upload or attachment pages will have the same field and control properties.

This example illustrates the fields and controls of a Document Upload page with uploaded documents.



(Smartphone)This example illustrates the fields and controls of a Document page with uploaded documents using a small form factor device.

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Field or Control	Description
Add Attachment button	Select to open the **Attachment** modal from where you can upload attachments.
Add Note button	Select to open the **Note** modal from where you can add notes.

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Field or Control	Description
Add Link button	Select to open the **Link** modal where you can insert links.
Add button	(Smartphone) A smartphone will display a common **Add** button. Select to choose from the options of **Attachment**, **Note**, or **Link**.

> **Note**
>
> Document upload options are defined on the Define Authorization Entries Page

File Attachments and Attachment Pages

Use the File Attachment or Attachment pages to add attachments:

1. Use the **Add Attachment** button to begin the upload attachments process.

   This example illustrates the fields and controls of Add Attachment page.

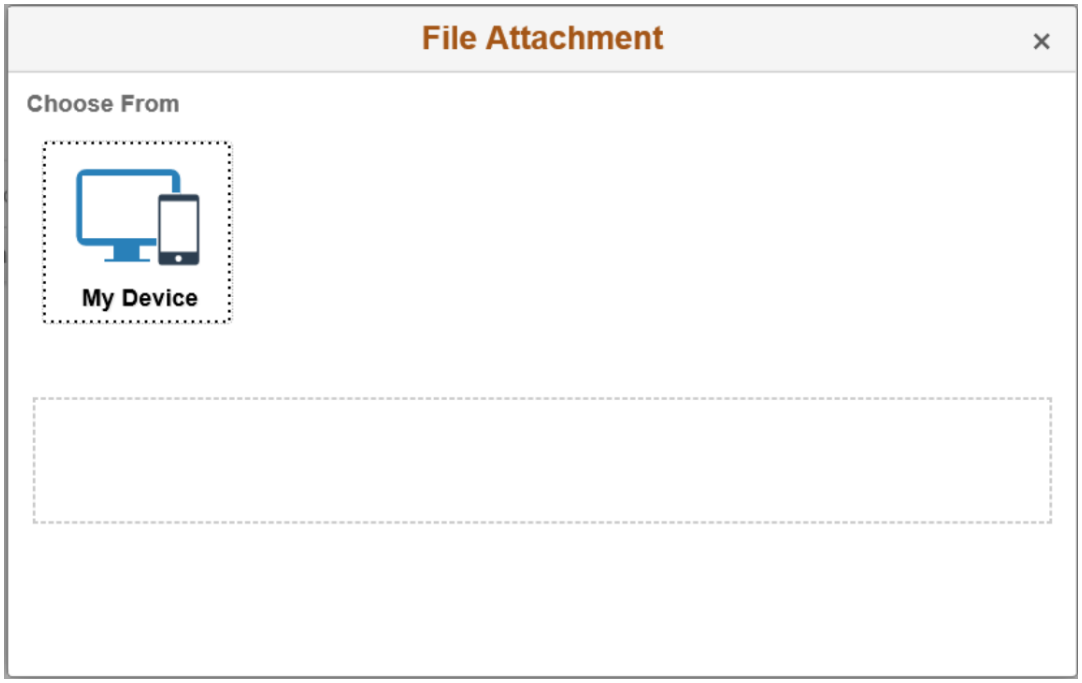


   The **Add Attachment** opens a modal from where you can upload the file as attachment from the local directory.

2. Use the File Attachment page to select the attachment location.

   This example illustrates the modal to upload the file attachment.

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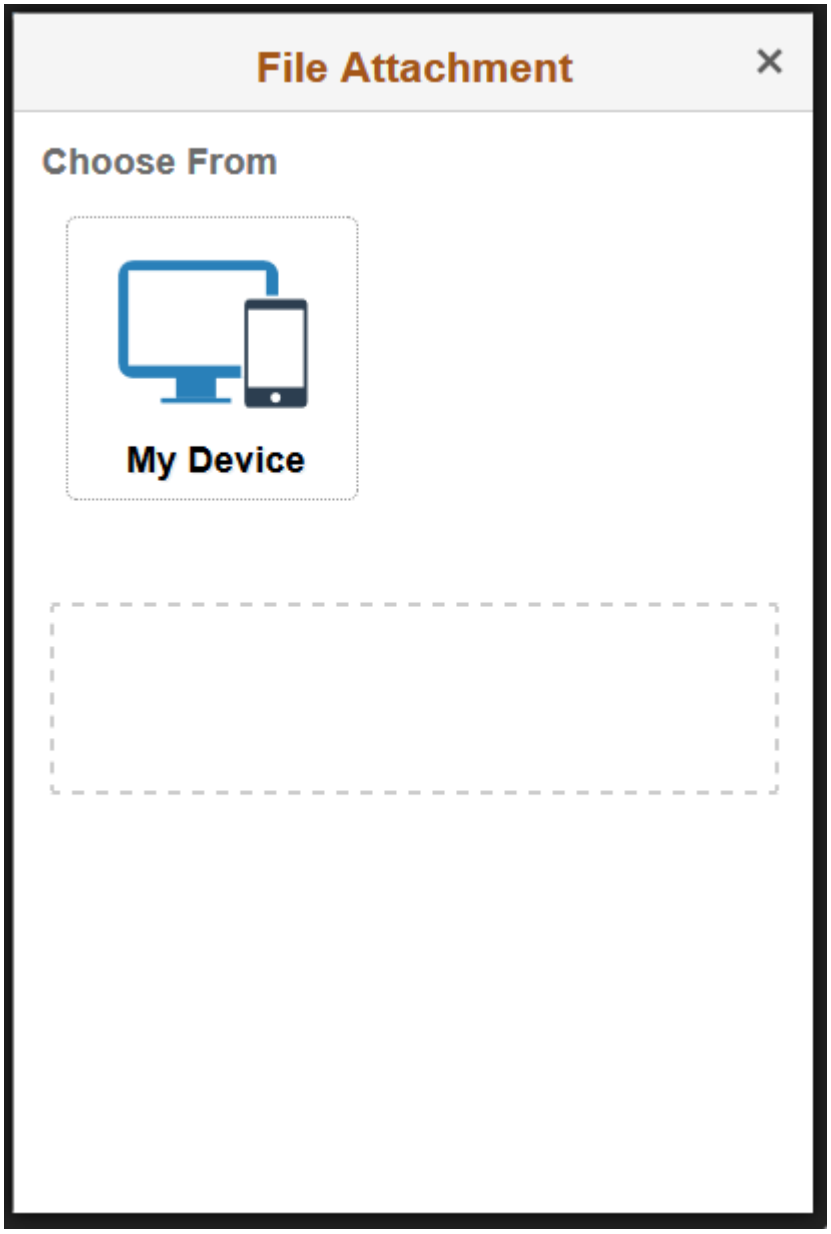


> **Note**
>
> The type of attachment which an employee or manager can add depends upon the entry control you have checked in the Define Authorization Entries Page.

3. Select **My Device** to upload an attachment from the location in your computer.

This example illustrates the fields and controls of the File Attachment modal in a Smartphone.

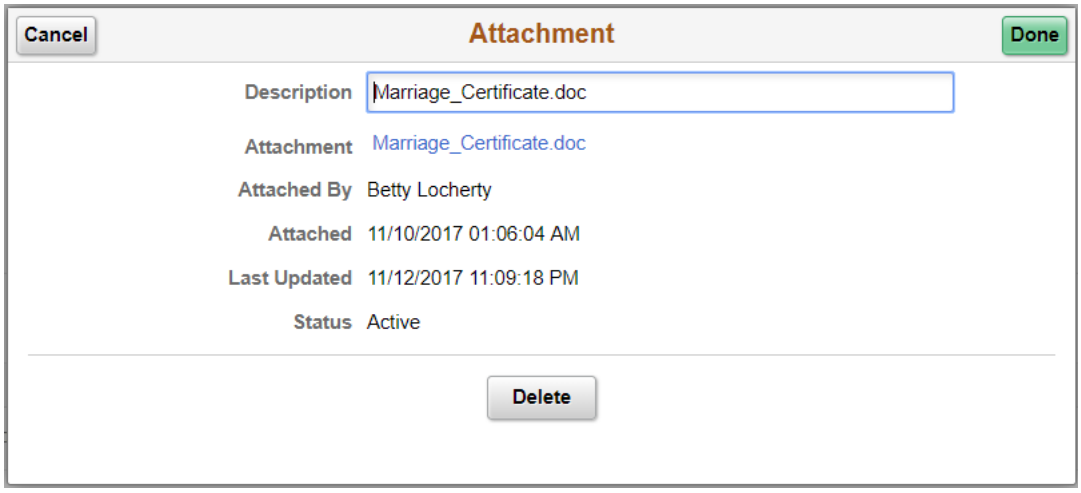
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4. After uploading the attachment, you can update attachment descriptions.

   The Attachment description can be updated using this screen.

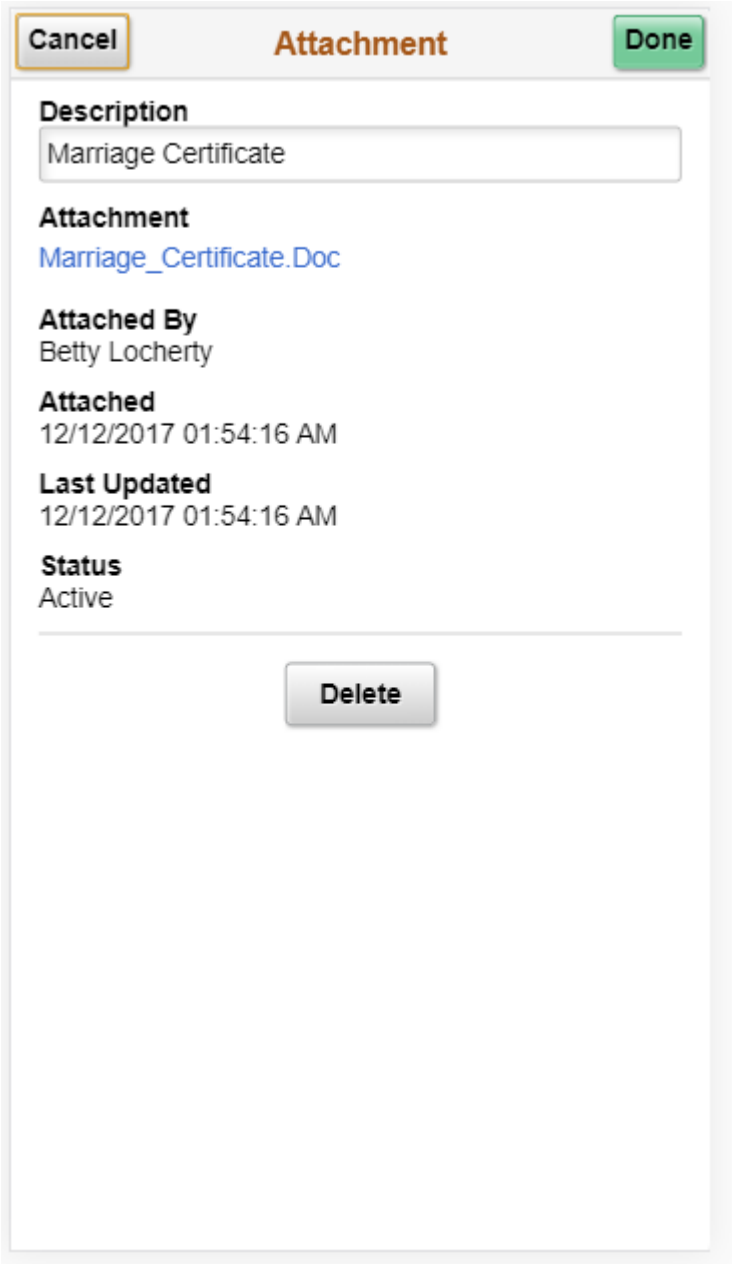
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5. After making the updates, click **Done** to save or **Delete** for deleting the attachment.

   This illustration demonstrates the attachment update screen in a smartphone.

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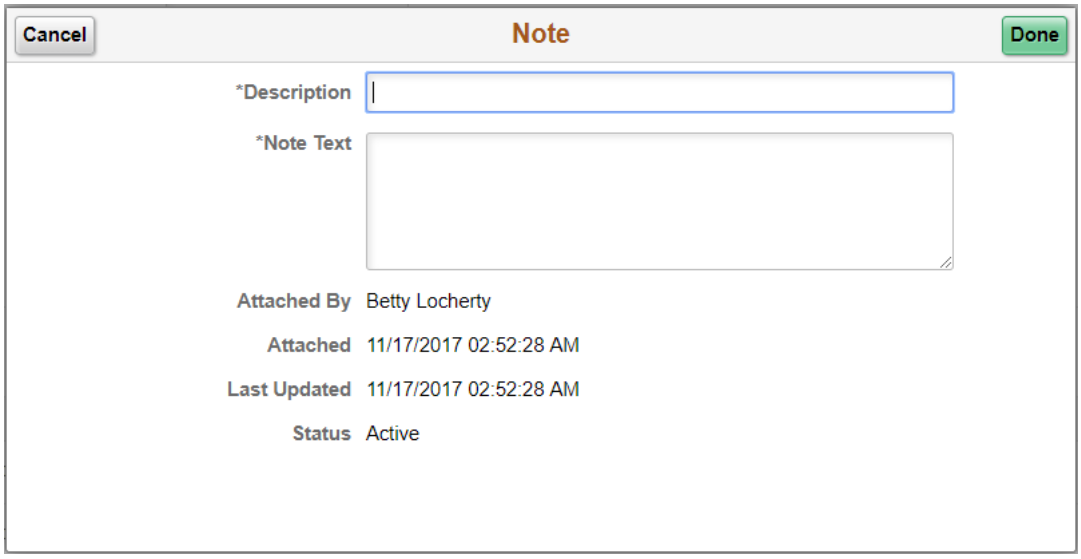
Note Pages

Use the Note pages to add or view additional comments about a transaction:

1. Select **Add Note** in the document upload, attachments, or notes page to open a modal from where you can add notes and comments.

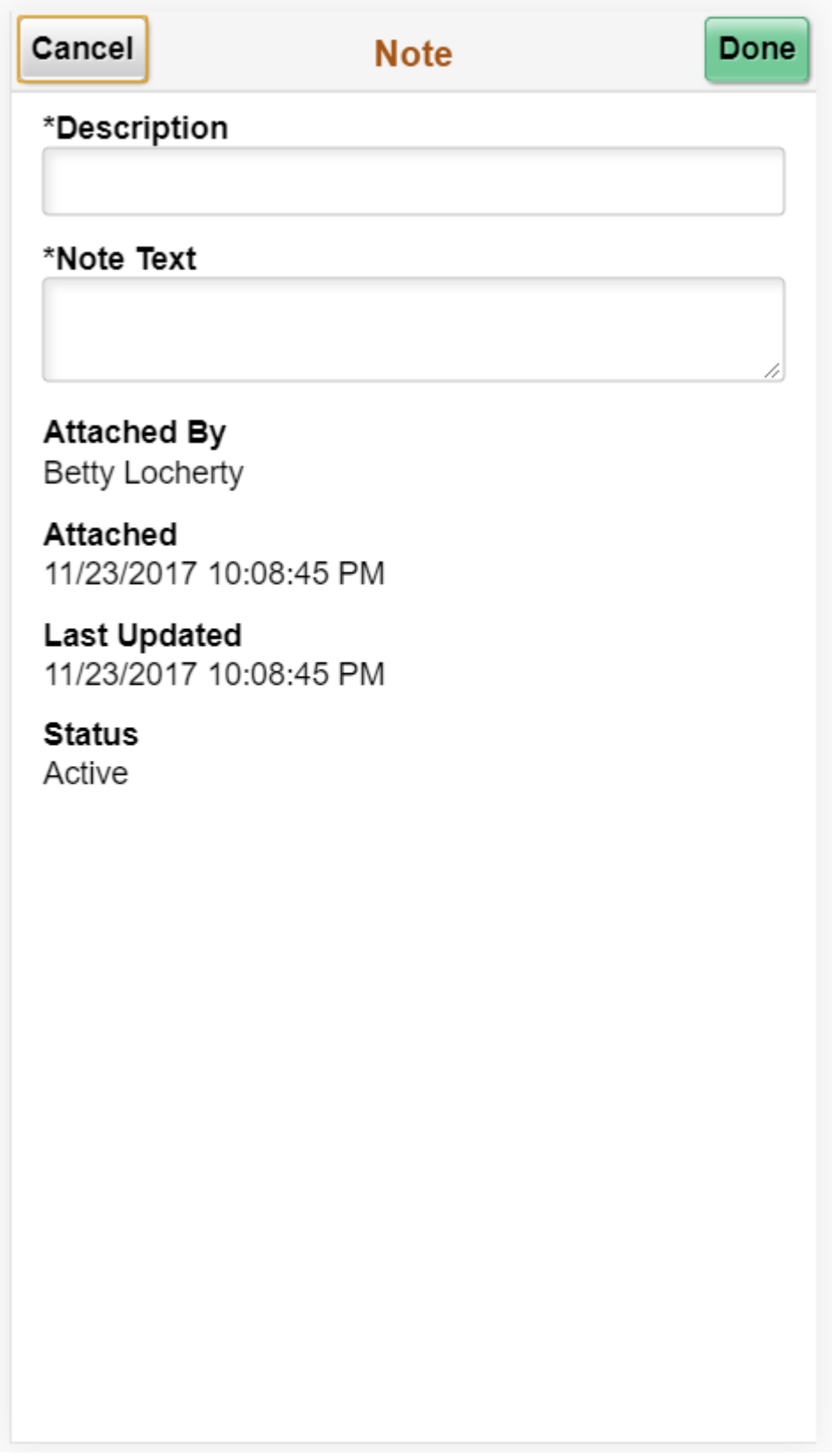
   (Desktop or Tablet) This example illustrates the fields and controls of the Note modal for uploading notes.

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(Smartphone) This example illustrates the fields and controls of the Note modal for uploading the Notes using smartphones.

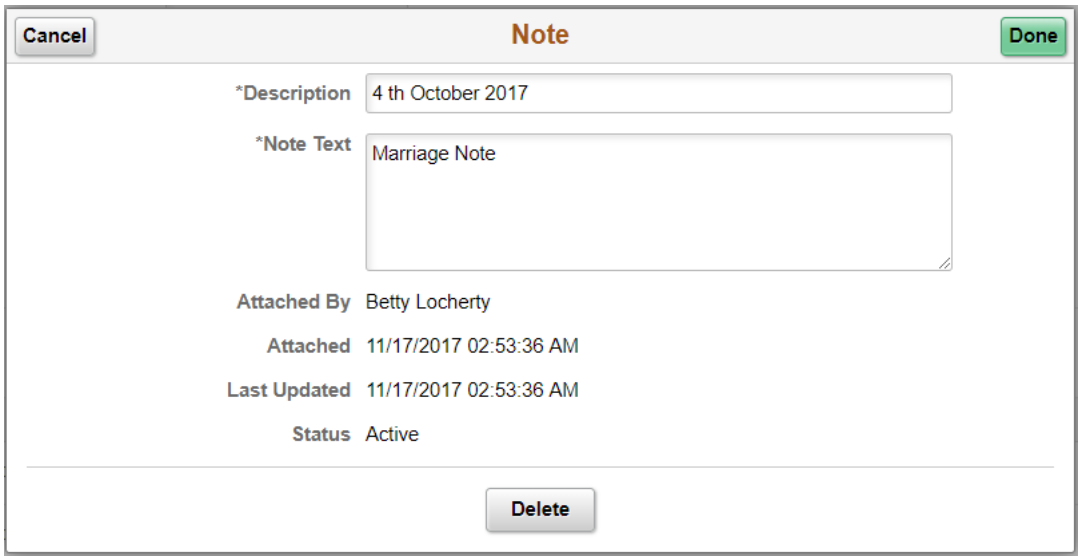
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2. View, update, or delete a note by selecting the Document Details or Edit button for an existing note.

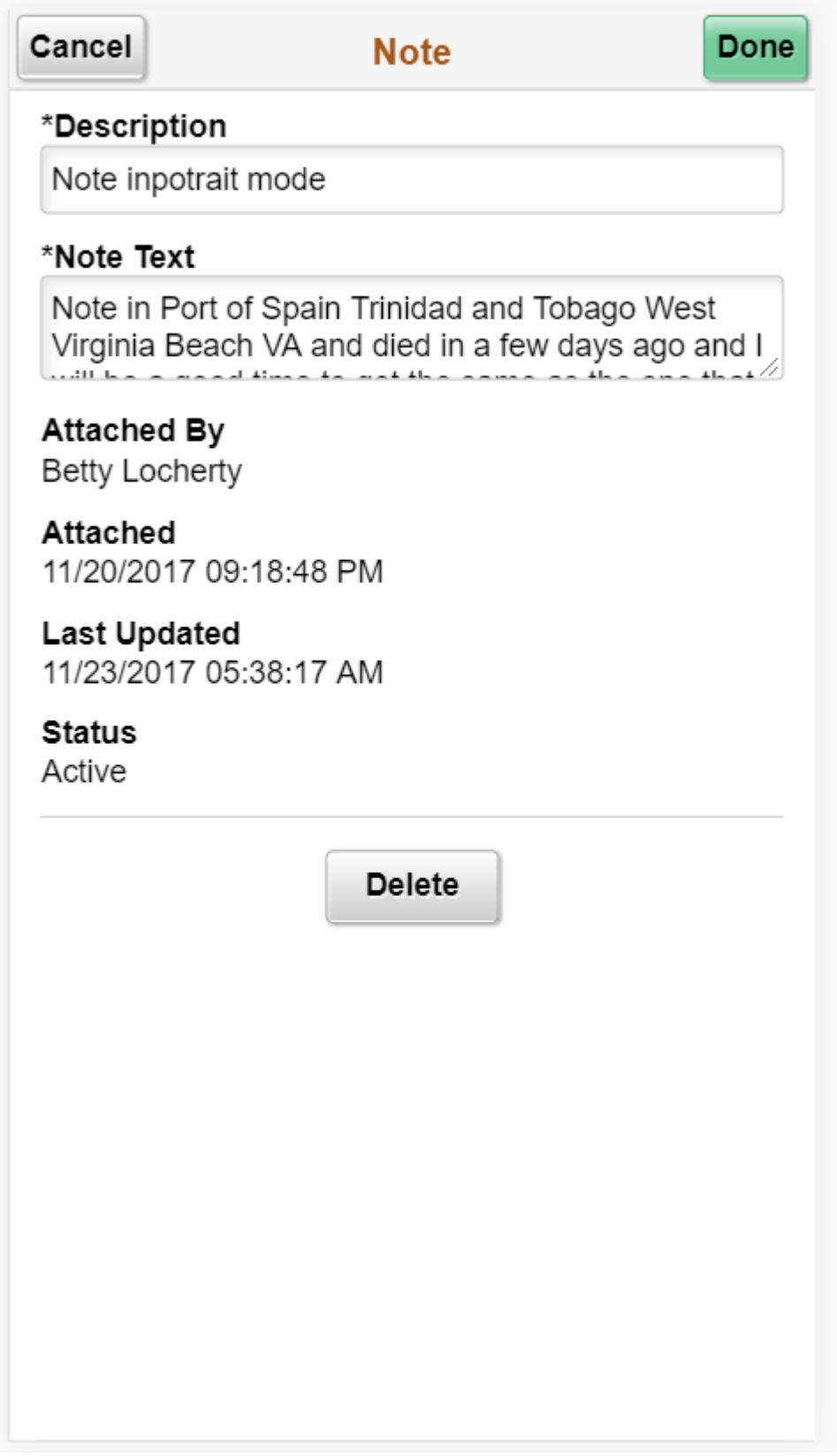
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(Desktop or Tablet) This example illustrates the fields and controls of the Note modal for viewing, updating, or deleting notes.



(Smartphone) This example illustrates the fields and controls of the Note modal for viewing, updating, or deleting notes using smartphones.

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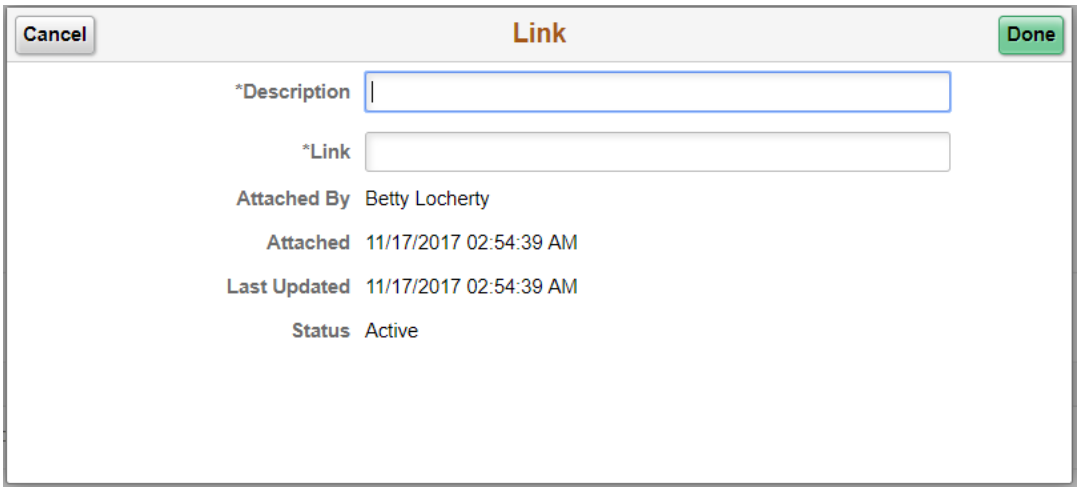
Field or Control	Description
Description	Enter the description for the file which you can going to upload.
Note Text	Enter the description which says more about the note.
Delete	This option is available when you have selected to view an existing note. Select to remove the note from the transaction.

Link Pages

Use the Link pages to include links regarding a transaction:

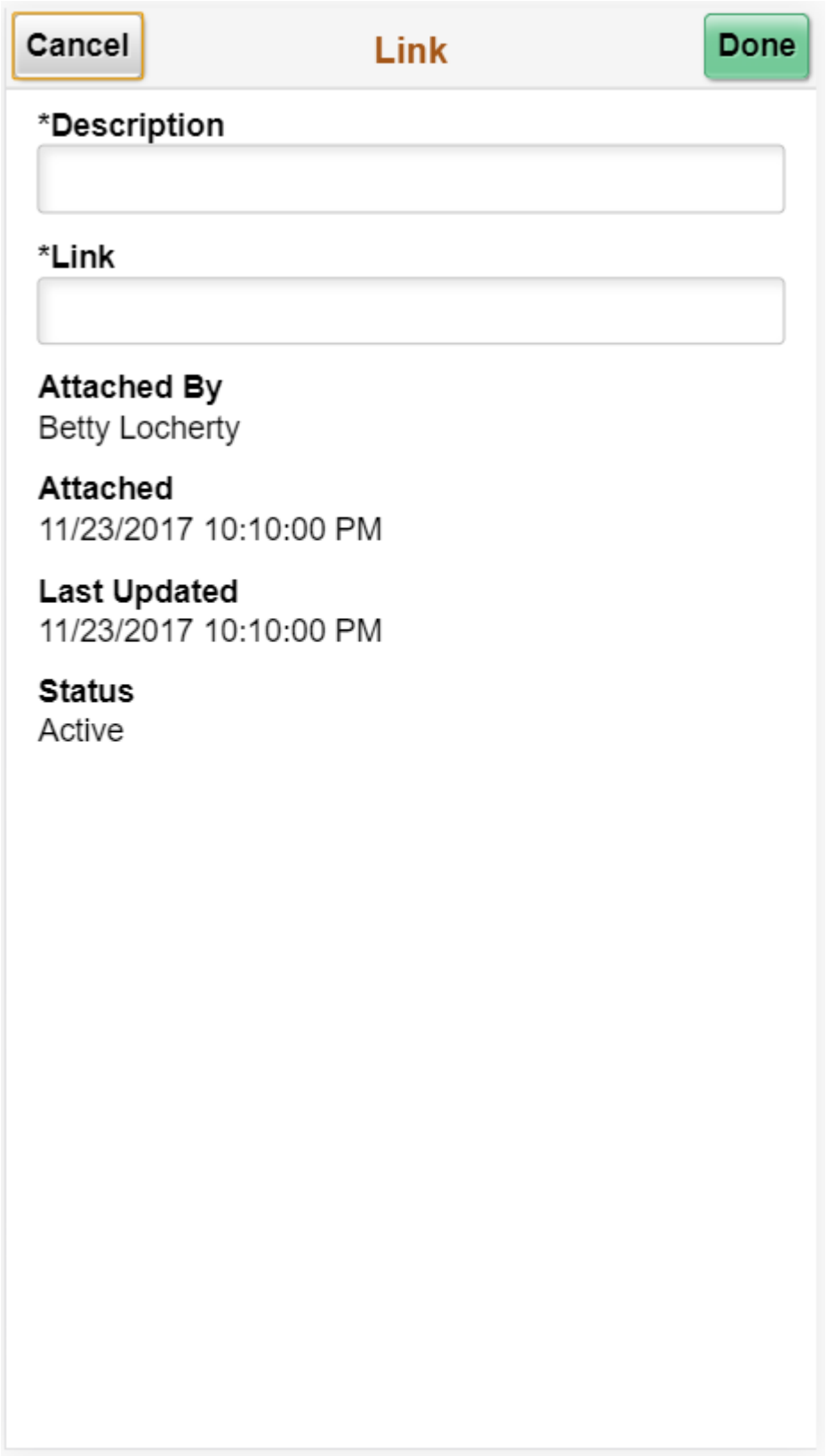
1. Select the **Add Link** in the document upload, attachments, or notes page to open a modal from where you can upload links.

   (Desktop or Tablet) This illustration demonstrates the fields and controls of Link modal to add a link.



   (Smartphone) This illustration demonstrates the fields and controls of Link modal to add a link using a smartphone.

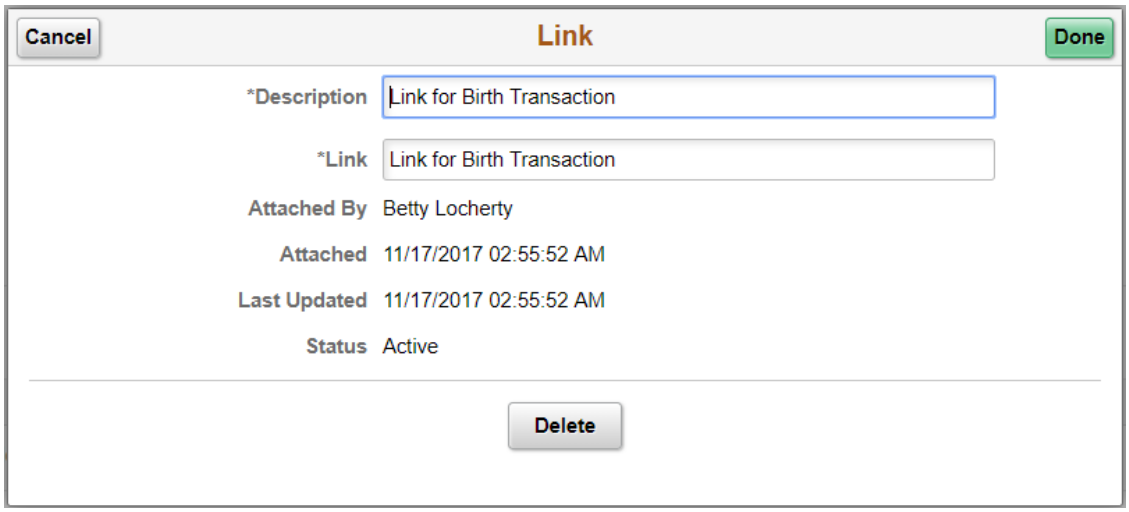
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2. View, update, or delete a link by selecting the Document Details or Edit button for an existing link.

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(Desktop or Tablet) This example illustrates the fields and controls of the Link modal for viewing, updating, or deleting links.



Defining Education-Related Information

To set up information about educational establishments and areas of study use the School Types (SCHOOL_TYPE_TABLE), Schools (SCHOOL_TABLE), Majors (MAJOR_TABLE), and Define Faculty Table JPN (FACULTY_TABLE_JPN) components.

This video demonstrates the school description length enhancement:

Video: Image Highlights, PeopleSoft HCM Update Image 52: School Description Length Expansion

These topics provide an overview of education-related information and profiles, and discuss how to define education-related information.

Pages Used to Define Education-Related Information

Page Name	Definition Name	Usage
School Types Page	SCHOOL_TYPE_TBL	Set up codes for the types of schools that employees might have attended, for example, high schools, universities, or professional schools.
Schools Page	SCHOOL_TABLE	Define codes for specific schools. The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.

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Page Name	Definition Name	Usage
Majors Page	MAJOR_TABLE	Define codes for areas of study most commonly associated with school degrees or certificates. These values will be used for major and minor degrees.
(JPN) Define Faculty Table JPN Page	FACULTY_TABLE_JPN	(JPN) Define faculties and associate sub-faculties and a major category with them.

Understanding Education-Related Information and Profiles

If you want to include school type, school, major, minor, or Japanese faculty or sub-faculty codes in profiles, add the appropriate property to content sections in your profile types. These are the properties that are associated with the education tables:

- SCHOOL_TYPE
- SCHOOL_CODE
- SCHOOL_DESCR
- MAJOR_CODE
- MAJOR_DESCR
- JPM_MINOR_CD
- MINOR_DESCR
- FACULTY_CODE (for Japan)
- FACULTY_DESCR (for Japan)
- SUBFACULTY_CODE (for Japan)
- SUBFACULTY_DESCR (for Japan)

The delivered PERSON profile type is configured to enable you to record employees' education information. The **Education** tab in this profile type has content sections for School Education, Degrees, and Areas of Study that use the information in the education tables.

The descriptions you enter in the education tables will appear in the education-related profile pages as display only when you enter the school, major, minor, faculty, or sub-faculty codes on the page.

Related Topics

- PeopleSoft Human Resources Manage Profiles: Profile Type Properties
- PeopleSoft Human Resources Manage Profiles: Understanding Profile Management

Schools Page

Use the Schools page (SCHOOL_TABLE) to define codes for specific schools.

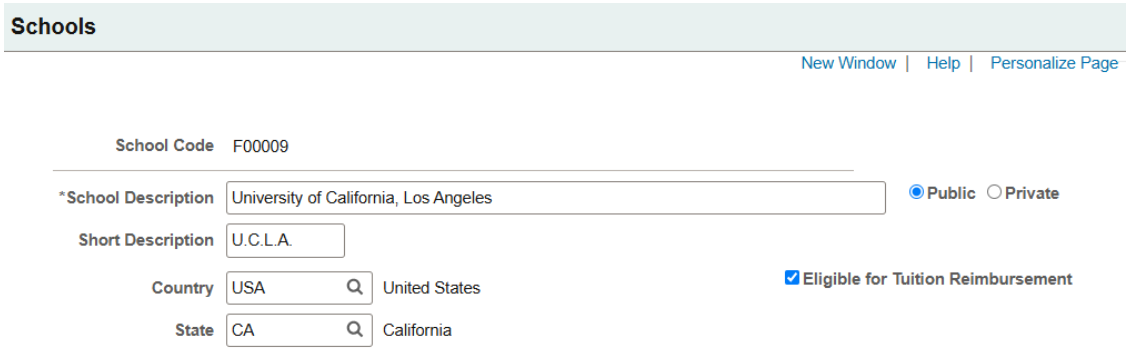
The school codes that you enter here are also available for tracking similar information either in Employee Data or in Training pages.

Navigation:

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Set Up HCM, and then **Common Definitions**, and then **School Information**, and then **Schools**, and then **Schools**

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



Field or Control	Description
School Description	Enter up to 100 characters as a description of the school. When you enter a school code in the profile pages, this value is shown as display only.
Public and **Private**	Select to indicate whether the school is a public school or privately-funded.
Country	Select the country code for the school. The country codes are stored in the Country Table. Depending on the country that you select, the system displays an associated field for defining the area of the country in which the school is located, such as **State, Province, Community, Department**, or **Country.**
Eligible for Tuition Reimbursement	Select to indicate that tuition for this institution is reimbursable by your organization. This defines which schools will be available for selection when creating a tuition request on the PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Tuition Reimbursement (Details) Page. For more information on tuition reimbursement functionality, see PeopleSoft Human Resources Administer Training and Tuition Reimbursement: Setting Up and Processing Tuition Reimbursements.

(AUS) Australia

Field or Control	Description
Institute Type	Select an institute type for an Australian school.

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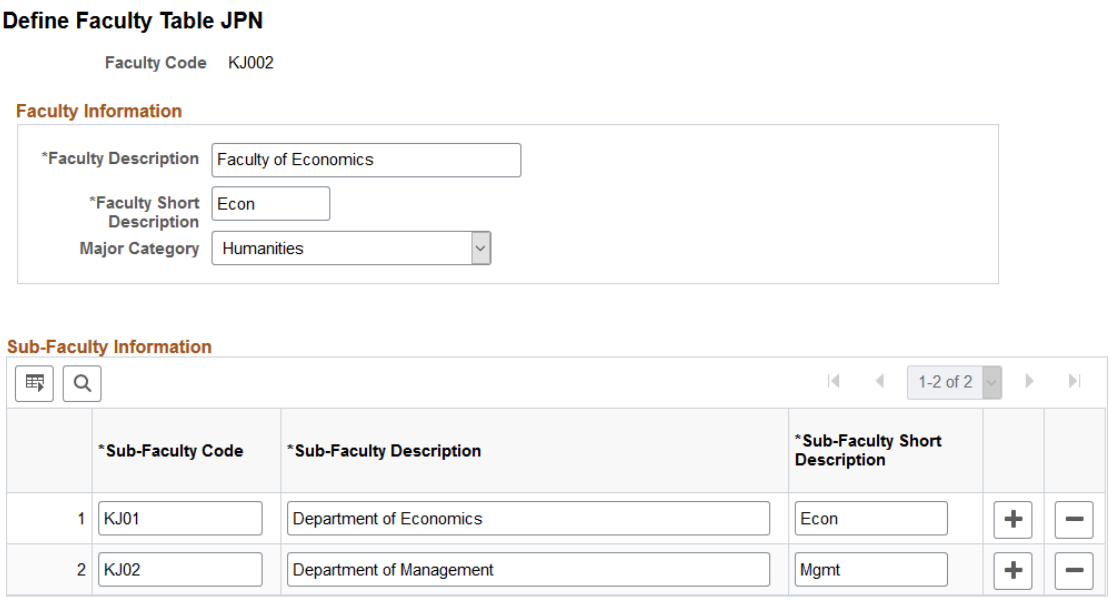
(JPN) Define Faculty Table JPN Page

Use the Define Faculty Table JPN page (FACULTY_TABLE_JPN) to define faculties and associate sub-faculties and a major category with them.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **School Information**, and then **Define Faculty Table JPN**, and then **Define Faculty Table JPN**

This example illustrates the fields and controls on the Define Faculty Table JPN page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Faculty Description	Enter a description of the faculty. When you enter a faculty or sub-faculty code in the profile pages, the system enters this text in the **Description** field as display only.
Major Category	Select a major category value. The value that you select here is the default major category wherever you select this faculty on a profile. You can also override the default.
Sub-Faculty Code	Enter a code for the sub-faculty. You can enter multiple sub-faculties. Only sub-faculties that you enter for this faculty can be selected wherever you select the faculty on a profile.

Configuring Transaction Summary

The fluid user Interface allows users and administrators to quickly create or update transaction requests using an activity guide process. These guided processes contain a summary page as a last step. This transaction summary page displays the proposed changes made by the user

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along with the current existing data, helping users review the changes before submission. Administrators can use the Configure Transaction Summary pages to identify other fields that your organization may also want to display on the summary page, even when no changes were made to the field.

To set up transaction summary page information, use the Configure Transaction Summary (HRTS_CONFIG_SUMM) component.

This topic discusses how to configure transaction summary for a component.

Pages Used to Configure Transaction Summary

Page Name	Definition Name	Usage
Configure Summary Fields Page	HRTS_CONFIGURE	Configure the fields that need appear on summary pages.
Map to Portal Registry Page	HRTS_EVENT_MAPPING	Select the portal registries to which this configuration applies

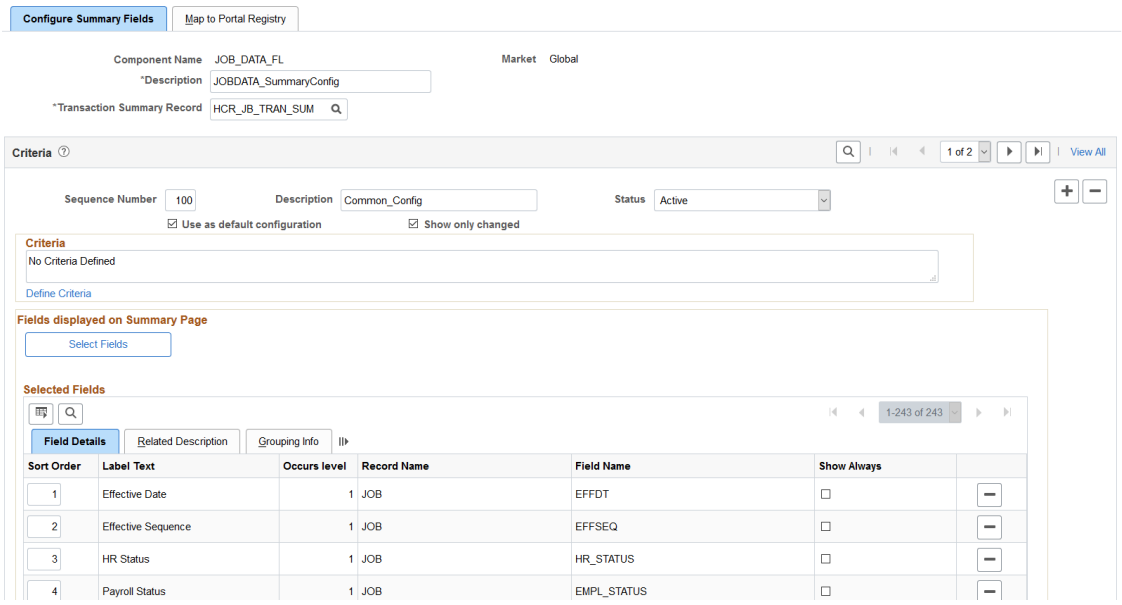
Configure Summary Fields Page

Use the Configure Summary Fields page (HRTS_CONFIGURE) to configure the fields that need appear on summary pages.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Transaction Summary**, and then **Configure Transaction Summary**, and then **Configure Summary Fields**

This example illustrates the fields and controls on the Configure Summary Fields page.



Select the Add an new row button to configure multiple configurations for the component. The system applies criteria in sequential order beginning with sequence number 1 until the criteria

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for the page is satisfied. Once a criteria is satisfied, that configuration is used and later sequence numbers and configurations are not applied.

Field or Control	Description
Transaction Summary Record	Select the record to which the summary should be saved. The Transaction Summary engine uses the record specified here to save summary information. **Note:** The prompt for the record only displays the record with the transaction Summary Sub record (HRTS_SUMM_SBR). The structure of this record should have All the key fields for component or transaction and transaction summary sub record.
Use as default configuration	Select this check box to identify one configuration as the default configuration. If no specific configuration is defined, this default configuration will be used to display the summary data.
Show Only Changed	Select this 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.
Select Fields	Click this button to open the Select Fields page in a modal window. This modal window lists all the visible pages in the selected component and the fields corresponding to each page. Select the fields that needs to be added in the transaction summary page. **Note:** Related record fields and invisible fields are excluded.

Selected Fields: Field Details Tab

This section lists the fields that will be tracked for changes and will be displayed in the summary page of the component being configured. You can add further configurations to these fields.

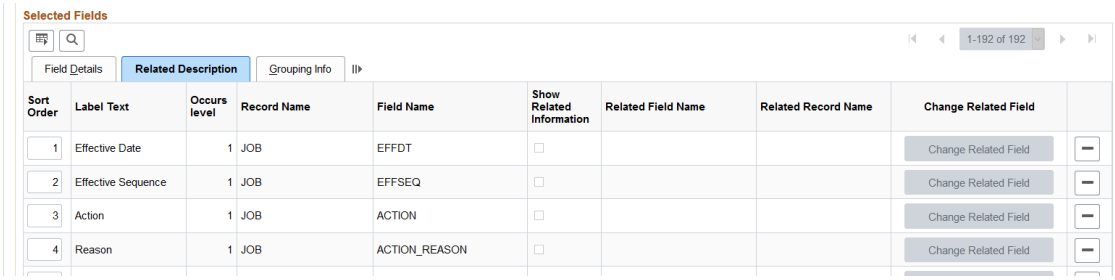
Field or Control	Description
Sort order	Enter the order in which the fields should be displayed. When saved, the order number values will be updated to form a continuous sequence.
Show Always	Select this check box to have the transaction summary page show this field, regardless if there were changes or not.

Selected Fields: Related Description Tab

Use this section to configure which fields to be displayed as the related fields.

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This example illustrates the fields and controls on the Configure Summary Fields page, showing the Related Description tab.

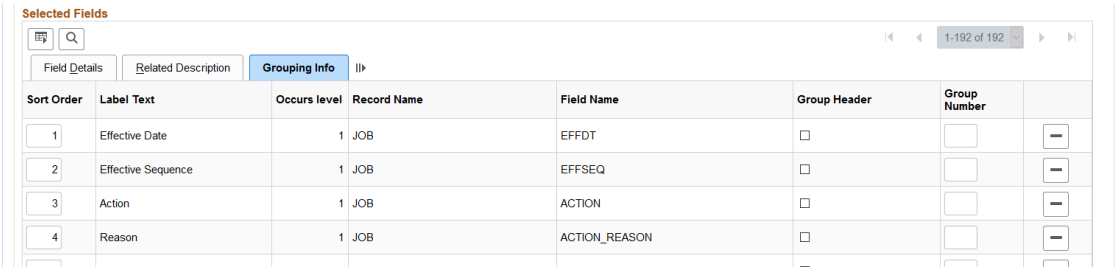


Field or Control	Description
Show Related Information	The check box is available only for fields which have an associated related display field in the page definition in Application Designer. Select this check box if you want to display the related information along with the field in summary page.
Change Related Field	This button is enabled only if you select the **Show Related Information** check box. Click this button to open the Change Related Field window. Use this button to change the related display field populated by default when the **Show Related Information** check box is selected.

Selected Fields: Grouping Info Tab

Use this section to group fields as a header for group. For example, consider that you want to group Field A, Field B, and Field C and make Field A the group header. In this case, select the Group Header check box for Field A, then enter *1* as the Group Number. Put the same number for all the fields which you wish to include in the group.

This example illustrates the fields and controls on the Configure Summary Fields page, showing the Grouping Info tab.



Field or Control	Description
Group Header	Select this check box to identify one of the key fields as the header field and associate it with a unique group number. This is used to distinguish rows from one another.

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Field or Control	Description
Group Number	Enter the group number to group fields in a grid together. All fields from the grid should have the same group number. **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.

Use the **Group Header** and **Group Number** fields on the Grouping Info tab only when configuring fields from the grid. Transaction summary uses this to group fields for the grid together by row.

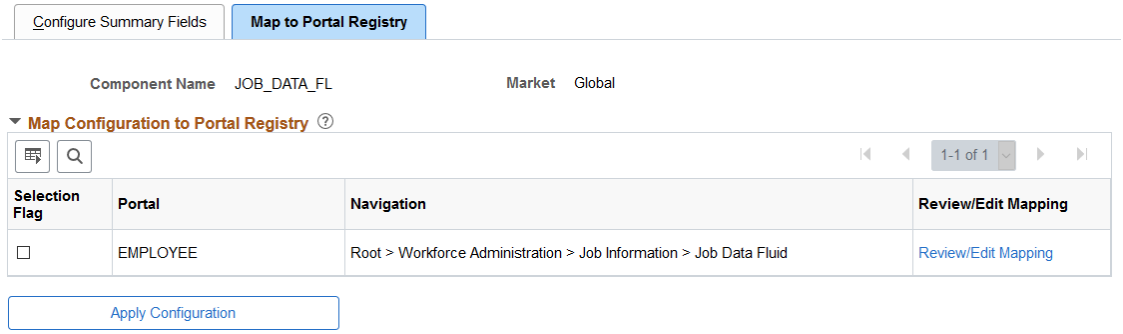
Map to Portal Registry Page

Use the Map to Portal Registry page (HRTS_EVENT_MAPPING) to select the portal registries to which this configuration applies.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Transaction Summary**, and then **Configure Transaction Summary**, and then **Map to Portal Registry**

This example illustrates the fields and controls on the Map to Portal Registry page.



Field or Control	Description
Review/Edit Mapping and **Apply Configuration** button	This link appears after the mapping is applied by selecting the **Apply Configuration** button. Select the link to review the Event Mapping generated by the push button.

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Working with Recognitions

Understanding Recognition

The Recognition feature enables users to provide kudos to acknowledge the achievements and accomplishments of individuals in the organization.

In addition to words of appreciation to celebrate ones' success, recognitions can also be used to send constructive feedback to provide guidance and help individuals grow. Users can give, receive, and interact with recognitions (or posts) at any time in a central location using fluid tiles.

Managers use the Team Recognition Tile to:

- Create recognitions for team members.
- View recognitions that were received by team members.
- View recognitions that they sent to team members.

Similarly, employees use the Recognition Tile to:

- Create recognitions for peers and people in the organization.
- View recognitions that were received by people in the organization.

  Employees can decide if they want to view recognitions of their peers or everyone through user preferences.
- View recognitions that they received.
- View recognitions that they sent to others.

Users can like, comment, or do both on recognitions. From the **More Actions** menu, they can edit or remove recognitions or comments that they added, as well as report content that is deemed inappropriate.

Administrators are notified after users report recognitions or comments in the system. They can access the **Reported Posts and Comments** tile on the Recognition and Digital Badges Dashboard to review reported content and take appropriate actions.

Video: Image Highlights, PeopleSoft HCM Update Image 48: Employee Recognition

Video: Image Highlights, PeopleSoft HCM Update Image 50: Recognition Integration with Performance Management

Recognitions in Performance Management

Recognition integrates with Performance Management to provide access to employee recognitions from performance documents.

During the evaluation phase, managers and employees have the option to view recognitions that the employees received as input when they update manager evaluations or self-evaluations. They can also select recognitions to be included and displayed directly in documents.

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For more information, see PeopleSoft ePerformance: Understanding Recognitions in Performance Documents and View Recognitions Page.

Recognition Notifications

The system sends out notifications to Recognition users when:

- Posts are sent.

  Notifications sent to: post recipients and recipient's direct managers (if post visibility is set to *Employee and Manager*). If new recipients are added to posts in edit mode, only they will be notified when posts are updated.

- Comments are sent.

  Notifications sent to: post recipients.

- Posts or comments are reported and require review.

  Notifications sent to: administrators.

- Posts or comments are reported.

  Notifications sent to: post authors.

Notification texts for recognitions are maintained in Text Catalog (object owner ID = *HHR*, sub ID = *HRRC*). Text IDs ending in *-SBJ* and *-BDY* are for email subject and body messages, *-PHN* for phone text messages, and *-PSH* for in-app alerts.

Users can select a notification entry or link to access the corresponding content on the View Recognitions Page (for manager and employee) or Reported Posts and Comments Page (for administrator).

Managed in Notification Composer, users may be able to personalize how (for example, email, in-app, and text) they receive these notifications from **My Preferences**, and then **Notifications**, as configured by the system administrator.

See Also Enterprise Components: Understanding Notification Composer.

Setting Up Recognition

This topic provides the Recognition setup overview, lists delivered user roles, and discusses how to set up the Recognition feature.

> **Note**
>
> The terms *recognition* and *post* are used interchangeably in this documentation.

Pages Used to Set Up Recognition

Page Name	Definition Name	Usage
Recognition Impact Type Page	HRRC_IMPACT_TYPE	Define impact types for recognitions.
Recognition Category Type Page	HRRC_CATEGORY_TYPE	Define category types for recognitions.

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Page Name	Definition Name	Usage
Configure Recognition Groups Page	HRRC_REC_GROUP	Define the group of people for whom recognitions can be created or viewed.
Fluid Popup Menu Setup Page	EP_PMENU_SETUP	Configure actions for the **More Actions** menu in recognitions.
Recognition Preferences Page	HRRC_USER_PREF_FL	(Employee) Personalize whose recognitions to view in Employee Self-Service.

Setting Up Recognition

Here are the high-level steps for setting up the Recognition feature:

1. Ensure that the **Enable Recognition** check box is selected on the HCM Options Page of the Installation Table.

   Review and select the **Enable Comments** check box to allow comments in posts if needed.

2. Select the **Allow to View Recognitions** check box on the PeopleSoft ePerformance: Template Definition - Process Page to allow managers and employees to view recognitions on performance documents if needed.

   To enable recognitions to be added and displayed inline on performance documents, add the **Recognition Summary** section type to the document template definition. For more information about the setup of this functionality, refer to the PeopleSoft ePerformance: Understanding Recognitions in Performance Documents topic.

3. Define recognition impacts and categories on the Recognition Impact Type Page and Recognition Category Type Page if needed.

   When you create a recognition, you have the option to classify it by specifying a category and an impact.

4. Define a custom group on the Configure Recognition Groups Page if needed.

   It's possible to set up a custom group to restrict the group of people who can see recognitions and for whom recognitions are created. Custom group setup impacts the following:

   - When an employee creates a new recognition and is looking for a person to recognize from across the organization, the person search is filtered based on the custom group setup.
   - When a user creates a new recognition and indicates that *Everyone* can see the recognition, the definition of *Everyone* is based on the custom group, if such setup exists.
   - When a user indicates in their recognition preferences that they want to see recognitions for *Everyone* in Employee Self-Service, the definition of *Everyone* is based on the custom group, if such setup exists.

   A custom group can be useful when your organization has a large number of employees and the volume of recognitions runs high. It refines the recognitions that a user can create or view to those that are relevant to the user, for example, viewing recognitions for people who belong to the same business unit as the user.

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5. The system delivers actions that are accessible through the **More Actions** menu. The menu is located in multiple places of a recognition to provide relevant user actions where they are needed.

   See Also Fluid Popup Menu Setup Page.

Delivered User Roles for Recognition

The system delivers these roles for the Recognition functionality.

- Recognition Administrator
- Recognition Manager
- Recognition Employee

Recognition and Digital Badges Tile

Use the Recognition and Digital Badges tile (HC_HRRC_ADMIN_FL_GBL_LINK) to access the Recognition and Digital Badges dashboard for a consolidated view of tasks for setting up and managing recognitions and digital badges as an administrator.

Navigation:

The **Recognition and Digital Badges** tile can be found:

- In the **Org Planning and Development** section of the Manage People and Jobs Dashboard of the PeopleSoft landing page.
- On the Talent Administrator Homepage.

This example illustrates the Recognition and Digital Badges tile.



See Recognition and Digital Badges Dashboard.

Recognition and Digital Badges Dashboard

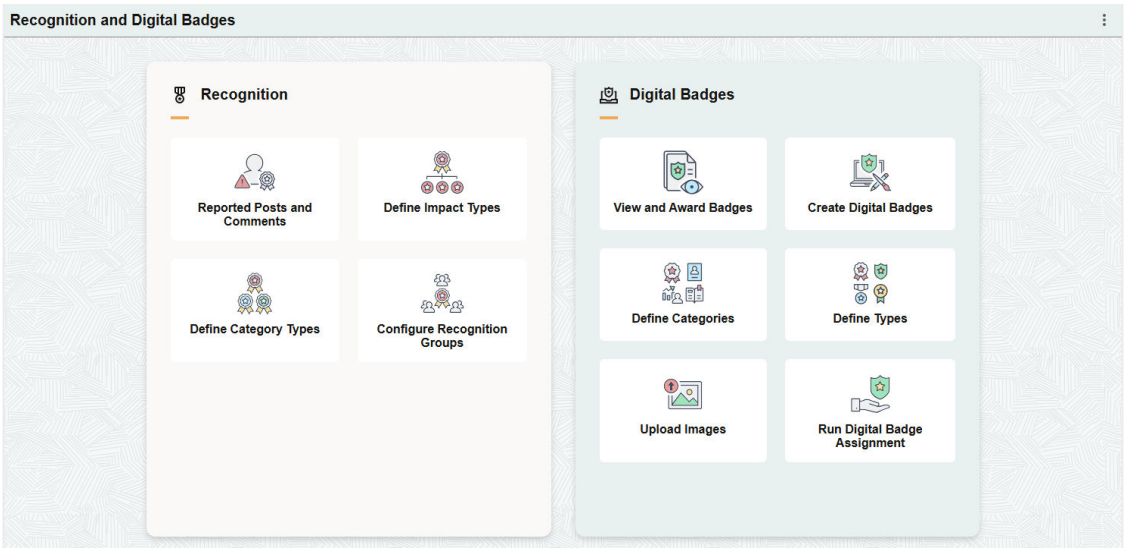
Use the Recognition and Digital Badges dashboard (HC_HRRC_ADMIN_FL_GBL) to access tiles to set up and managing recognitions and digital badges as an administrator.

Navigation:

Select the **Recognition and Digital Badges** tile.

This example illustrates the Recognition and Digital Badges dashboard.

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The **Recognition and Digital Badges** dashboard includes the following sections and tiles.

- **Recognition** section

  This section appears when the Recognition feature is enabled.

  - Reported Posts and Comments Tile (see Reported Posts and Comments Page)
  - Define Impact Types Tile (see Recognition Impact Type Page)
  - Define Category Types Tile (see Recognition Category Type Page)
  - Configure Recognition Groups Tile (see Configure Recognition Groups Page)

- **Digital Badges** section
  This section appears when the Digital Badges feature is enabled.

  - View and Award Badges Tile
  - Create Digital Badges Tile
  - Define Categories Tile
  - Define Types Tile
  - Upload Images Tile
  - Run Digital Badge Assignment Tile

Recognition Impact Type Page

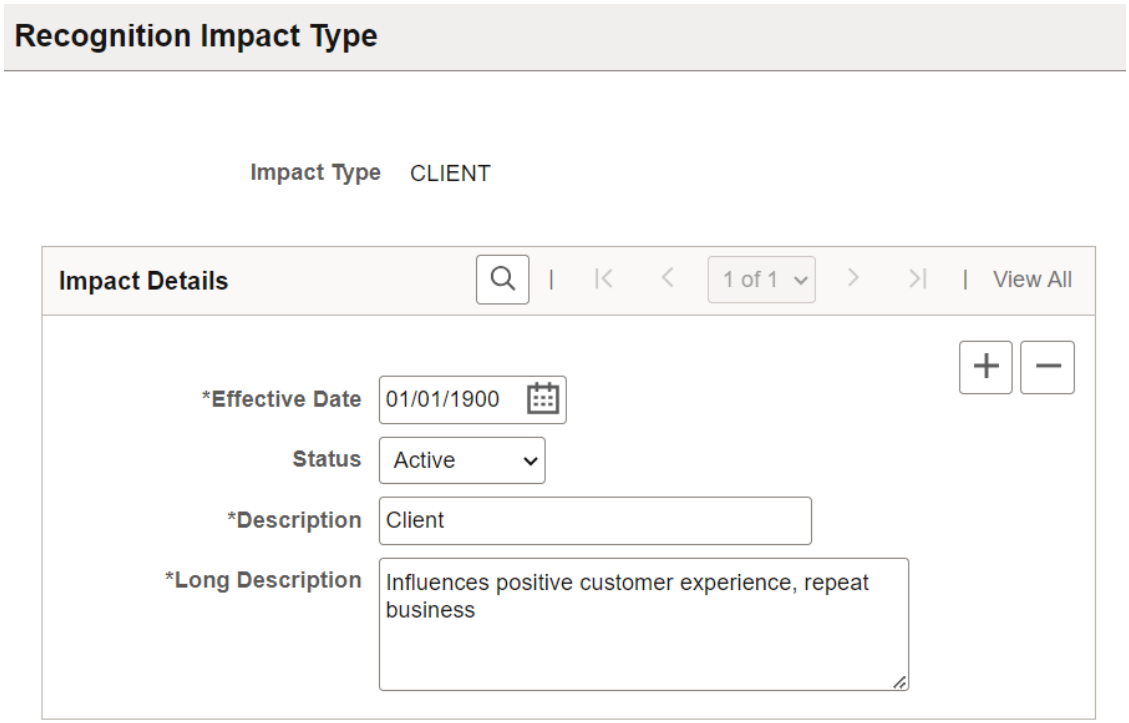
Use the Recognition Impact Type page (HRRC_IMPACT_TYPE) to define impact types for recognitions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Recognition**, and then **Recognition Impact Type**, and then **Recognition Impact Type**

This example illustrates the fields and controls on the Recognition Impact Type page.

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Impact types are associated with categories in the setup to provide further classification for categories. When creating a recognition, you can specify a category, impact, or both, to specify the nature of the recognition.

Related Topics

- New Recognition Page
  Use the New Recognition page (HRRC_CREATE_RCG_FL) to create new recognitions.

Recognition Category Type Page

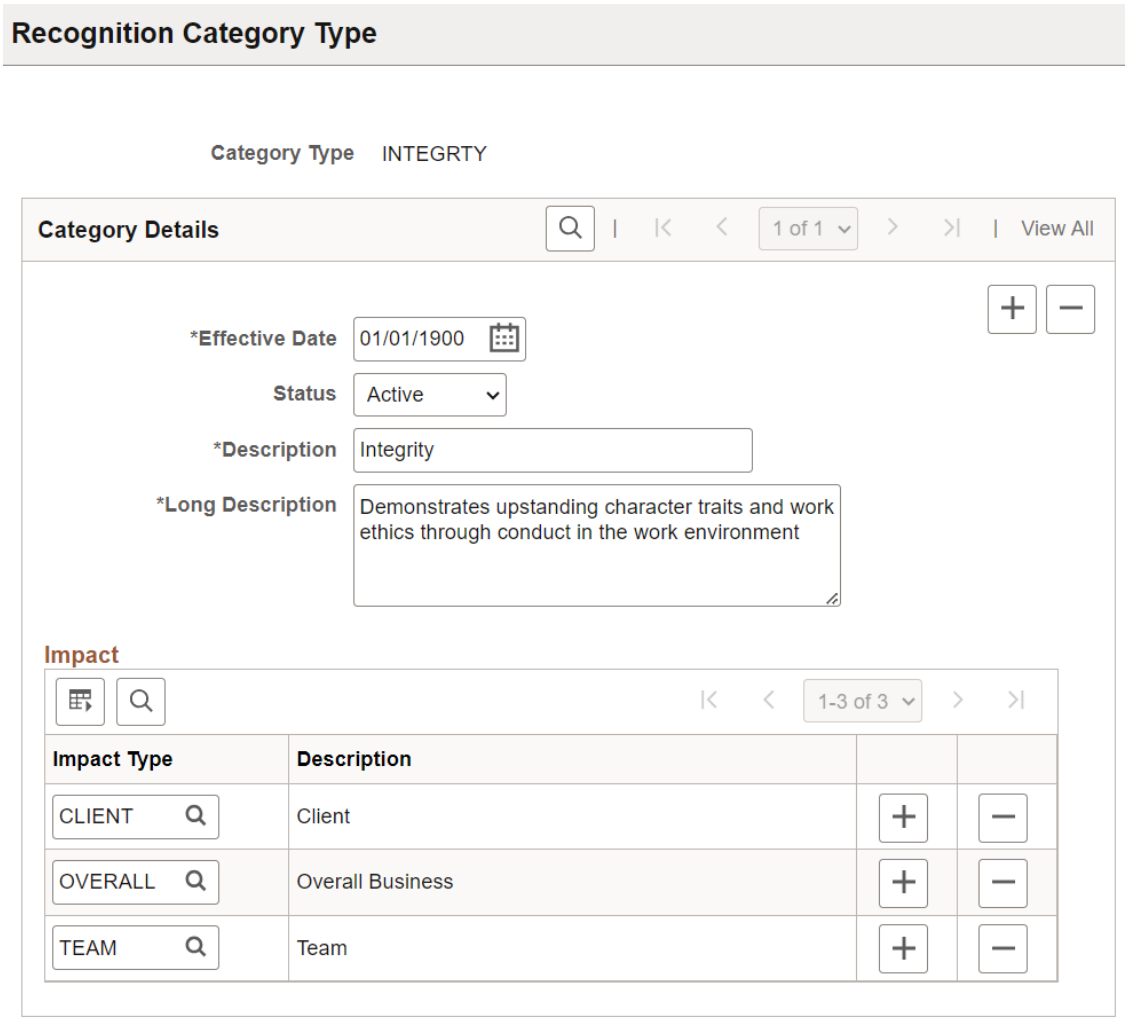
Use the Recognition Category Type page (HRRC_CATEGORY_TYPE) to define category types for recognitions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Recognition**, and then **Recognition Category Type**, and then **Recognition Category Type**

This example illustrates the fields and controls on the Recognition Category Type page.

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Field or Control	Description
Impact	Specify one or more impact type values for the category. Impact type values that have the same or greater effective dates than the category are available for selection. When you specify a category for a recognition in the creation process, the system lists the associated impact values that you can select for the recognition.

Related Topics

- New Recognition Page
  Use the New Recognition page (HRRC_CREATE_RCG_FL) to create new recognitions.

Configure Recognition Groups Page

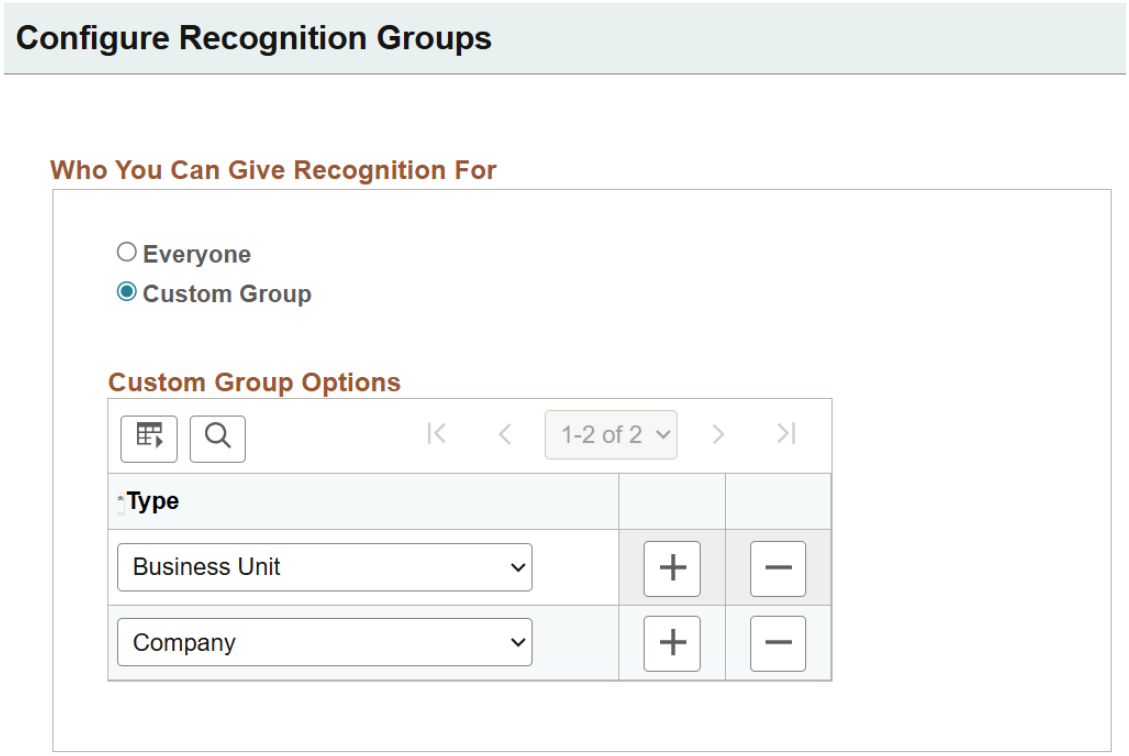
Use the Configure Recognition Groups page (HRRC_REC_GROUP) to define the group of people for whom recognitions can be created or viewed.

Navigation:

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Set Up HCM, and then **Product Related**, and then **Recognition**, and then **Configure Recognition Groups**, and then **Configure Recognition Groups**

This example illustrates the fields and controls on the Configure Recognition Groups page.



Who You Can Give Recognition For

Field or Control	Description
Everyone	Select to allow recognitions to be created or viewed for everyone in the organization. This is the default value.
Custom Group	Select to allow recognitions to be created or viewed for a custom group of people in the organization. Define criteria for the group in the **Custom Group Options** section that appears.

Custom Group Options

This section appears if *Customer Group* is selected.

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Field or Control	Description
Type	Select one or more types used to determine who to include in the custom group. Values are: *Business Unit* *Company* *Department* *Location* For example, if *Company* is selected, the system allows users to create or view recognitions for individuals who are in the same company as them, based on the logged-in user's latest effective date in Job Data.

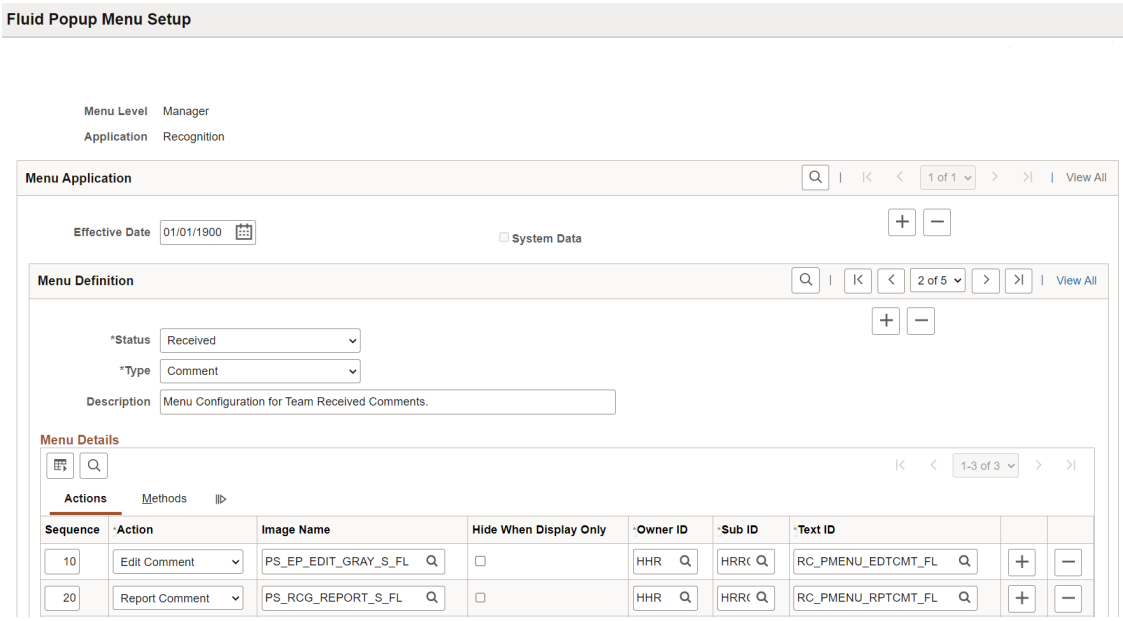
Fluid Popup Menu Setup Page

Use the Fluid Popup Menu Setup page (EP_PMENU_SETUP) to configure actions for the **More Actions** menu in recognitions.

Navigation:

Set Up HCM, and then **Product Related**, and then **Recognition**, and then **Fluid Popup Menu Setup**, and then **Fluid Popup Menu Setup**

This example illustrates the fields and controls on the Fluid Popup Menu Setup page.



This page captures the configuration of actions that are available in the **More Actions** menus for the Recognition feature (application: *Recognition*). It is cloned from the same page (EP_PMENU_SETUP) in Fluid ePerformance, and is used within the HRRC_PMENU_SETUP component created for Recognition.

The **More Actions** menu supports pop-up actions when users:

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- Look up people for whom recognitions are created.
- Interact with recognitions.
- Interact with comments.

See Also PeopleSoft ePerformance: Fluid Popup Menu Setup Page.

Recognition Preferences Page

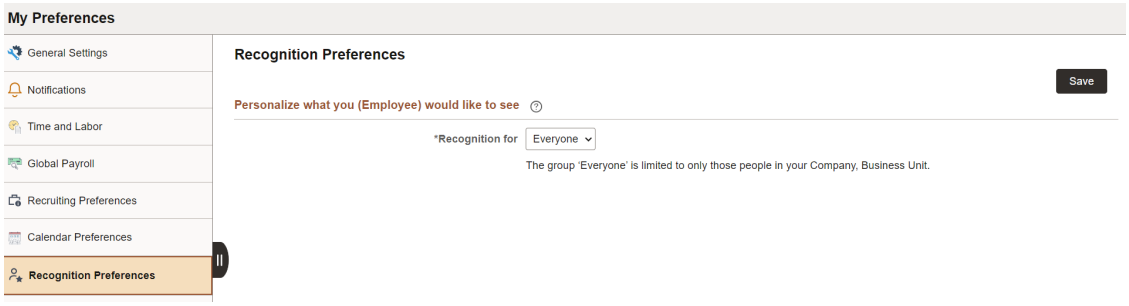
(Employee) Use the Recognition Preferences page (HRRC_USER_PREF_FL) to personalize whose recognitions to view in Employee Self-Service.

Navigation:

My Preferences

Select **Recognition Preferences** from the left pane on the My Preferences page.

This example illustrates the fields and controls on the Recognition Preferences page.



Field or Control	Description
Recognition for	Select whose recognitions you want to see on the first page that appears when you access the Recognition Tile in Employee Self-Service, *My Peers* or *Everyone*. The system uses this selection as the label of the first page. *Everyone:* Select to view recognitions of individuals who are in your organization or custom group, based on the setup on the Configure Recognition Groups Page. If a custom group was previously defined by the administrator, and you select *Everyone* on the Recognition Preferences page, the system displays a message here with the corresponding custom group information. *My Peers:* Select to view recognitions of individuals who report to the same manager (or managers if you have multiple jobs) as you.

Working with Recognitions

This topic provides an overview of the Recognition card structure, where recognitions are displayed, and lists pages used to work with recognitions.

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Pages Used to Work with Recognitions

Page Name	Definition Name	Usage
Recognition Tile	-	Access Recognition pages and view recognitions that you received, sent, and have access to as the employee.
Recognition - <Everyone or My Peers> Page	HRRC_ESS_RECOG_FL	View and interact with recognitions of others as the employee.
Recognition - Received Page	HRRC_ESS_RECOG_FL	View and interact with recognitions that you received as the employee.
Recognition - Sent Page	HRRC_ESS_RECOG_FL	View and interact with recognitions that you sent to others as the employee.
Team Recognition Tile	-	Access Team Recognition pages and view recognitions for your team members.
Team Recognition - Received Page	HRRC_MSS_RECOG_FL	Select team members for whom you want to view recognitions.
Recognitions Received Page	HRRC_MSS_RECVD_FL	View and interact with recognitions received by selected team members.
Team Recognition - Sent Page	HRRC_MSS_RECOG_FL	View and interact with recognitions that you sent to team members as the manager.
New Recognition Page	HRRC_CREATE_RCG_FL	Create new recognitions.
Profile Information Page	HR_EE_PROFILE_FL	View the profile details of the selected employee.
<Received By or Sent To> Page	HRRC_GRP_MEMB_SCF	View the list of recipients for group recognitions.
Liked By Page	HRRC_LIKE_SCF	View the list of people who have liked the post.
All Comments Page	HRRC_COMMENTS_SCF	View all comments entered for the post.
Privacy Settings Page	HRRC_VISIBILTY_SCF	Modify the visibility setting of recognitions.
Edit Post Page	HRRC_CREATE_RCG_FL	Update posts.
Report Post Page	HRRC_RPT_POST_SCF	Report inappropriate posts.
Report Comment Page	HRRC_RPT_CMT_SCF	Report inappropriate post comments.
View Recognitions Page	HRRC_VIEW_RECOG_FL	Access employee recognitions from performance documents or notifications.

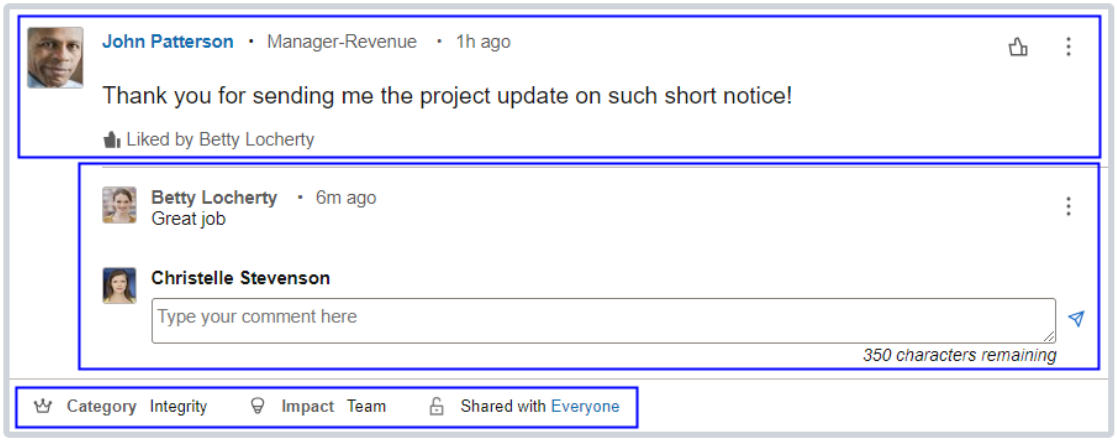
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Understanding the Recognition Card Structure

The Recognition feature adopts a simple card structure that enables users to interact with recognitions easily.

> **Note**
>
> The terms *recognition* and *post* are used interchangeably in this documentation.

This example displays the layout of a post.



The top part of the post:

- Displays photo (if used) and information of either the author or the recipient, depending on the page from which you're viewing the post.
- Displays post text and time of creation.
- Provides actions that you can take on posts, such as like and edit post.

You may view comments posted by others, add comments and take other actions, if comments are enabled on the HCM Options Page. If comments are not enabled, the comment portion of the post is not shown.

The footer of the post displays the category, impact and visibility information of the post if applicable.

Time Display of Posts and Comments

Each post or comment shows the time stamp of when it was created.

The system uses these rules to determine how to display time for posts and comments:

Time Display	Description
Just Now	If post or comment was created less than 1 minute ago.

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Time Display	Description
"X"m ago	If post or comment was created X minutes ago, where X is equal to or greater than 1 but less than 60.
"X"h ago	If post or comment was created X hours ago, where X is equal to or greater than 1 but less than 12.
Today	If post or comment was created equal to or more than 12 hours but less than 24 hours ago.
Yesterday	If post or comment was created equal to or more than 24 hours but less than 48 hours ago.
MM/DD/YYYY	If post or comment was created equal to or more than 48 hours ago.

Where Posts Are Displayed

A post can be visible to users in one or more places based on factors such as the visibility setting of the post, user preferences, and sometimes the role of the user (employee or manager).

> **Note**
>
> Posts and comments of *inactive* employees are not displayed.

These examples describe where users can access posts that were created for them, by them, and for others.

Example 1: Post Created By Manager For Direct Report

In this example, the manager created a post for a direct report from the **Team Recognition** tile:

Author	Created From	Recipient	Visible To
Manager	Manager Self-Service	Direct report	Everyone

The post is visible to users in these places:

- The author can:
  - Select the recipient's row on the Team Recognition - Received page, and view the post on the Recognitions Received page.
  - View the post on the Team Recognition - Sent page.
  - View the post on the Recognition - Sent page.
- The recipient can view the post on the Recognition - Received page.
- Any user with the *Everyone* recognition preference (or in the same custom group as the recipient if custom group is defined) can view the post on the Recognition - Everyone page.

  Any user with the *My Peers* recognition preference and is a peer of the recipient can view the post on the Recognition - My Peers page.

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Example 2: Post Created By Employee For Another Employee

In this example, the employee created a post for another employee in a different reporting structure from the **Recognition** tile:

Author	Created From	Recipient	Visible To
Employee	Employee Self-Service	Employee	Employee and Manager

The post is visible to users in these places:

- The recipient's direct manager can select the recipient's row on the Team Recognition - Received page, and view the post on the Recognitions Received page.
- The author can view the post on the Recognition - Sent page.
- The recipient can view the post on the Recognition - Received page.

Other users cannot see this post because it is set to be visible to the employee and manager only.

Example 3 - Post Created By Employee With Manager Role For Another Employee

As a continuation of example 2, the employee, who was also a manager, went on to create a post for another employee from the **Recognition** tile. The recipient happened to be an indirect report.

Author	Created From	Recipient	Visible To
Employee with manager role	Employee Self-Service	Indirect report	Everyone

The post is visible to users in these places:

- The recipient's direct manager can select the recipient's row on the Team Recognition - Received page, and view the post on the Recognitions Received page.

  The author, who is an indirect manager of the recipient, can also use this navigation to view the post, if Direct Reports configuration includes indirect reports.
- The author can also:
  - View the post on the Team Recognition - Sent page.
  - View the post on the Recognition - Sent page.
- The recipient can view the post on the Recognition - Received page.
- Any user with the *Everyone* recognition preference (or in the same custom group as the recipient if custom group is defined) can view the post on the Recognition - Everyone page.

  Any user with the *My Peers* recognition preference who is a peer of the recipient can view the post on the Recognition - My Peers page.

Recognition Tile

(Employee) Use the Recognition tile to access Recognition pages and view recognitions that you received, sent, and have access to as the employee.

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Navigation:

The **Recognition** tile is located on the Employee Self-Service home page by default.

This example illustrates the Recognition tile.



The Recognition tile displays the count of new posts created for the employee, if applicable.

Recognition - <Everyone or My Peers> Page

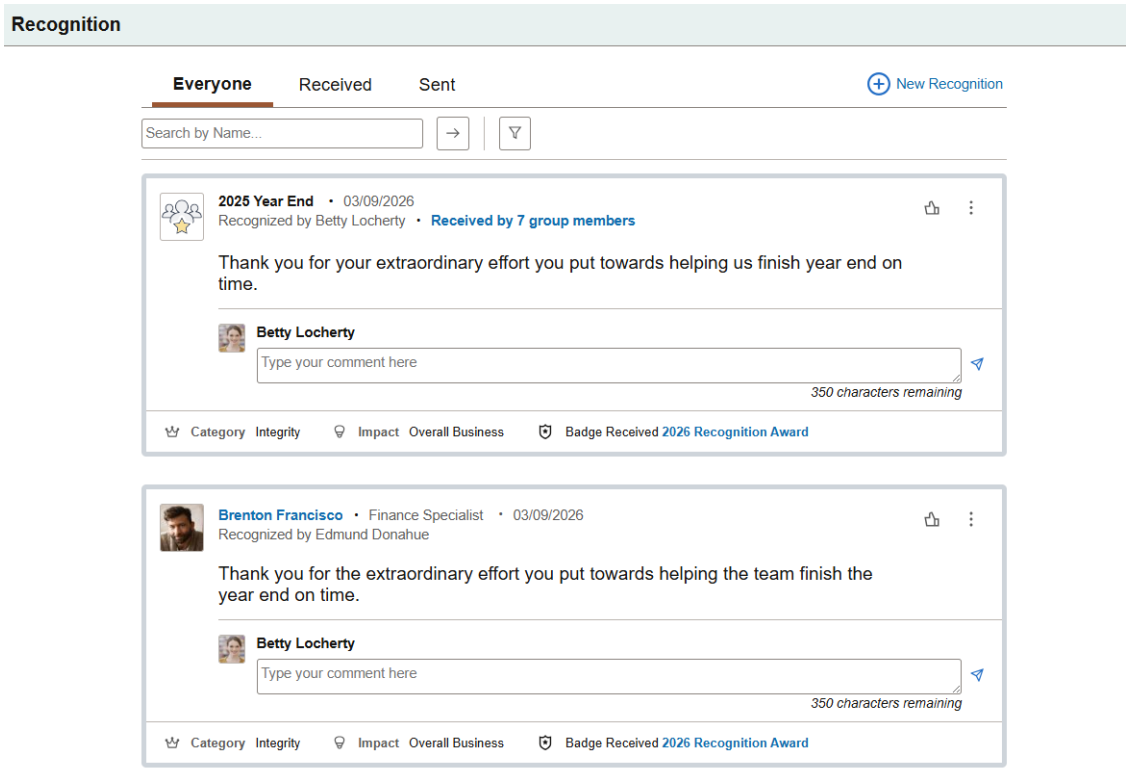
(Employee) Use the Recognition - <Everyone or My Peers> page (HRRC_ESS_RECOG_FL) to view and interact with recognitions of others as the employee.

Navigation:

Select the Recognition Tile.

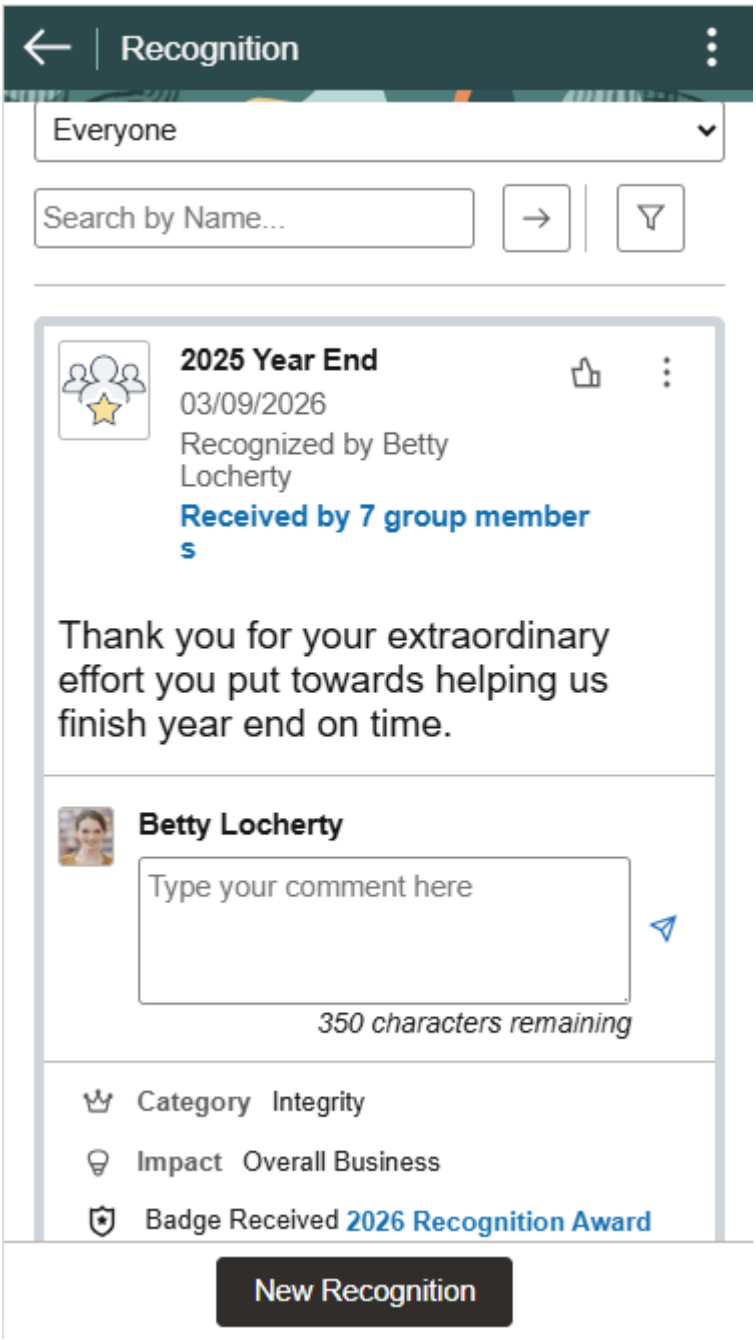
This example illustrates the fields and controls on the Recognition - <Everyone or My Peers> page.

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This illustrates the Recognition - <Everyone or My Peers> page for the smartphone.

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Note

The selected preference of the logged-in user on the Recognition Preferences Page determines the title and content of this page, *Everyone* or *My Peers*.

Field or Control	Description
New Recognition	Select to create recognitions for employees. See New Recognition Page.

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Field or Control	Description
<search field>	Enter a partial or whole employee name to search for posts.
	Select to perform the search. If the number of posts in the search results exceeds 100, only the first 100 posts are displayed. Use the filter to refine your search.
	Select to specify date filter values on the Filters modal page to further refine the search results for posts. Values are: *Custom.* When selected, specify the From and To dates of the custom period. *Last 14 Days* *Last 30 Days* The Filter icon is displayed in a highlighted color if a filter is applied.

Post

Field or Control	Description
<Employee Name link>	Displays the name of the employee, who is: • The post recipient if viewed from the <Everyone or My Peers> page or a Sent page, or • The post author if viewed from a Received page. Select the link to view the profile information of the employee on the Profile Information Page.
Received by <number > group members or **Sent to <number > group members**	Select to view the list of recipients for the post on the <Received By or Sent To> Page. This link appears if you are viewing a post that has more than one recipient.
 or 	Select to like the post or undo liking of the post.
	Valid actions may include: *Edit Post:* available if you are the author of the post. See Edit Post Page. *Delete Post:* available if you are the author of the post. *Report Post:* available if you are *not* the author of the post. See Report Post Page.

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Field or Control	Description
	The system displays the *Liked by* message when the post is liked by its viewers. The message structure changes slightly based on the number of likes. Some examples include: *Liked by You, <employee name1>, <employee name2>* if the post is liked by up to 5 people, including you. *Like by You and [number] others* if the post is liked by more than 5 people total, including you. *[number] Likes* if the post is liked by more than 5 people, excluding you. See Liked By Page.
	Select to perform an action on a comment if comments are supported. Valid actions may include: *Edit Comment:* available if you are the author of the comment. Select to update the comment on the Edit Comment modal page (HRRC_EDIT_CMNT_SCF) that appears. *Delete Comment:* available if you are the author of the comment. *Report Comment:* available if you are *not* the author of the comment. See Report Comment Page.
See All Comments	Select to view the comments entered for the post on the All Comments Page. From the modal page, you can: • Edit or delete your own comments. • Report other people's comments. • Delete other people's comments (if you are the author of the post). This link appears for posts with more than one comment.
<Comment field>	Enter post comment. This field appears if the post is set to allow comments on the New Recognition Page.
	Select to save and send the post comment.
Category, Impact, and **Shared with**	Displays the category, impact and visibility information specified for the post, if applicable. The author or recipient of the post can use the **Shared with** link to change who has visibility to the post on the Privacy Settings Page. This link appears on the Received page for the recipient, and the Sent page for the author. Visibility information is not displayed on the Recognition - <Everyone or My Peers> Page.
Badge Received	Displays the link for the digital badge received as part of the recognition. Select the link to view badge information on the Badge Details Page.

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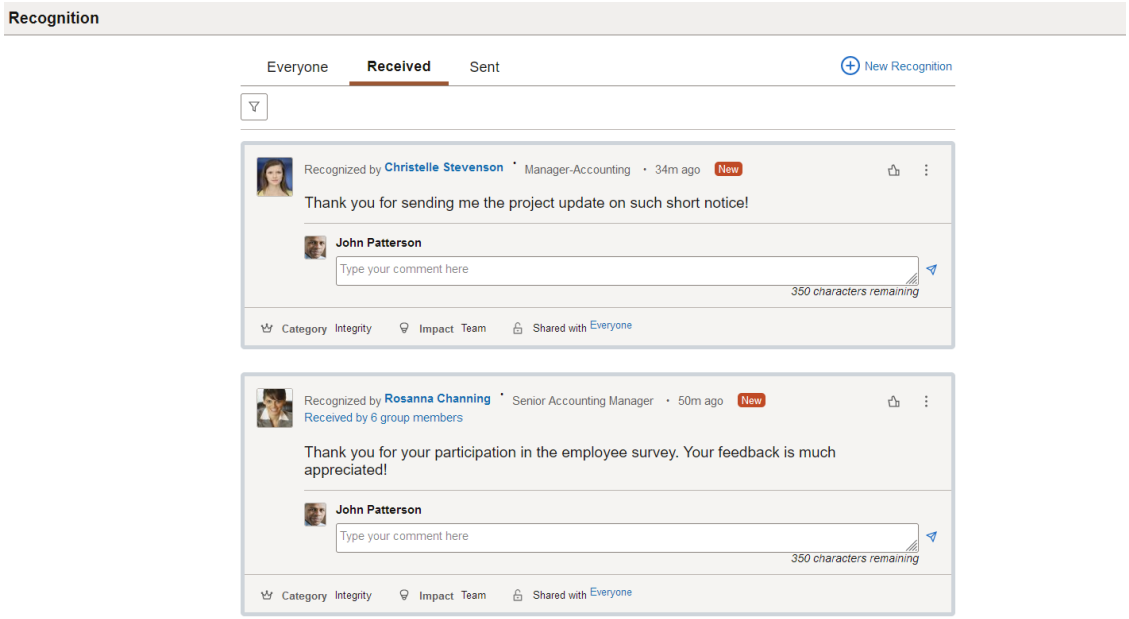
Recognition - Received Page

(Employee) Use the Recognition - Received page (HRRC_ESS_RECOG_FL) to view and interact with recognitions that you received as the employee.

Navigation:

Select the Recognition Tile, then the **Received** page.

This example illustrates the fields and controls on the Recognition - Received page.



Field or Control	Description
	Select to specify date filter values on the Filters modal page to further refine the search results for posts. Values are: *Custom.* When selected, specify the From and To dates of the custom period. *Last 14 Days* *Last 30 Days* The Filter icon is displayed in a highlighted color if a filter is applied.

Posts look and behave similarly on recognition pages where they are displayed. Refer to the **Post** section of the Recognition - <Everyone or My Peers> Page for descriptions of shared fields and controls.

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Field or Control	Description
New	Indicates that the post is newly created. This icon appears if the recipient has not viewed the post. The recipient can also view the count of new posts they received on the **Recognition** tile. **Note:** If a new post is visible to everyone and the employee views it for the first time on the Recognition - <Everyone or My Peers> Page, the system considers the post viewed. Now, if the employee leaves without accessing the Received page and come back to the **Recognition** tile later, the new post count and New icon will no longer be shown. In addition to the icon display, a new post also has a colored background.

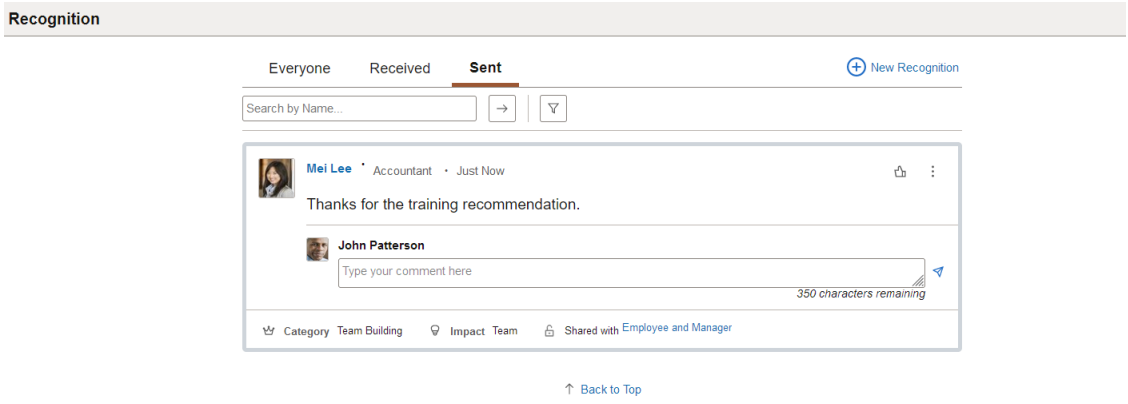
Recognition - Sent Page

(Employee) Use the Recognition - Sent page (HRRC_ESS_RECOG_FL) to view and interact with recognitions that you sent to others as the employee.

Navigation:

Select the Recognition Tile, then the **Sent** page.

This example illustrates the fields and controls on the Recognition - Sent page.



Field or Control	Description
New Recognition	Select to create recognitions for employees. See New Recognition Page.
<search field>	Enter a partial or whole employee name to search for posts.
→	Select to perform the search. If the number of posts in the search results exceeds 100, only the first 100 posts are displayed. Use the filter to refine your search.

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Field or Control	Description
	Select to specify date filter values on the Filters modal page to further refine the search results for posts. Values are: *Custom.* When selected, specify the From and To dates of the custom period. *Last 14 Days* *Last 30 Days* The Filter icon is displayed in a highlighted color if a filter is applied.

Posts look and behave similarly on pages where they are displayed. Refer to the **Post** section of the Recognition - <Everyone or My Peers> Page for descriptions of shared fields and controls.

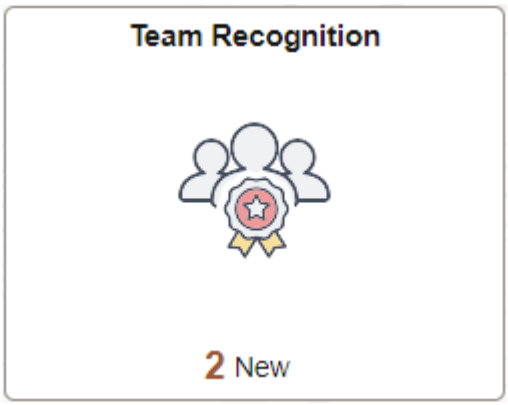
Team Recognition Tile

(Manager) Use the Team Recognition tile to access Team Recognition pages and view recognitions for your team members.

Navigation:

The **Team Recognition** tile is located on the Manager Self-Service home page by default.

This example illustrates the Team Recognition tile.



The Team Recognition tile displays the count of new posts created for team members, if applicable.

Team Recognition - Received Page

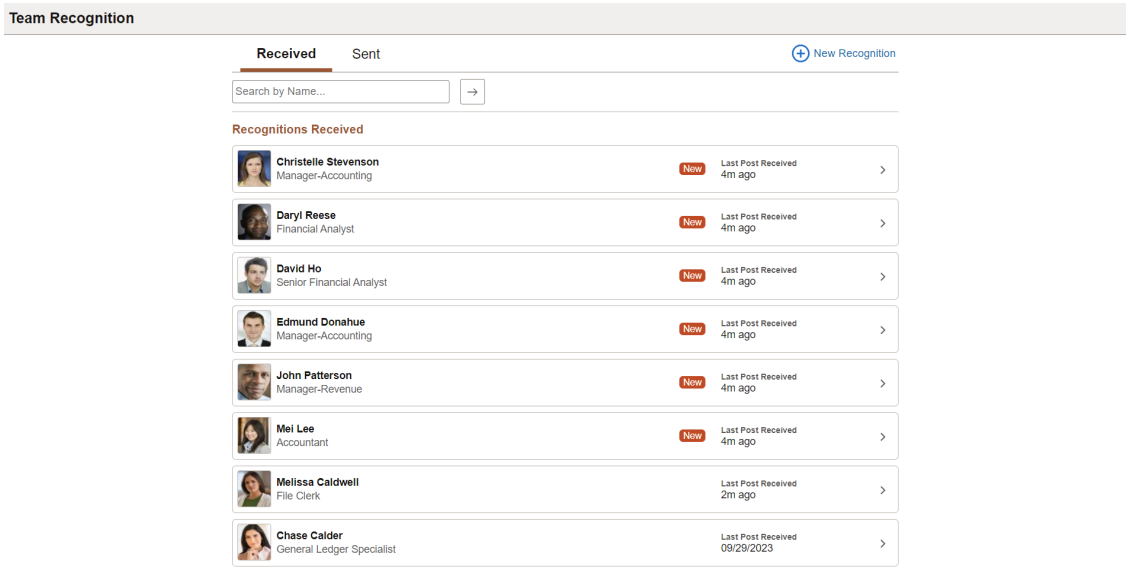
(Manager) Use the Team Recognition - Received page (HRRC_MSS_RECOG_FL) to select team members for whom you want to view recognitions.

Navigation:

Select the Team Recognition Tile.

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This example illustrates the Team Recognition - Received page that displays a list of employees in your team who received recognitions.



Field or Control	Description
New Recognition	Select to create recognitions for employees. See New Recognition Page.
<search field>	Enter a partial (using % as the wildcard character) or whole employee name to search for matching employee rows.
	Select to perform the search.

Employee List

This page displays a list of your team members, which include direct reports (and indirect reports if enabled in the Direct Reports configuration for HRRC_MSS_RECOG_FL) who have received recognitions. Each employee is displayed as a card. Information presented on the card includes:

- Employee's name, photo (if used), and job title.
- Time when the latest post was received.
- The **New** icon if the employee has a newly received post that hasn't been viewed.

Select an employee row to open the Recognitions Received Page for the employee where you can view and interact with recognitions created for them.

Recognitions Received Page

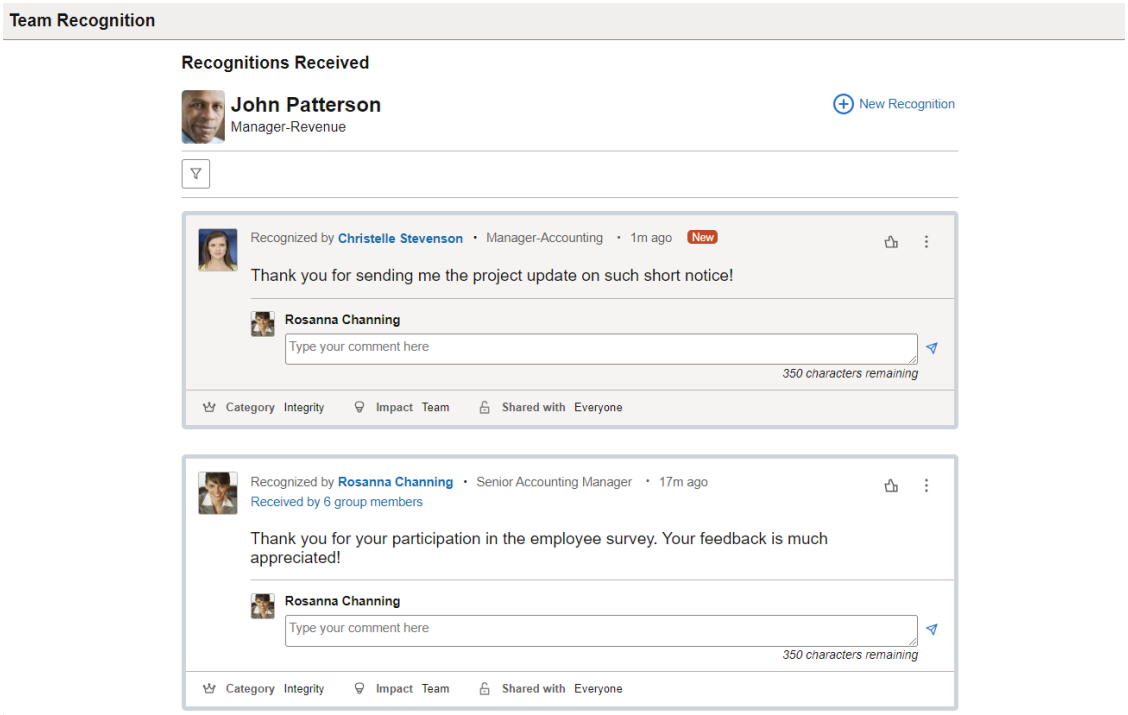
(Manager) Use the Recognitions Received page (HRRC_MSS_RECVD_FL) to view and interact with recognitions received by selected team members.

Navigation:

Select a team member from the Team Recognition - Received Page.

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This example illustrates the fields and controls on the Recognitions Received page.



The header area of this page displays the photo (if used), name and job title of the selected team member.

Field or Control	Description
New Recognition	Select to create recognitions for employees. See New Recognition Page.
	Select to specify date filter values on the Filters modal page to further refine the search results for posts. Values are: *Custom.* When selected, specify the From and To dates of the custom period. *Last 14 Days* *Last 30 Days* The Filter icon is displayed in a highlighted color if a filter is applied.

Posts look and behave similarly on pages where they are displayed. Refer to the **Post** section of the Recognition - <Everyone or My Peers> Page for descriptions of shared fields and controls.

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Field or Control	Description
New	Indicates that the post is newly created. This icon appears if the post is set to be visible to *Everyone* or *Employee and Manager*, and the direct manager has not viewed the post. The manager can also view the count of new posts their team members received on the **Team Recognition** tile. In addition to the icon display, a new post also has a colored background.

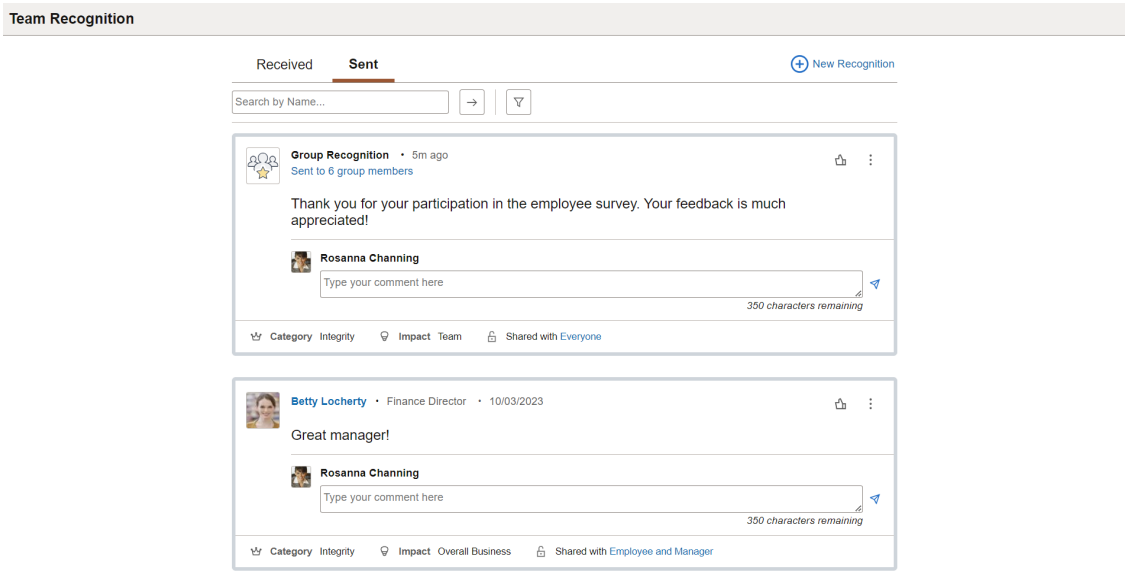
Team Recognition - Sent Page

(Manager) Use the Team Recognition - Sent page (HRRC_MSS_RECOG_FL) to view and interact with recognitions that you sent to team members as the manager.

Navigation:

Select the Team Recognition Tile, then the **Sent** page.

This example illustrates the fields and controls on the Team Recognition - Sent page.



Field or Control	Description
<search field>	Enter a partial or whole employee name to search for posts.
→	Select to perform the search. If the number of posts in the search results exceeds 100, only the first 100 posts are displayed. Use the filter to refine your search.

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Field or Control	Description
	Select to specify date filter values on the Filters modal page to further refine the search results for posts. Values are: *Custom.* When selected, specify the From and To dates of the custom period. *Last 14 Days* *Last 30 Days* The Filter icon is displayed in a highlighted color if a filter is applied.

Posts look and behave similarly on pages where they are displayed. Refer to the **Post** section of the Recognition - <Everyone or My Peers> Page for descriptions of shared fields and controls.

New Recognition Page

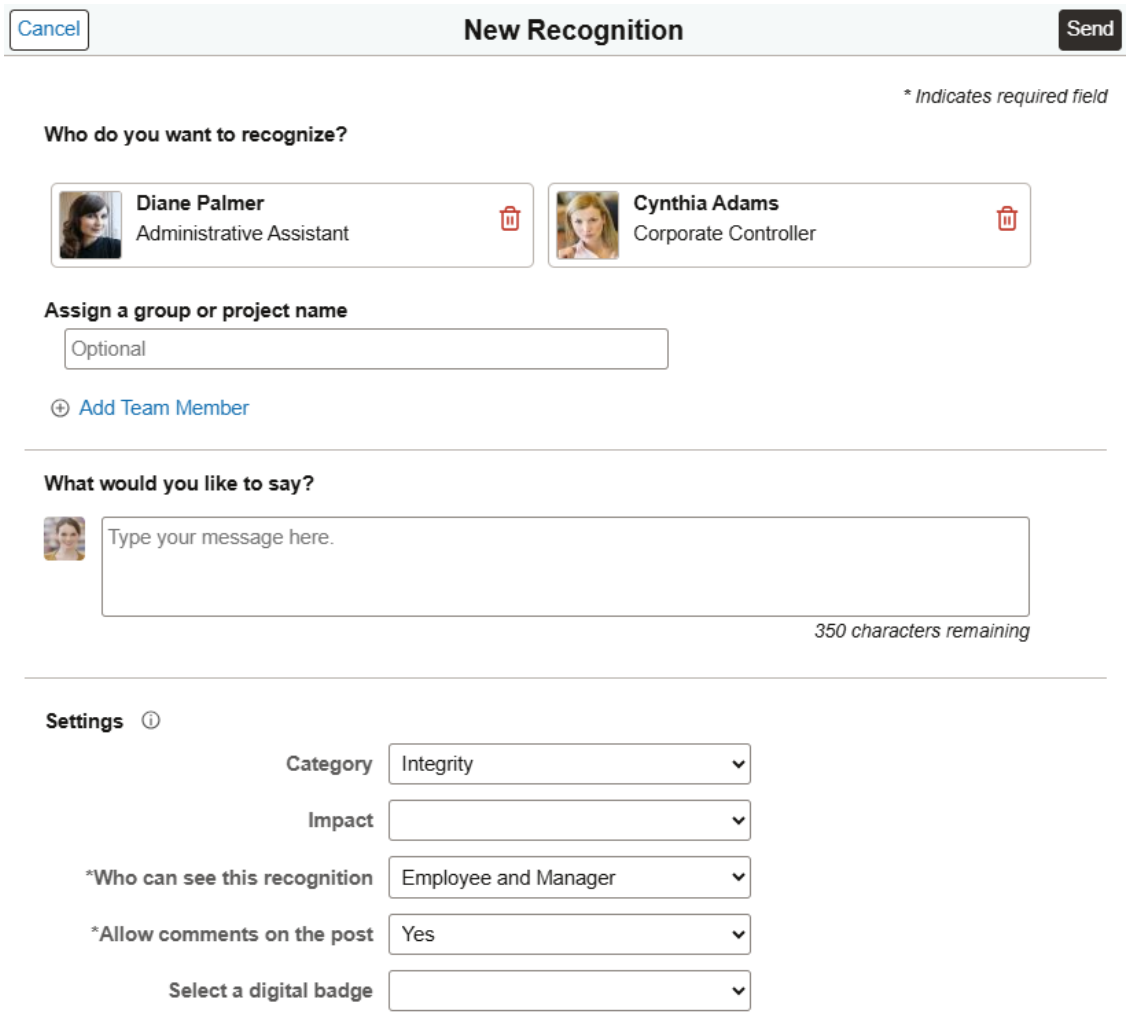
Use the New Recognition page (HRRC_CREATE_RCG_FL) to create new recognitions.

Navigation:

Select the **New Recognition** link on Team Recognition pages for managers and Recognition pages for employees.

This example illustrates the fields and controls on the New Recognition page.

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Field or Control	Description
Who do you want to recognize	Add recipients by selecting: (Manager) The **Add Team Member** link. (Employee) The **Find Person** link.

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Field or Control	Description
Add Team Member	(Manager) Select to add one or more individuals (who report to you) for whom the recognition is created. **Note:** If you create a new recognition from the Recognitions Received Page, which shows all posts pertaining to a selected team member, the system automatically defaults the selected team member as the recipient of the new recognition. To add other people to the new recognition, you must first delete the selected team member. The **Add Team Member** link reappears for you to select team members for the recognition again. Indirect team members are also available for selection, if the option to allow indirect reports is enabled in the Direct Reports setup (Component name: *HRRC_CREATE_RCG_FL*). See Also Configuring Direct Reports Functionality.
Find Person	(Employee) Select to add one or more individuals for whom the recognition is created. Values are: *From My Peers:* Search from individuals with the same manager (or managers if you have multiple jobs) as you. *From Across Organization:* Search from the custom group (if one is defined on the Configure Recognition Groups Page), or the entire organization (if no custom group is defined). The **Find Person** link uses the configuration from Simple Person Search (Objective owner ID: *Human Resources* and Sub Application: *HRRC*). Contingent workers and persons of interest can be supported if enabled in the setup. See Also Configuring Person Search.
Assign a group or project name	Enter the name for the recognition that has multiple recipients, if applicable. This field appears if more than one person is selected to receive the recognition. You can enter an optional name to dedicate the recognition to a specific project or group. If a group or project name is provided, it is displayed in place of the post recipient in a group recognition, If not, the default name *Group Recognition* is used. See Also <Received By or Sent To> Page.
What would you like to say	Enter the recognition message (350 characters maximum).

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Field or Control	Description
Category	Enter a category value for the recognition. This field appears if the setup for category types exists. A category is required to select a digital badge for the recognition. See Also Recognition Category Type Page.
Impact	Enter an impact value for the recognition. This field appears if the setup for impact types exists, and becomes editable when a category is selected. See Also Recognition Impact Type Page.
Who can see this recognition	Select who can see the recognition using the **Team Recognition** or **Recognition** tile. This field is required. Values are: *Employee:* Recognition recipients. *Employee and Manager:* Recognition recipients and their managers. *Everyone:* Everyone in the defined custom group, or in the organization if no custom group is defined.
Allow comments on the post	Select whether or not to allow viewers of the recognition to add comments. This field is required. This field appears if the **Enable Comments** option is selected on the HCM Options Page. When *Yes* is selected, the system displays the comment field on the recognition. When *No* is selected, the comment field is not shown; comment is not supported. This field becomes read-only if you are editing a recognition that has comments.
Select a digital badge	Select a digital badge to give to selected individuals as part of the recognition, if desired. This field becomes editable if badges are created for the specified category and impact (specified or left blank). Only badges that match the selected category and impact exactly are available for selection.

Profile Information Page

Use the Profile Information page (HR_EE_PROFILE_FL) to view the profile details of the selected employee.

Navigation:

Select the employee name link on a recognition.

This example illustrates the fields and controls on the Profile Information page.

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Field or Control	Description
<Email address link>	Select to compose an email using the email address from your default email application.
View My Org	Select to access the hierarchical reporting structure of the selected employee on the PeopleSoft Human Resources Administer Workforce: Organization Chart Page in a new browser tab or window. This link does not display if you do not have access to Company Directory.

<Received By or Sent To> Page

Use the Received By page or Sent To page (HRRC_GRP_MEMB_SCF) to view the list of recipients for group recognitions.

Navigation:

- Select the **Received by <number> group members** link on a group recognition.
- Select the **Sent to <number> group members** link on a group recognition.

This example illustrates the fields and controls on the Received By page.

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Both **Received By** page and **Sent To** page look and function the same.

The page title is **Received By** page if you access it from a group recognition on a Received page or the Recognition - <Everyone or My Peers> page.

The page title becomes **Sent To** page if you access it from a group recognition on a Sent page.

Liked By Page

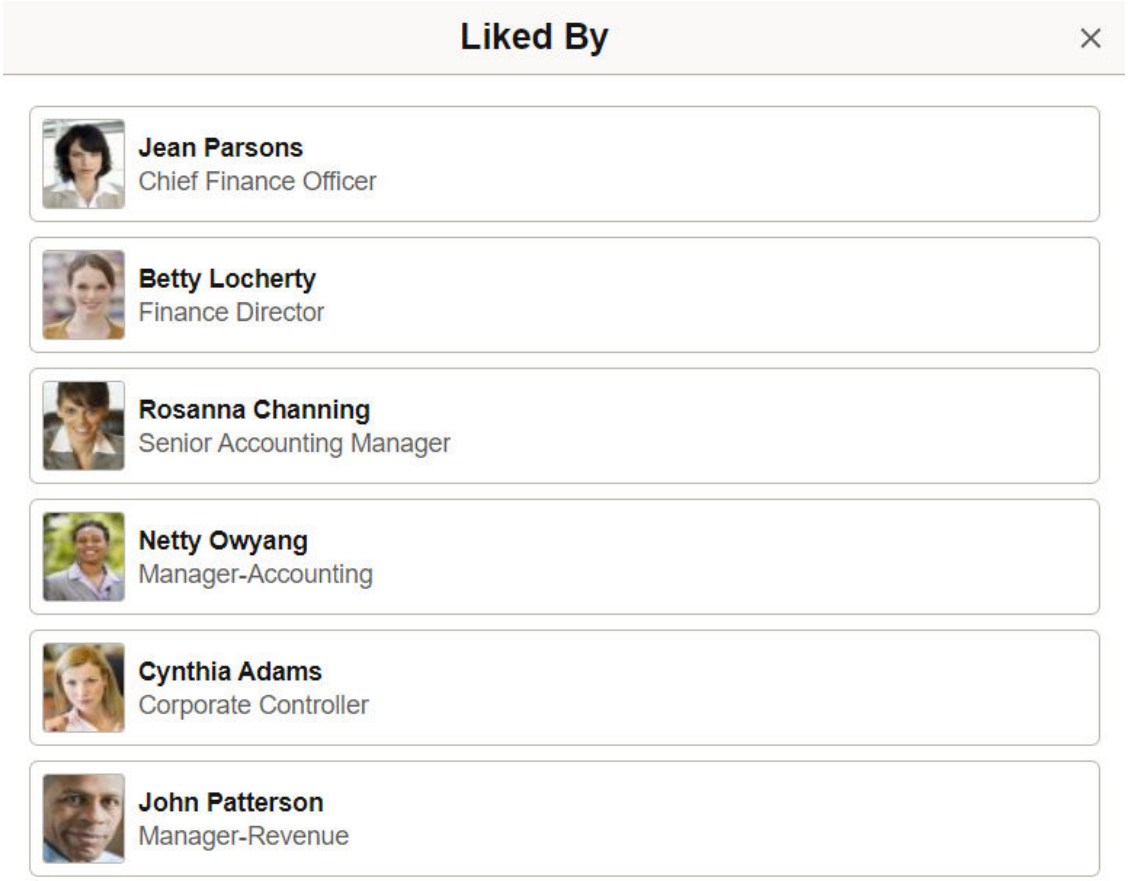
Use the Liked By page (HRRC_LIKE_SCF) to view the list of people who have liked the post.

Navigation:

Select the **Liked by You and <number> others** link or **<number> Likes** link on a recognition.

This example illustrates the fields and controls on the Liked By page.

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If a post is liked by more than 5 people, you can view their names and job titles on the Liked By page.

All Comments Page

Use the All Comments page (HRRC_COMMENTS_SCF) to view all comments entered for the post.

Navigation:

Select the **See All Comments** link on a post.

This example illustrates the fields and controls on the All Comments page.

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If a post has more than one comment, they are listed on the All Comments page in chronological descending order.

Field or Control	Description
<comment field>	Update the comment if needed. It is editable if you are the author of the comment.
	Select to delete the comment. This action is available if you are the author of the comment.
	Select to report the comment to the system administrator. This action is available to viewers, but not the author of the comment.

Privacy Settings Page

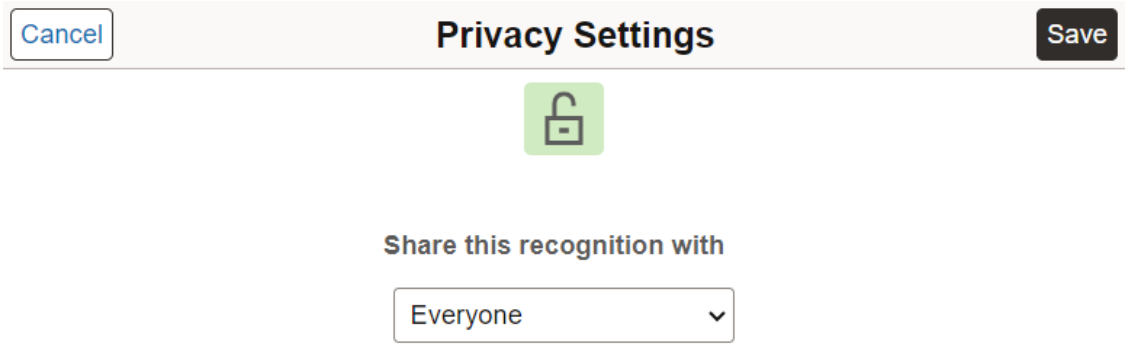
Use the Privacy Settings page (HRRC_VISIBILTY_SCF) to modify the visibility setting of recognitions.

Navigation:

Select the **Shared with** link of a recognition.

This example illustrates the fields and controls on the Privacy Settings page.

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The author or recipient of the post can update the post's visibility setting after it was created.

Field or Control	Description
Share this recognition with	Select who can view the post. Values are *Employee, Employee and Manager,* and *Everyone.*

Edit Post Page

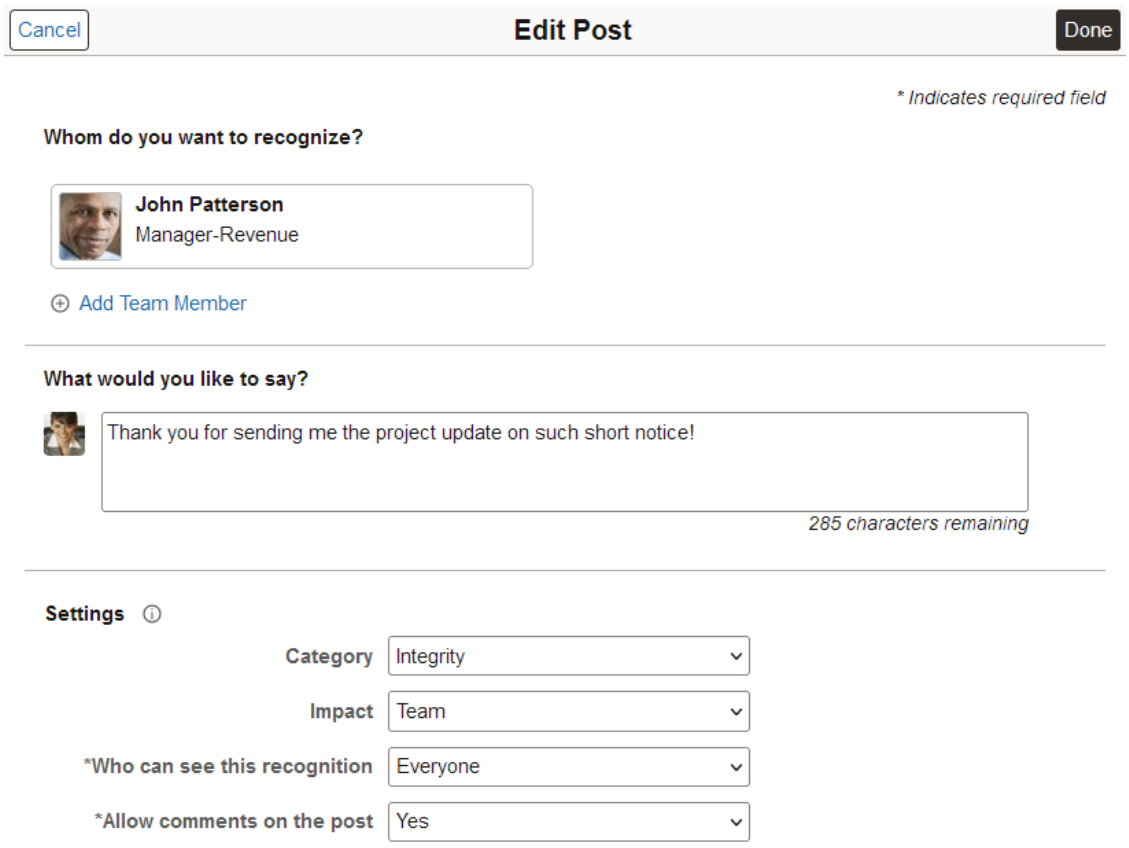
Use the Edit Post page (HRRC_CREATE_RCG_FL) to update posts.

Navigation:

Select *Edit Post* from the **More Actions** menu of a post.

This example illustrates the fields and controls on the Edit Post page.

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You can add recipients, and update the text and settings of the post if needed. However, you cannot delete existing recipients from the post.

The Edit Post page looks and functions the same as the New Recognition Page.

Report Post Page

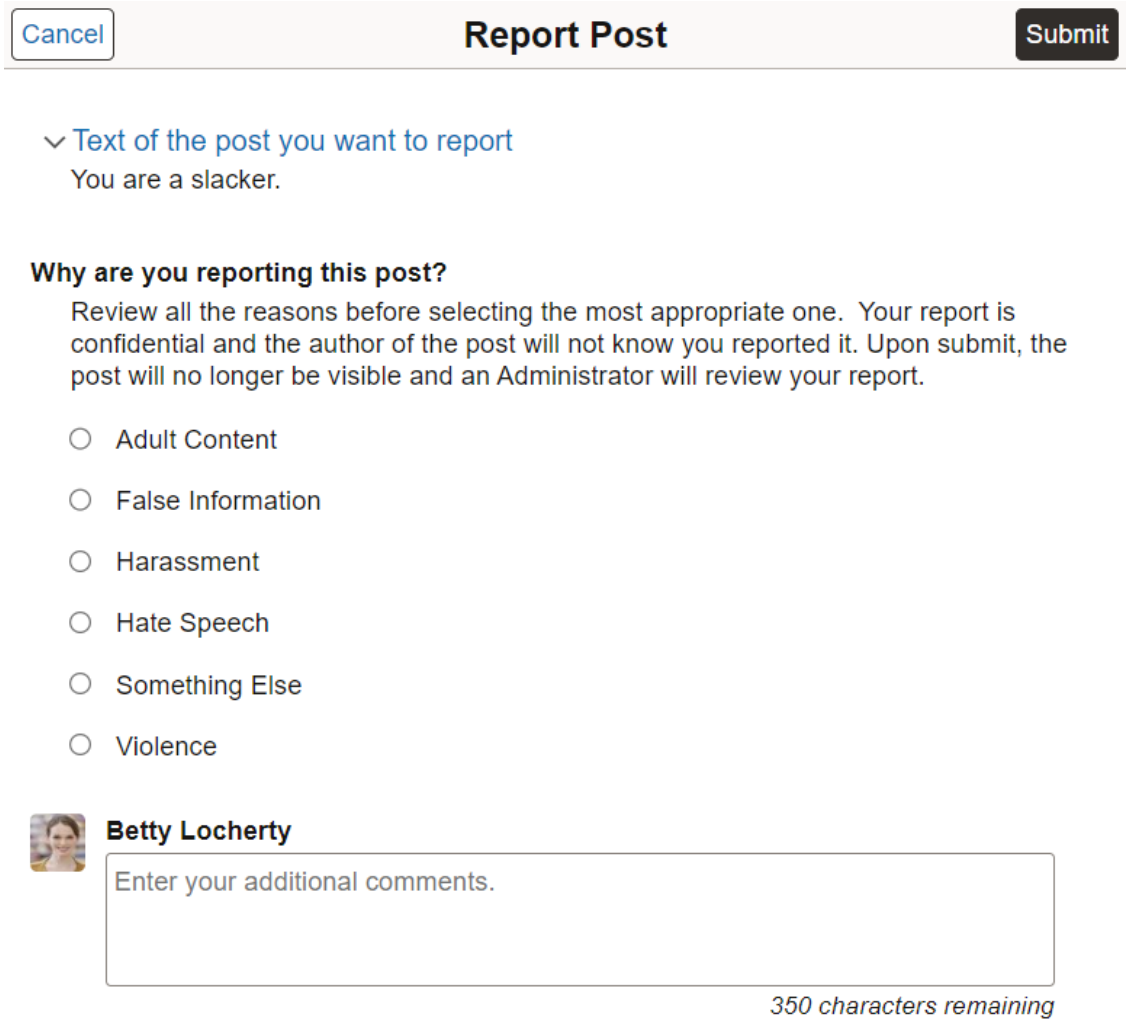
Use the Report Post page (HRRC_RPT_POST_SCF to report inappropriate posts.

Navigation:

Select *Report Post* from the **More Actions** menu of a post.

This example illustrates the fields and controls on the Report Post page.

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Reported posts are hidden until the administrator makes the decision to show them after review.

> **Note**
>
> The Report Post page is shown in read-only mode if the content you are reporting was reported by you previously.

Field or Control	Description
Text of the post you want to report	View the content of the post you are reporting in this expanded section.
Why are you reporting this post?	Select the most appropriate reason for reporting the post. This is required. The list of reasons are translate values and can be modified. The field name is *RC_REPORT_REASON*.
<comment field>	Enter any comment you may have for reporting the post.

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Field or Control	Description
Submit	Select to submit the request to the administrator for review. The reported post is hidden until the administrator makes a decision to show it as a result of the review. Administrators review reported posts and comments on the Reported Posts and Comments Page.

Report Comment Page

Use the Report Comment page (HRRC_RPT_CMT_SCF) to report inappropriate post comments.

Navigation:

Select *Report Comment* from the **More Actions** menu of a comment.

Both the Report Post Page and Report Comment page look and function the same, one for reporting posts and the other comments.

Reported comments are hidden until the administrator makes the decision to show them after review.

> **Note**
>
> The Report Comment page is shown in read-only mode if the content you are reporting was reported by you previously.

View Recognitions Page

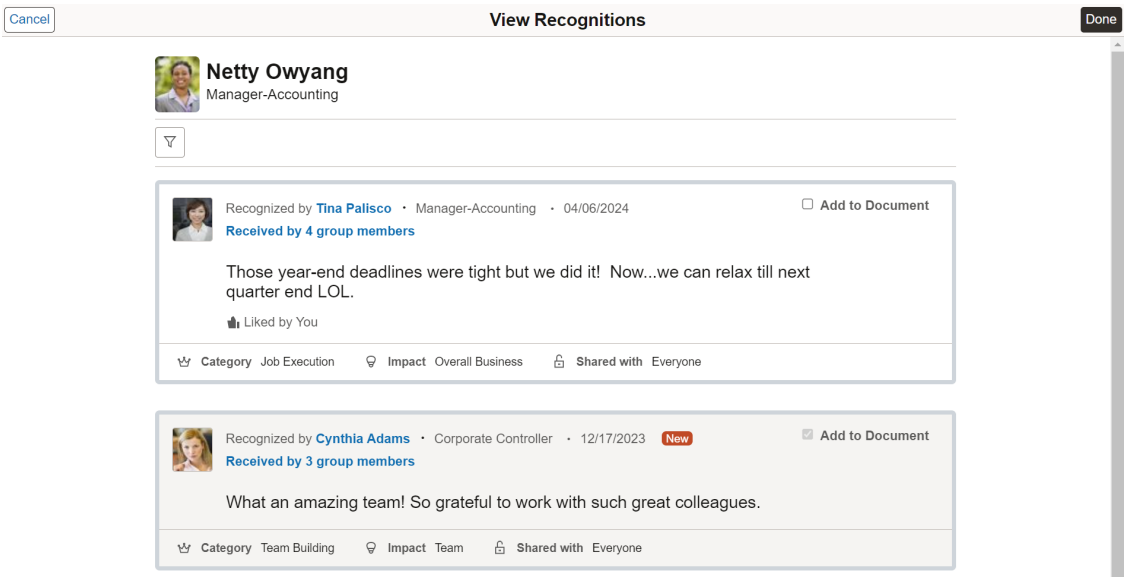
Use the View Recognitions page (HRRC_VIEW_RECOG_FL) to access employee recognitions from performance documents or notifications.

Navigation:

- Select the **View Recognitions** icon from the header area of a performance document.
- Select the notification entry of a post or comment.
- Select the **View Recognitions** link in the **Recognition Summary** section of a performance document.

This example illustrates the fields and controls on the View Recognitions page.

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Both the manager and employee can access the View Recognitions page from:

- Performance documents to view the list of posts that the associated employee has received, if the options for the manager and employee to view recognitions are enabled in the template setup. Posts appear in read-only mode; the manager and employee can add posts to the document if applicable.

  See PeopleSoft ePerformance: Understanding Recognitions in Performance Documents.

- Notification entries to view corresponding posts. Posts appear in edit mode.

Field or Control	Description
Add to Document	Select to insert the corresponding recognition to the **Recognition Summary** section of the document from where the View Recognitions page is accessed. The check box becomes unavailable for edit if the recognition has already been added.

Processing Reported Recognitions

This topic provides an overview of reporting posts and comments, and discusses how to process reported recognitions as administrators.

Pages Used to Process Reported Recognitions

Page Name	Definition Name	Usage
Reported Posts and Comments Tile	-	Access the Reported Posts and Comments page.
Reported Posts and Comments Page	HRRC_ADM_LIST_FL	Review a list of posts or comments reported by users.
Reported <Original Post or Comment> Page	HRRC_ADM_POST_FL	Review and take action on reported posts or comments.

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Reporting Posts and Comments

Users can report inappropriate or abusive recognition posts and post comments from the **More Actions** menu.

When a post or a comment is reported, the content is sent to the administrator for review. During the review, the content is temporarily hidden from the public. The administrator reviews the reported content and decides if it should be displayed or remain hidden.

The system sends notifications to alert users when posts or comments are reported.

Related Topics

- Recognition Notifications
  The system sends out notifications to Recognition users when:

Reported Posts and Comments Page

(Administrator) Use the Reported Posts and Comments page (HRRC_ADM_LIST_FL) to review a list of posts or comments reported by users.

Navigation:

- Select the **Reported Posts and Comments** tile on the Recognition and Digital Badges Dashboard of the PeopleSoft landing page.
- Select the **Recognition and Digital Badges** tile on the Talent Administrator Homepage. On the dashboard that appears, select the **Reported Posts and Comments** tile.
- Select the notification entry of a reported post or comment.

This example illustrates the Reported Posts and Comments page.



When you access this page from the notification entry of a reported post or comment, the system highlights and sets the corresponding recognition entry in focus for easy identification.

> **Note**
>
> The **Type** column and rows for reported comments are not shown, if the **Enable Comments** option is cleared on the HCM Options Page.

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Pending Review

This section lists the information of reported posts and comments that are pending administrator's review.

Select a row to review the content of the corresponding entry on the Reported <Original Post or Comment> Page.

Reviewed Posts and Comments

This section lists the information of reported posts and comments that have been reviewed and acted upon by the administrator, including the decision and date of each review.

Select a reviewed row to view or update as needed.

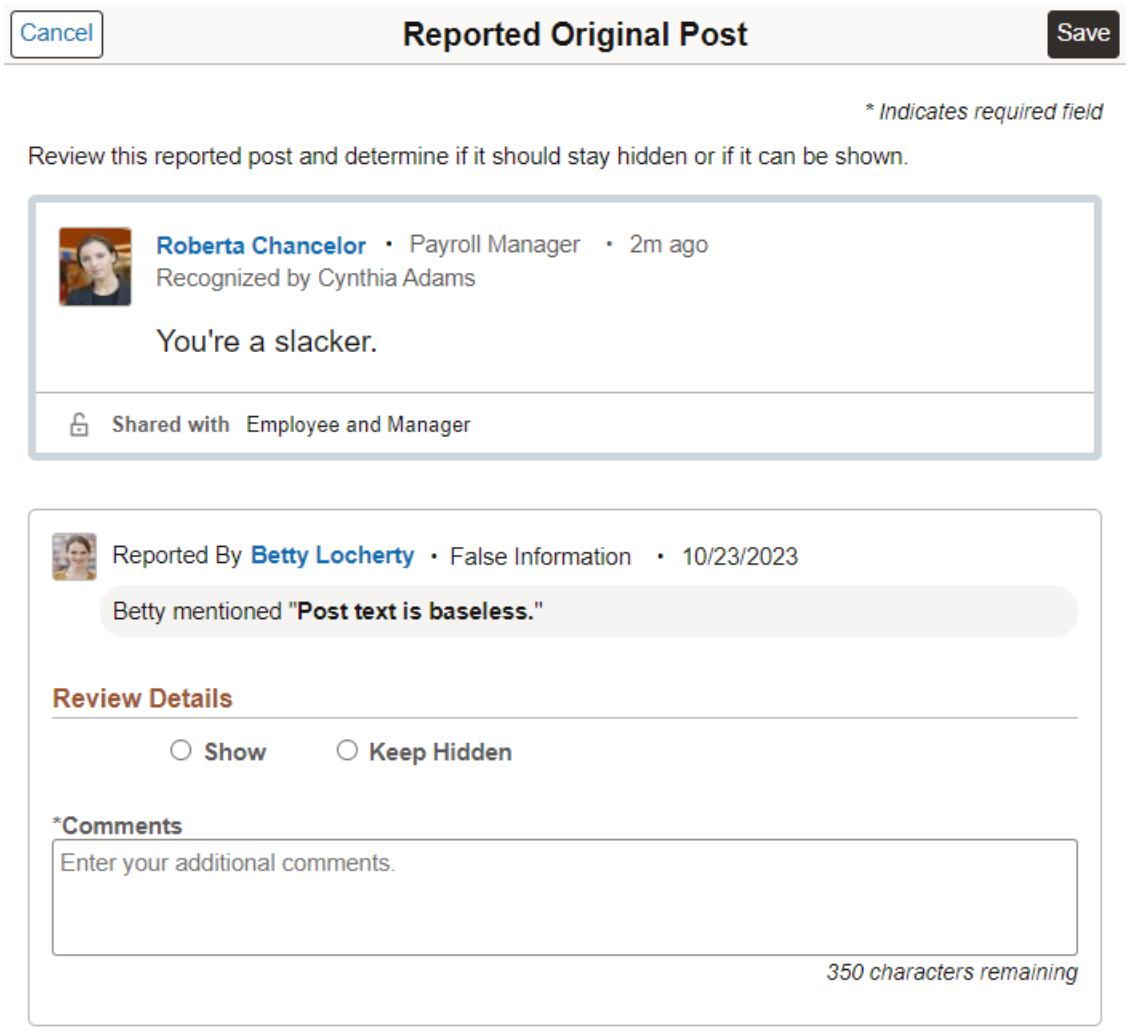
Reported <Original Post or Comment> Page

(Administrator) Use the Reported <Original Post or Comment> page (HRRC_ADM_POST_FL) to review and take action on reported posts or comments.

Select a row on the Reported Posts and Comments Page.

This example illustrates the fields and controls on the Reported <Original Post or Comment> page.

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The layout of the Reported Original Post page and Reported Comment page is identical. The administrator can review the content of the complaint (original post or post comment), reason and comment provided by the reporter, and take the appropriate action.

Field or Control	Description
Show or **Keep Hidden**	Select to either display or hide the reported content after the review. This is required.
Comments	Enter any comment (350 characters maximum) for the review of the reported content. This is required.

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Working with Digital Badges

Understanding Digital Badges

The Digital Badges feature enables organizations to recognize employee achievements, skills, certifications, and key milestones.

Common examples include class completion, licenses and certifications, service anniversaries (5, 10, or 20 years), and participation in company-sponsored activities (such as Heart Walk or volunteer events). Digital badges help increase engagement and acknowledge accomplishments, providing employees with tangible proof of their contributions, which helps keep them motivated.

The Digital Badges feature enables users to award, view or manage badges based on their roles.

Administrators can:

- View badges awarded to employees and issue new badges on the View and Award Badges page.
- Run the Application Engine (AE) process to automatically award badges on the Run Digital Badge Assignment page.
- Set up and manage the Digital Badges feature.

Managers can:

- Manually award badges to team members through recognitions.
- View badges earned by their team members in Team Talent Profile, My Team, Team Snapshot, Directory, and Team Recognition (if associated with recognitions).

Employees can:

- View badges that they earned in Career Snapshot, Directory, and Recognition (if associated with recognitions).
- View badges earned by other employees in Directory.

Ways to Award Digital Badges

Digital badges can be issued both manually and automatically.

- Manually: By administrators on the Give a Badge page, or by managers as part of a recognition.
- Automatically: By running the badge assignment application engine (AE) process from the Run Digital Badge Assignment page, or through event processing.

This table describes the available methods, who can initiate badge awards, where badges are awarded, and other relevant details.

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Award Method	Initiated By	Awarded From	Comment
Manual	Administrator	Give a Badge Page	If the criteria type is *Select Recipients*, badges are awarded instantly upon submission. For other criteria types, badges are awarded using the AE process.
Manual	Manager	New Recognition Page (give a badge as part of a recognition)	Badges used for recognitions must be set up to match a recognition category, or both a category and impact. To award a badge as part of a recognition, a category must be selected in the recognition.
Automatic	Administrator	Run Digital Badge Assignment Page (run control / badge assignment)	Use this run control page to run the AE process to assign digital badges. Only *App Class* and *Query* criteria types are supported on this page. **Note:** Badges given through this method are classified as *system-awarded.*
Automatic	Event-driven	N/A	The system delivers event processing for the *Person Profile* badge category. When enabled (including activation of required event handlers), this event processing setup can award digital badges based on updates to a person's profile (for example, when an Honors and Awards item is added). **Note:** Badges given through this method are classified as *system-awarded.*

Automatic Digital Badge Assignment Process

The system provides an AE process, *BDG_ASSIGN,* that can automatically award badges to recipients in bulk. This process can be launched from two locations:

- Run Digital Badge Assignment page: Administrators can run the process on demand or schedule it to run regularly using Process Scheduler—useful for recurring activities such as service anniversaries.

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- Give a Badge page: This process is used to award badges for all criteria types except *Select Recipients.*

After the process completes, administrators can review the message log and trace details in Process Monitor to view results, including the number of employees awarded and a list of employee IDs.

Where to View Digital Badges

Managers and employees can view employees' awarded digital badges through various HCM features.

They include:

- Team Recognition (also used by managers to award badges) and Recognition.
- Directory
- My Team
- Team Snapshot, View Snapshot (for administrators), and Career Snapshot
- Team Talent Profile and Talent Profile

These access points ensure employee achievements are visible and celebrated across the organization, helping to drive engagement and foster talent development.

Administrators can view and grant digital badges using the View and Award Badges Page.

> **Note**
>
> Oracle plans to add support for Digital Badges in Enterprise Learning Management (ELM) in the future, allowing badges to be automatically issued when employees complete learning modules, certifications, or required training.

Recognition

Managers can award badges to team members as part of creating recognitions in Team Recognition. When adding a recognition, a manager can grant a badge that matches the recognition's category and impact values.

Managers can view details of badges that team members have earned through recognition posts from the Team Recognition pages.

Employees can view details of badges they have earned through recognition posts from the Recognition pages.

Changing the visibility of a recognition does not affect the display of its badge in the system. However, if a recognition is deleted, or reported and hidden, its badge will not be displayed.

Recognition badge reason text originates from the corresponding recognition post and will be displayed publicly. Do not enter sensitive information that should not be visible on the badge.

See Also

Recognition - <Everyone or My Peers> Page

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Directory

Directory provides an organization-wide location to view an employee's digital badges from the employee's directory profile. When an employee has badges, they appear on the PeopleSoft Human Resources Administer Workforce: Profile - Digital Badges Page; if the employee has no badges, the page does not display.

My Team

My Team provides managers with an entry point to view digital badges for their team members. From My Team, a manager can select the *View Digital Badges* related action to access the View Digital Badges Page and review employees' awarded badges.

Team Snapshot, View Snapshot, and Career Snapshot

Team Snapshot enables managers to view digital badges for their team members. View Snapshot enables administrators to view digital badges for any selected employee, and Career Snapshot enables employees to view their own earned badges. From each snapshot, users can access an employee's badge list from the **Digital Badges** tile on the **Summary** dashboard or from the **Recognition and Digital Badges** dashboard.

See Also

PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Team Snapshot - Recognition and Digital Badges Dashboard

PeopleSoft eProfile: Career Snapshot - Recognition and Digital Badges Dashboard

Team Talent Profile and Talent Profile

In Team Talent Profile (for managers) and Talent Profile (for employees), users can view digital badges awarded for items such as earned licenses/certifications or honors/awards that are added or updated in an employee's profile.

See Also

PeopleSoft eDevelopment: Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)

Event Processing

Event processing enables the automatic awarding of digital badges based on specific system events.

When a configured event occurs—such as the addition or update of a person profile item—the system evaluates the event data against the criteria defined for badges that utilize event processing. If the event data meets the set conditions, the badge is awarded automatically.

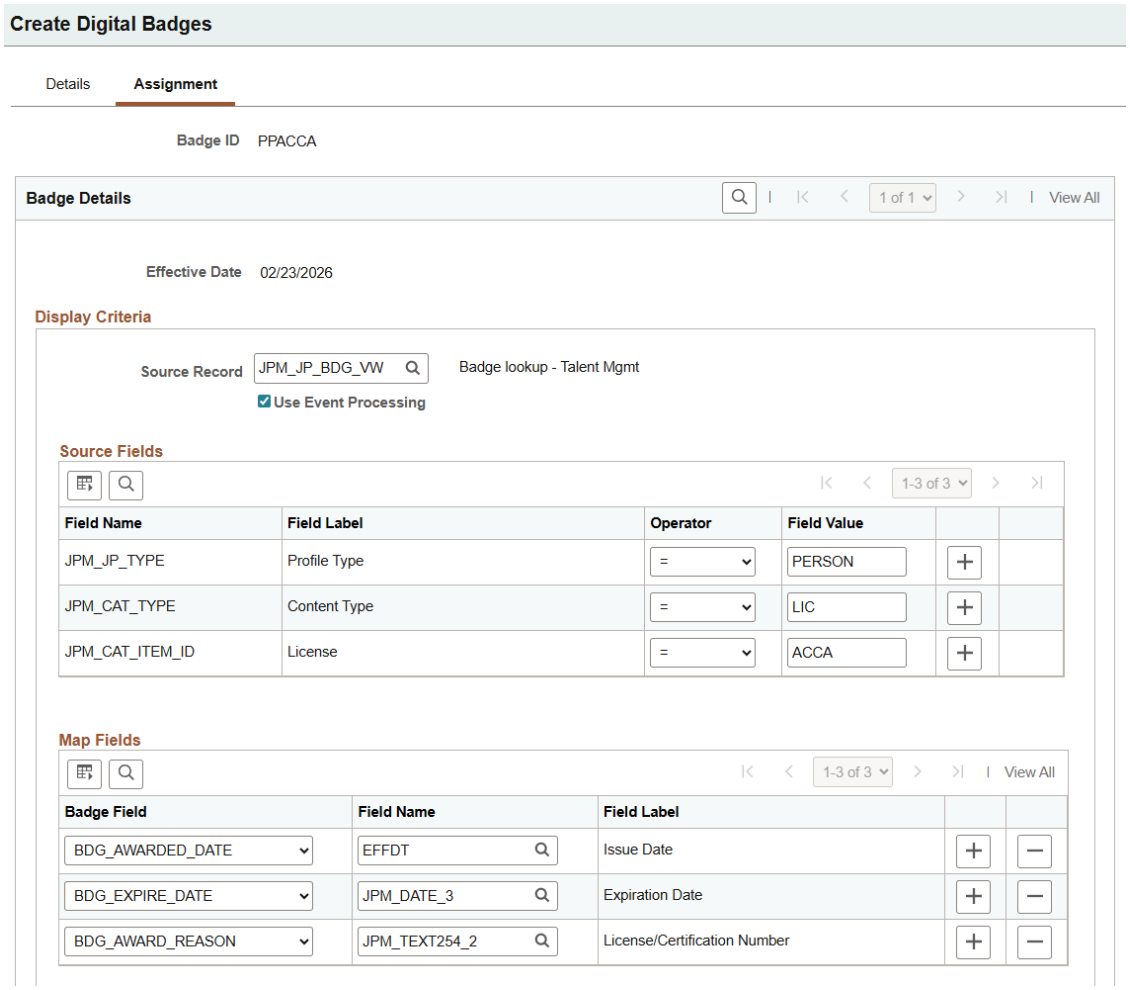
Example: Automatic Badge Award Using Event Processing

This example illustrates a digital badge configuration that uses event processing, including the required setup and the expected behavior when the event is triggered.

In this scenario, a badge is defined for the *Person Profile* category in the system to be awarded automatically when a qualifying item (the *Assoc Chartered Certified Accountant* license in this example) is added or updated in an employee's talent profile.

This screenshot shows the event processing setup for the badge example.

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When you create or update badges that use event processing for the *Person Profile* category, follow these guidelines:

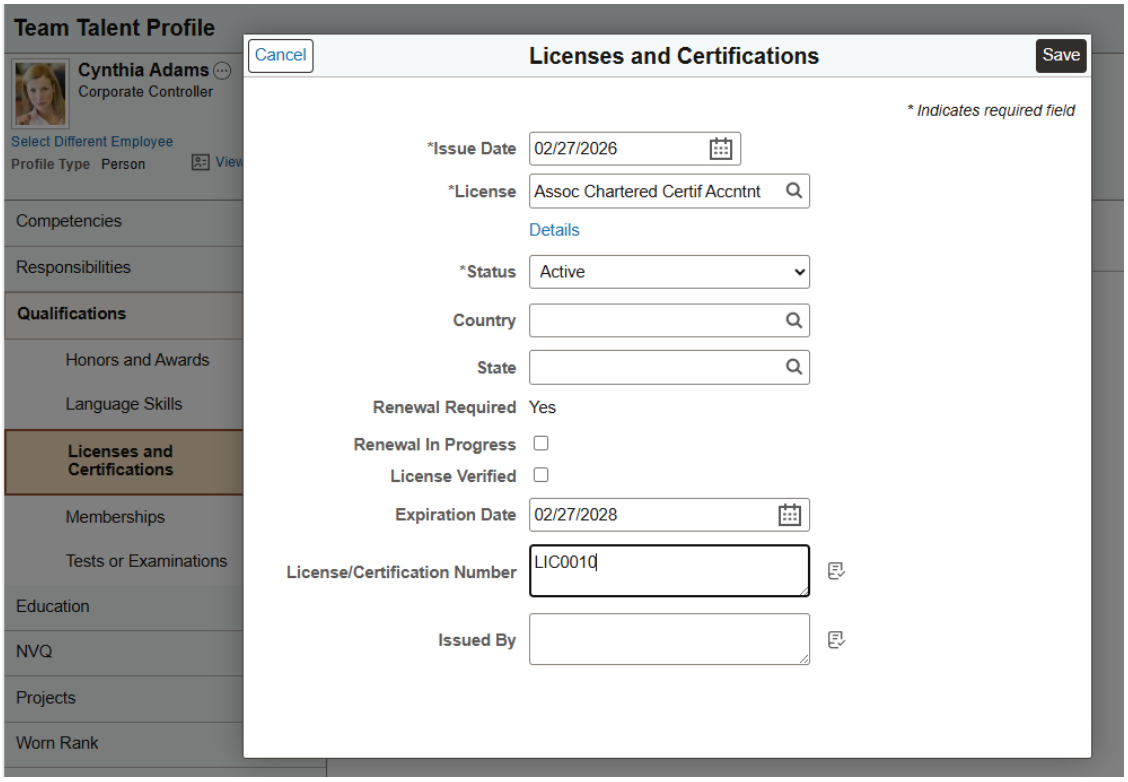
- For Person Profile badges, the system delivers the *JPM_JP_BDG_VW* source record for badge assignment setup as demo data.
- Use the **Source Fields** section to define the criteria (in other words, identify the profile item) for awarding the badge. For the *JPM_JP_BDG_VW* source record (or any other source record that you use), the following fields must be present and have valid values:
  - JPM_JP_TYPE
  - JPM_CAT_TYPE
  - JPM_CAT_ITEM_ID
- Use the **Map Fields** section to map source record fields in Talent Profile to badge fields. During event processing, the system copies the mapped source values into the badge record. In the badge setup example, the **Reason for Badge** field (BDG_AWARD_REASON) on the Badge History page will display the value that was copied from the profile item's **License/Certification Number** field (JPM_TEXT254_2).

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> **Note**
>
> Badges can be set up to inherit the expiration date from an associated license or certification in the **Map Fields** section. When configured this way, a badge will not be displayed if the linked license or certification expires, and will reappear if the license or certification is renewed or extended with a new expiration date. Expired badges remain hidden until the related item becomes valid again.

In Team Talent Profile or Talent Profile, when a user adds or updates the qualifying item (*Assoc Chartered Certified Accountant* license) on the **License and Certifications** page of the employee's profile, the save action triggers event processing.

This screenshot shows the License and Certifications page where a license is added or updated.

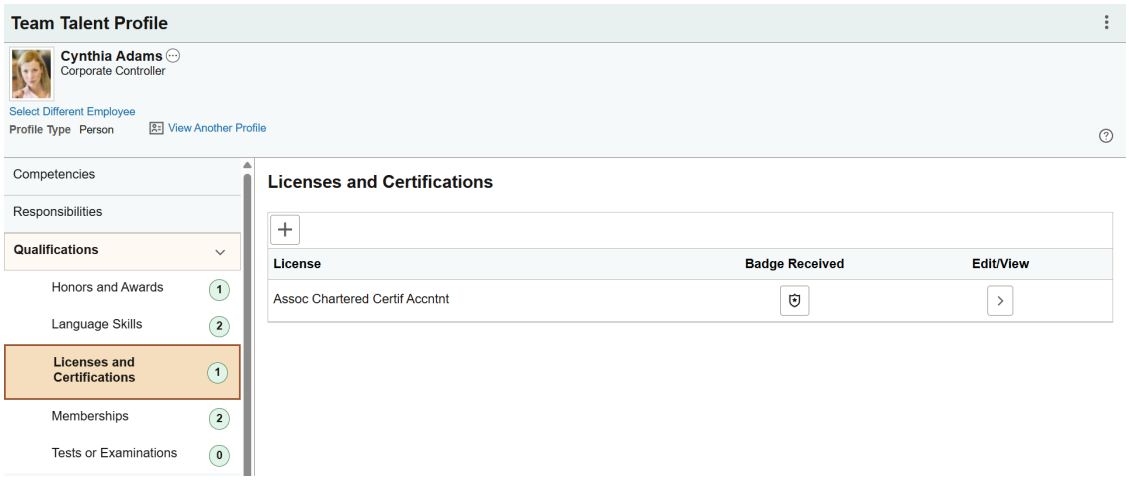


If the saved data matches the badge's configuration in the **Source Fields** section, the badge is awarded automatically after event processing completes.

A badge is displayed for the added item in the **Badge Received** column of the page grid. If the badge does not appear immediately, allow time for event processing to finish and then revisit the page.

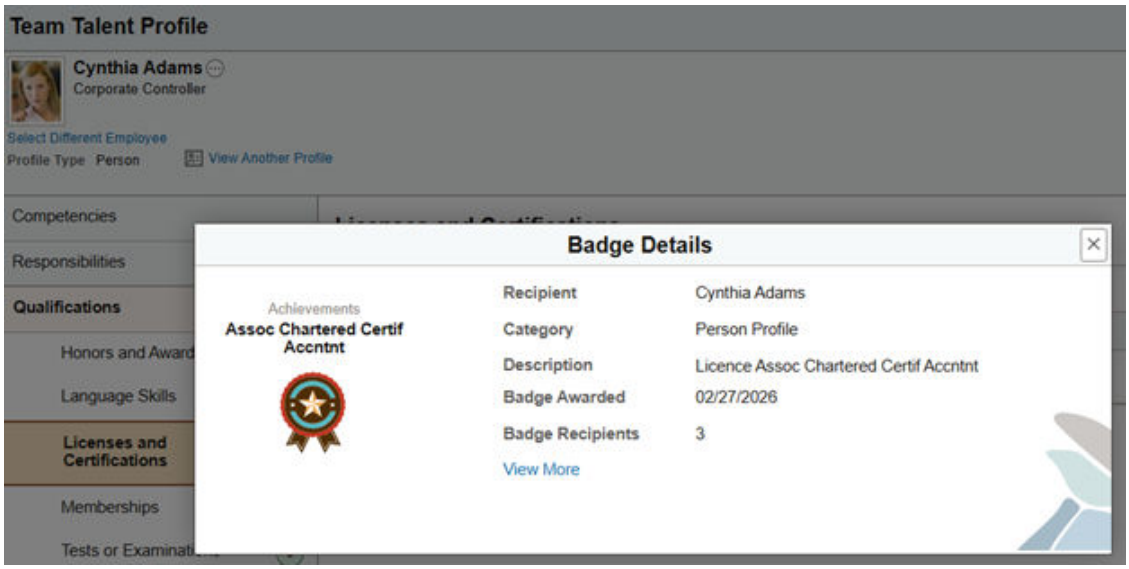
This screenshot displays the badge awarded for the added or updated license on the Licenses and Certifications page.

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Select the badge to review its details on the **Badge Details** page. As configured in the badge event processing setup, the badge awarded date is set as the issue date of the *Assoc Chartered Certified Accountant* license.

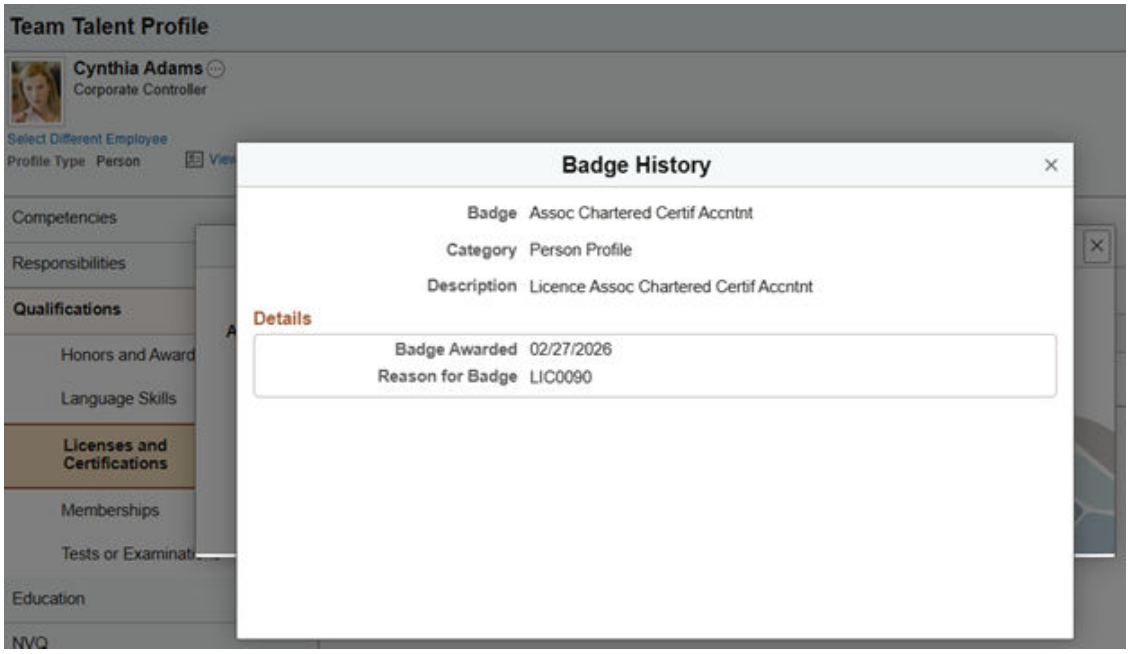
This screenshot shows the badge award date populated with the license issue date on the Badge Details page, based on the setup.



Later, when a user updates the item (for example, changes the license number from *LIC0010* to *LIC0090*), the badge history displays the updated value in the mapped **Reason for Badge** field after event processing completes.

This screenshot shows the updated license number populated in the Reason for Badge field on the Badge Details page, based on the setup.

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Processing and Setup Considerations

Review the following when configuring, awarding, and troubleshooting Digital Badges.

> **Note**
>
> Digital Badges is supported beginning with PeopleTools 8.55. For administrators, the **Recognition and Digital Badges** tile on the Talent Administrator home page provides access to badge administration pages and related tasks. Employees can optionally add the **View Digital Badges** tile to the Employee Self Service home page to view their awarded badges.
>
> To use the tiles and dashboard delivered for Digital Badges on the PeopleSoft landing page, PeopleTools 8.62 is required.

Awarding and processing behavior

- Badges are awarded at the employee ID level, not the employee record level.
- The "detected" recipient count shown when a badge award request is submitted on the Give a Badge page can differ from the final "awarded" count after the AE process completes, if the criteria type input includes duplicate employee IDs. Administrators can use the Process Scheduler logs (for example, View Log/Trace) or the View and Award Badges Page to confirm the final badge award results.

Badge status

- Only active badges can be awarded.
- A badge can still be awarded if its category or type is inactive, provided the badge itself is active.

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  - If the current effective-dated type row is inactive, the badge appears only under All Badges on the View Digital Badges/Digital Badges page.
  - If the current effective-dated category row is inactive, the badge appears with no category.
- Once a badge has been awarded, it remains visible to employees on the View Digital Badges page and administrators on the View and Award Badges page even if its status is later set to inactive. This ensures that earned badges continue to display for appreciation, regardless of subsequent status changes.

Badge visibility and deletion

- Visibility: Administrators can view all unexpired badges on various view badge pages to which they have access. Non-administrator users in general can view all unexpired badges as well. The exception to this rule is when a badge is associated with a reported recognition that is hidden by an administrator.
- Deletion: Administrators can remove badges using the View and Award Badges page.

  When a group badge is deleted, it will be deleted for all recipients.

  Deleting a badge does not remove an associated recognition. Deleting a recognition from Team Recognition removes both the recognition and any associated badge.

Badge setup

- Avoid inactivating digital badge categories or types that are currently used in badge setup. Doing so can cause unexpected badge behavior (for example, awarding, filtering, or display issues).
- Validate recipient populations. When preparing groups, queries, flat files, or application classes to determine recipients for badge assignment, ensure the results exclude employees who should not receive badges based on your company policy (for example, terminated employees or contingent workers).
- If you wish to prevent administrators from manually awarding badges to contingent workers, configure the person selector for the *Select Recipients* criteria type on the Give a Badge page to exclude contingent workers (using Configure Simple Person Search). Similarly, use Direct Reports Transaction Configuration to control whether contingent workers are included as team members when managers award badges through Team Recognition.
- Avoid unintended badge awards. When you write an application class to award a badge, include eligibility and duplicate-check logic that aligns to the badge's intended behavior. For badges intended to be awarded only once per recipient (for example, a 10-year service award), verify whether the recipient already has the badge and skip awarding it again on subsequent runs. For repeatable badges (for example, recognition or volunteer event badges), allow multiple awards only when a new, valid trigger occurs, and prevent duplicate awards for the same event or transaction.
- Do not mix automatic and manual awards without a plan. For example, if you use event processing for automatic awards (for example, license or honor award badges), avoid also awarding the same badge manually using the Give a Badge page, except for controlled baseline scenarios (for example, initial license/certification population).
- Use separate badge IDs for recurring programs. For badges awarded on a regular schedule (for example, annual compliance training), create a new badge ID for each award cycle instead of adding effective-dated rows. This approach supports cleaner implementation and simplifies troubleshooting.

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User Interface

Page layout and visual appearance may vary slightly depending on the browser and browser version used.

Setting Up Digital Badges

This topic provides the Digital Badges setup overview, lists delivered user roles, and discusses how to set up the Digital Badges feature.

Pages Used to Set Up Digital Badges

Page Name	Definition Name	Usage
Recognition and Digital Badges Tile	HC_HRRC_ADMIN_FL_GBL_LINK (this is the cref for the tile)	Access the Recognition and Digital Badges dashboard.
Recognition and Digital Badges Dashboard	HC_HRRC_ADMIN_FL_GBL	Access tiles to set up and manage recognitions and digital badges as an administrator.
Upload Images Tile	HC_BDG_IMAGE_TBL_GBL_LINK (this is the cref for the tile)	Access the Digital Badge Images page.
Digital Badge Images Page	BDG_IMAGE_TBL	Upload images for digital badges.
Define Categories Tile	HC_BDG_FN_AREA_TBL_GBL_LINK (this is the cref for the tile)	Access the Digital Badge Categories page.
Digital Badge Categories Page	BDG_CATEGORY_TBL	Review or manage badge categories. Define source record setup for badge assignment, if needed.
Define Types Tile	HC_BDG_CAT_TYP_TBL_GBL_LINK (this is the cref for the tile)	Access the Digital Badge Types page.
Digital Badge Types Page	BDG_TYPE_TBL	Review or define types that organize digital badges.
Create Digital Badges Tile	HC_BDG_DEFN_TBL_GBL_LINK (this is the cref for the tile)	Access the Create Digital Badges pages.
Create Digital Badges - Details Page	BDG_DEFN_TBL	Create digital badges.
Create Digital Badges - Assignment Page	BDG_DEFN_ASGN_TBL	Define assignment methods for badges.
Run Digital Badge Assignment Tile	HC_BDG_RUN_ASSIGN_GBL_LINK (this is the cref for the tile)	Access the Run Digital Badge Assignment page.
Run Digital Badge Assignment Page	BDG_RUN_ASSIGN	Award badges to recipients automatically.

Setting Up Digital Badges

These are the high-level steps to set up the Digital Badges feature:

1. Ensure that the **Enable Digital Badges** check box is selected on the HCM Options Page of the Installation Table.

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2. Use the Digital Badge Images Page to add images to be used for badges.
3. Use the Digital Badge Categories Page to review functional areas enabled for badge awards and confirm their categories are active.

   System-delivered categories are available. The system provides source record setup for the *Person Profile* category for event-based badge awards.
4. Use the Digital Badge Types Page to configure tab labels and associate images with badge types.

   System-delivered types are available.
5. Use the Create Digital Badges - Details Page and Create Digital Badges - Assignment Page to define badges and assignment details.
6. (To enable awarding badges using event processing for the *Person Profile* category) Use the Events and Notifications Framework: Define Events Page in Enterprise Components to set the following events to *Active:*
   - JPMProfileAdded
   - JPMProfileUpdated

   Additionally, make sure that the handlers for these events are also set to *Active* on the Events and Notifications Framework: Registered Handlers Page.

Roles and Permission Lists

The following table lists the system-delivered role for managing and accessing digital badges.

Role	Description
Digital Badges Administrator	This role provides administrator access to set up digital badges, award badges manually, run the application engine process to assign badges automatically, and delete badges.

The following table lists the system-delivered permission lists for managing and accessing digital badges.

Permission List	Description
HCLPBDGMNG (Digital Badges Administrator)	This permission list provides access to the Give a Badge page and the View and Award Badges page. It is assigned to the *Digital Badges Administrator* role by default.
HCLPBDGSET (Digital Badges Setup)	This permission list provides access to all setup pages for the Digital Badges feature, including pages for types, categories, and individual badges, the Fluid Popup Menu Setup page, and the application engine page for automatic badge assignment. It is assigned to the *Digital Badges Administrator* role by default.
HCLPSSBDG (Digital Badges Self Service)	This permission list provides access to the View Digital Badges pages. It is assigned to the *Self Service* role by default.

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Permission List	Description
HCLPTSSBDG (Team Digital Badges)	This permission list provides access to the View Digital Badges pages and enables users to award badges when creating new recognitions from Team Recognition. It is assigned to the *Team Self Service* role by default.

Recognition and Digital Badges Tile

Use the Recognition and Digital Badges tile (HC_HRRC_ADMIN_FL_GBL_LINK) to access the Recognition and Digital Badges dashboard for a consolidated view of tasks for setting up and managing recognitions and digital badges as an administrator.

Navigation:

The **Recognition and Digital Badges** tile can be found:

- In the **Org Planning and Development** section of the Manage People and Jobs Dashboard of the PeopleSoft landing page.
- On the Talent Administrator Homepage.

This example illustrates the Recognition and Digital Badges tile.



See Recognition and Digital Badges Dashboard.

Recognition and Digital Badges Dashboard

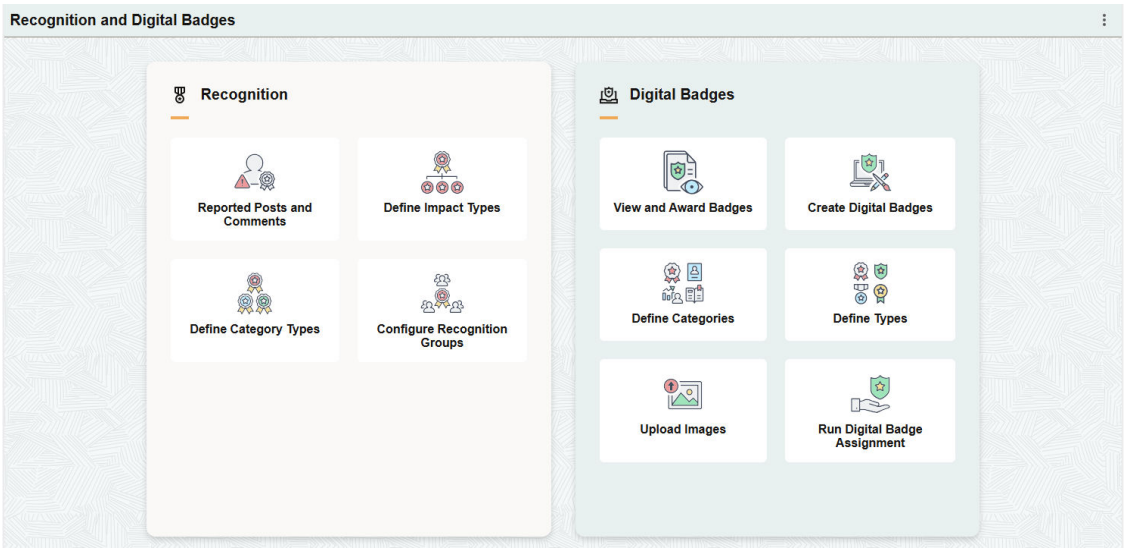
Use the Recognition and Digital Badges dashboard (HC_HRRC_ADMIN_FL_GBL) to access tiles to set up and managing recognitions and digital badges as an administrator.

Navigation:

Select the **Recognition and Digital Badges** tile.

This example illustrates the Recognition and Digital Badges dashboard.

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The **Recognition and Digital Badges** dashboard includes the following sections and tiles.

- **Recognition** section

  This section appears when the Recognition feature is enabled.

  - Reported Posts and Comments Tile (see Reported Posts and Comments Page)
  - Define Impact Types Tile (see Recognition Impact Type Page)
  - Define Category Types Tile (see Recognition Category Type Page)
  - Configure Recognition Groups Tile (see Configure Recognition Groups Page)

- **Digital Badges** section
  This section appears when the Digital Badges feature is enabled.
  - View and Award Badges Tile
  - Create Digital Badges Tile
  - Define Categories Tile
  - Define Types Tile
  - Upload Images Tile
  - Run Digital Badge Assignment Tile

Upload Images Tile

(Administrator) Use the Upload Images tile (HC_BDG_IMAGE_TBL_GBL_LINK) to access the Digital Badge Images page.

Navigation:

The **Upload Images** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the Upload Images tile.

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Select this tile to access the Digital Badge Images Page.

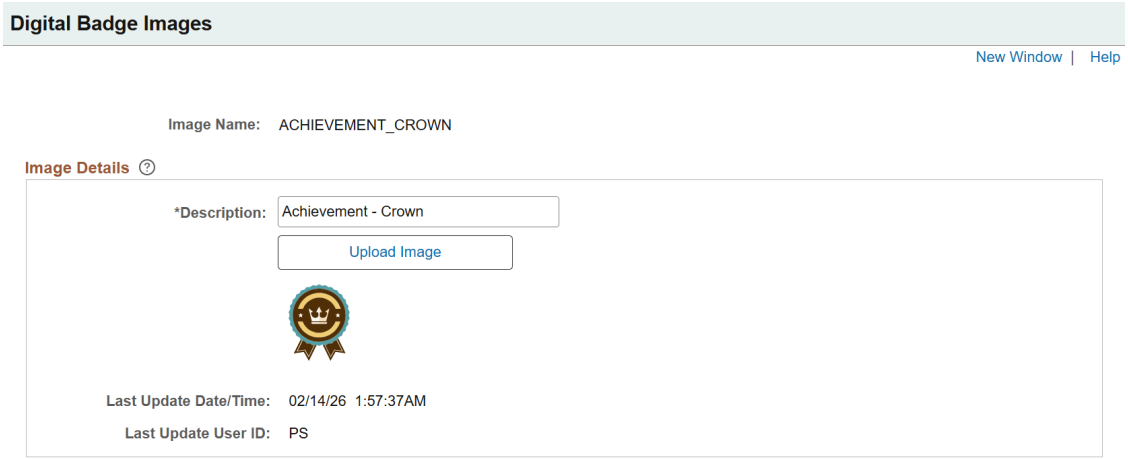
Digital Badge Images Page

Use the Digital Badge Images page (BDG_IMAGE_TBL) to upload images for digital badges.

Navigation:

Select the **Upload Images** tile on the Recognition and Digital Badges dashboard.

This example illustrates the Digital Badge Images page.



The system provides default images for badges as demo data, and customers can upload their own if needed. Only SVG file format is supported. For best results, use images no larger than 80x80 pixels.

Define Categories Tile

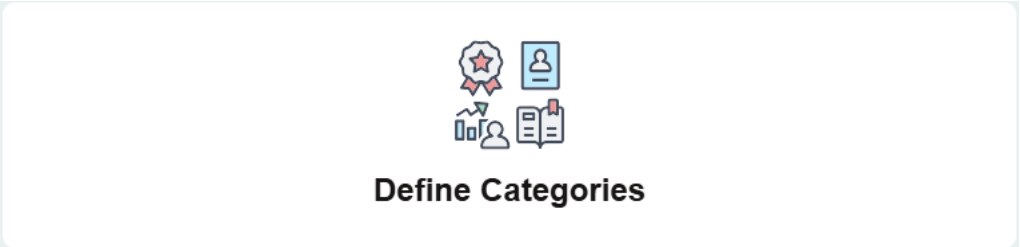
(Administrator) Use the Define Categories tile (HC_BDG_FN_AREA_TBL_GBL_LINK) to access the Digital Badge Categories page.

Navigation:

The **Define Categories** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the Define Categories tile.

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Select this tile to access the Digital Badge Categories Page.

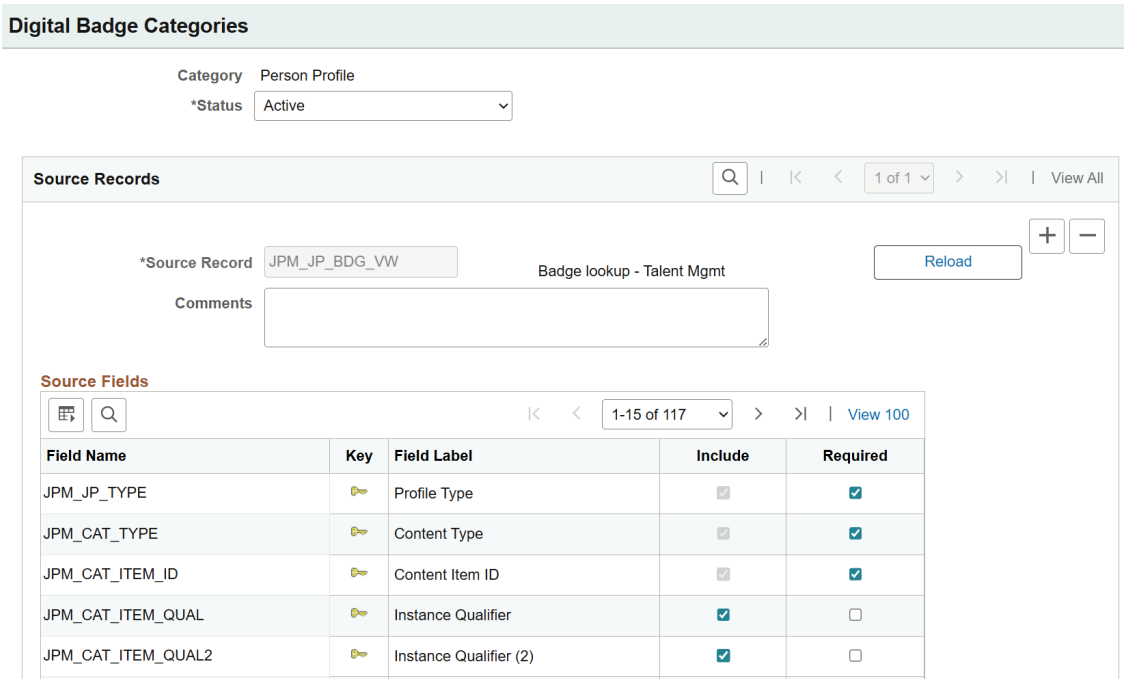
Digital Badge Categories Page

Use the Digital Badge Categories page (BDG_CATEGORY_TBL) to review or manage badge categories. Define source record setup for badge assignment, if needed.

Navigation:

Select the **Define Categories** tile on the Recognition and Digital Badges dashboard.

This example illustrates the Digital Badge Categories page.



Digital badge categories are used during badge setup to associate badges with a functional area (for example, Person Profile or Recognition).

A category can optionally include source record setup to support badge assignment, primarily for automatic badge assignment using event processing. When defined, this source record information becomes available during badge definition when the category is selected.

The system provides the following badge categories as system data:

- Employee Data

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- Learner History
- Performance Document
- Person Profile
- Recognition

> **Warning**
>
> Avoid inactivating a digital badge category after it has been used to create badges, as this may cause previously awarded badges to display incorrectly or inconsistently.

Field or Control	Description
Category	Displays the badge category name.
Status	Select *Active* to make the badge category eligible for awarding badges and badge creation.

Source Records

> **Note**
>
> Source record and field setup is not required at the category level; however, when defined, it can be used to configure badge assignment in badge definitions. For more information, see the Create Digital Badges - Assignment Page topic.
>
> The system delivers source record setup (JPM_JP_BDG_VW) as demo data for the *Person Profile* category to support event-based badge assignment. It is used when configuring badges that are automatically awarded based on updates to a person's profile.

Field or Control	Description
Source Record	Specify the record(s) to use for badge assignment setup in the corresponding category. The system provides the *JPM_JP_BDG_VW* source record for the *Person Profile* category.
Reload	Select this option to refresh the source record data on the page, such as after making updates in App Designer. If changes are detected, you will be prompted and can choose to reload the updated data.

Source Fields

Field or Control	Description
Field Name	Displays the name of a field from the specified source record.
Key	Indicates that this field serves as a key field.

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Field or Control	Description
Include	Select to make this field available for assignment setup when the corresponding category is selected during badge creation.
Required	Select to make this field value required (if included) in assignment setup when the corresponding category is selected during badge creation.

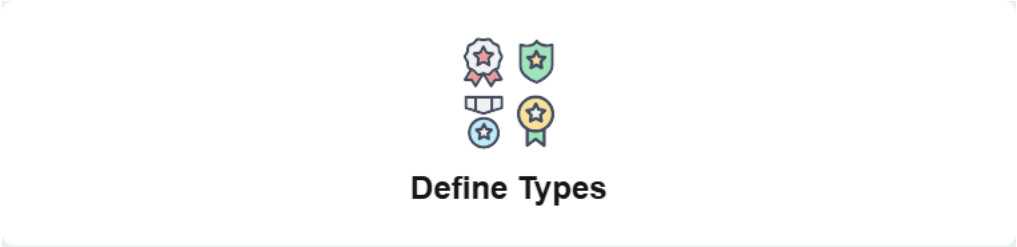
Define Types Tile

(Administrator) Use the Define Types tile (HC_BDG_CAT_TYP_TBL_GBL_LINK) to access the Digital Badge Types page.

Navigation:

The **Define Types** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the Define Types tile.



Select this tile to access the Digital Badge Types Page.

Digital Badge Types Page

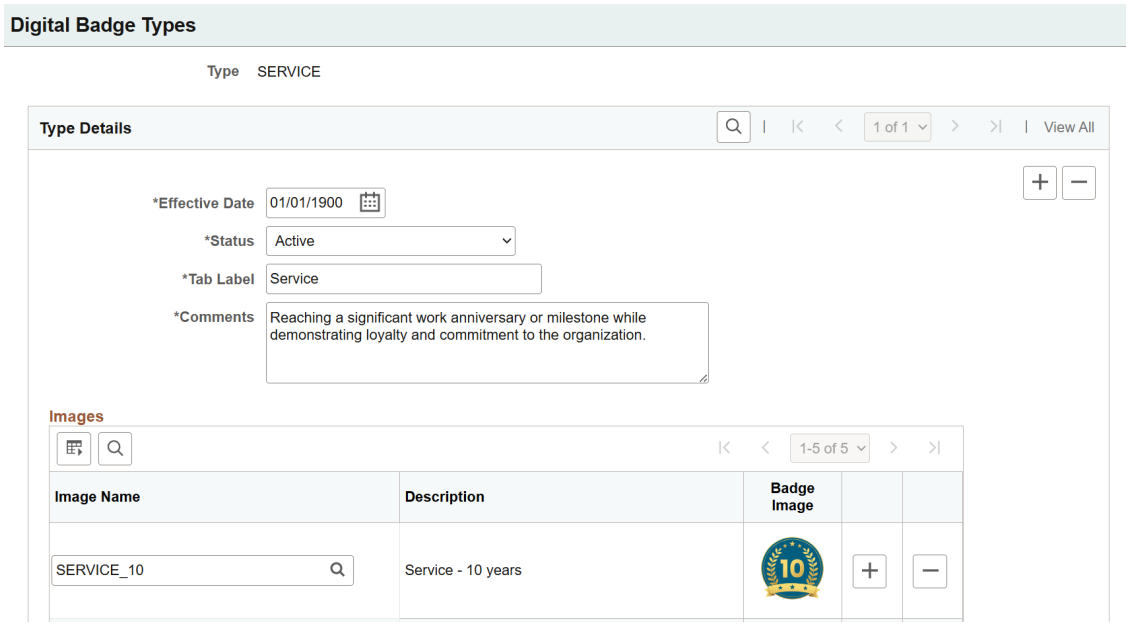
Use the Digital Badge Types page (BDG_TYPE_TBL) to review or define types that organize digital badges.

Navigation:

Select the **Define Types** tile on the Recognition and Digital Badges dashboard.

This example illustrates the Digital Badge Types page.

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Digital badge types are used during badge setup to determine which badge images are available for selection. They also group badges under tabs (for example, Achievements, Learning, or Service) on the View Digital Badges page at runtime.

The system provides the following badge types as demo data:

- ACHIEVEMENT (Achievements)
- EVENT (Event)
- LEARNING (Learning)
- SERVICE (Service)

> **Warning**
>
> Avoid inactivating a digital badge type after it has been used to create badges, as this may cause previously awarded badges to display incorrectly or inconsistently (for example, type-based tab labels may no longer appear as expected when viewing digital badges).

Field or Control	Description
Type	Displays the badge type name.
Status	Select *Active* to make the badge type eligible for awarding badges and badge creation.
Tab Label	Enter a label for this type. It will be used as the tab label when viewing individuals' badges by type on the View Digital Badges Page.

Use the **Images** section to insert badge images that can be used for the corresponding badge type during badge creation. Badge images are uploaded to the system using the Digital Badge Images Page.

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Create Digital Badges Tile

(Administrator) Use the Create Digital Badges tile (HC_BDG_DEFN_TBL_GBL_LINK) to access the Create Digital Badges pages.

Navigation:

The **Create Digital Badges** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the Create Digital Badges tile.



Select this tile to access the Create Digital Badges - Details Page.

Create Digital Badges - Details Page

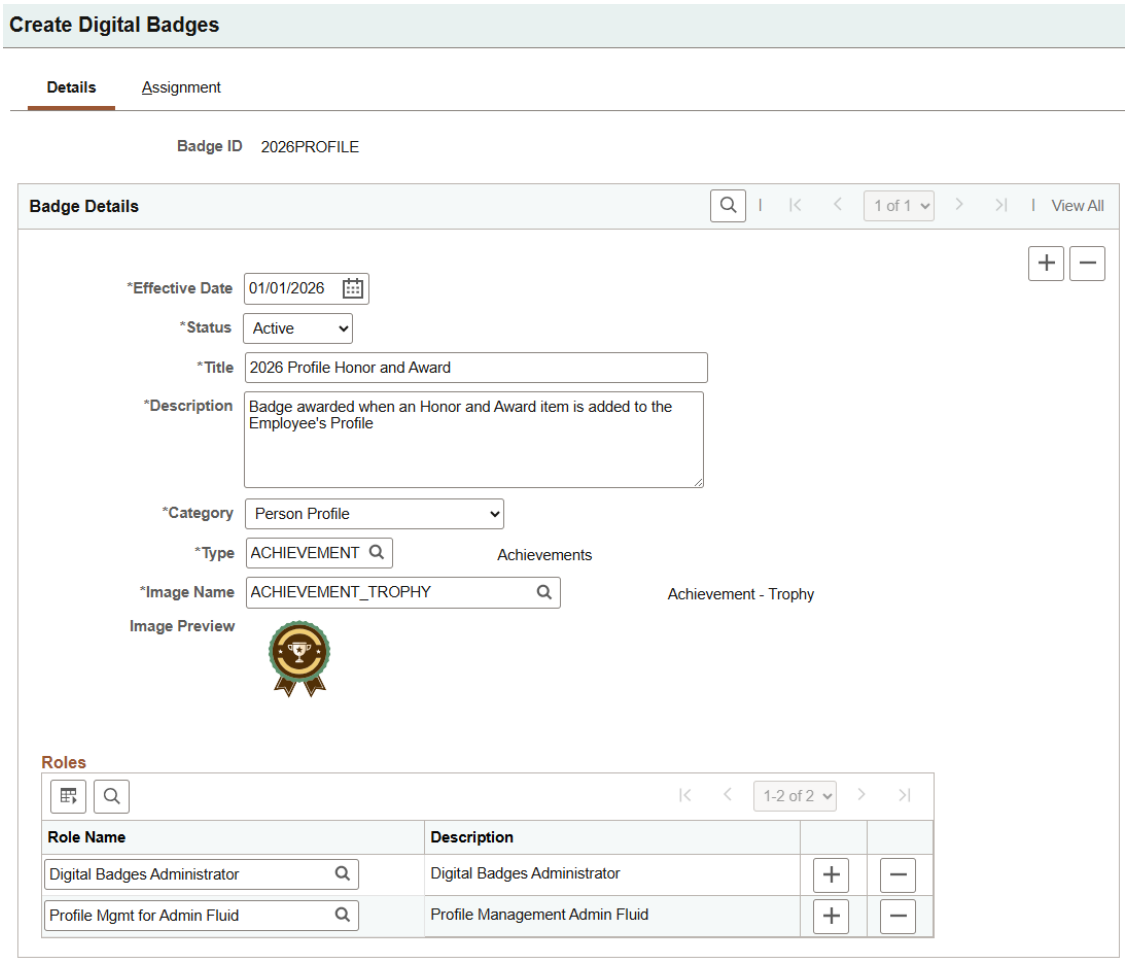
Use the Create Digital Badges - Details page (BDG_DEFN_TBL) to create digital badges.

Navigation:

Select the **Create Digital Badges** tile on the Recognition and Digital Badges dashboard.

This example illustrates the Create Digital Badges - Details page.

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The system provides several digital badge examples as demo data.

Field or Control	Description
Effective Date	Specify the date on which the badge becomes effective. If a badge has multiple effective-dated rows, the current active effective-dated row is used when selecting the badge to be awarded.
Status	Select: *Active* to make the badge eligible for awarding. *Inactive* to make the badge unavailable for awarding.
Title and **Description**	Enter a title and detailed description for the badge. The title will appear above the badge image, and the description will be shown in the badge details.
Category	Select the functional area in which the badge can be awarded. Categories are defined on the Digital Badge Categories Page. Only active categories are available for selection.

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Field or Control	Description
Recognition Details link	Select to specify the recognition category, impact, or both associated with the badge, if applicable. This link is available when the selected category is *Recognition*. A badge is available for selection during recognition creation, if the badge category and impact match exactly those specified in the recognition. See Also New Recognition Page.
Type	Select a type for the badge. Types are defined on the Digital Badge Types Page. Only active types are available for selection.
Image Name	Select an image for the badge. Images belonging to the selected type are available for selection. The selected image appears in the **Image Preview** field.

Roles

Use this section to specify which user roles are permitted to award the badge. This security setup is enforced when:

- Managers assign badges during recognition creation. Managers can select only badges that are associated with roles they have.
- Badges are awarded through event processing. When an event triggers a badge award (for example, a license or certification is added or updated in Talent Profile), the system verifies that the user who performed the action has the required role before awarding the badge.

> **Note**
>
> If you do not specify any roles, the badge is available to all users who can award badges.
>
> This role restriction does not apply to administrators awarding badges on the Give a Badge Page. By default, users with the *Digital Badges Administrator* role can award any badge.

Create Digital Badges - Assignment Page

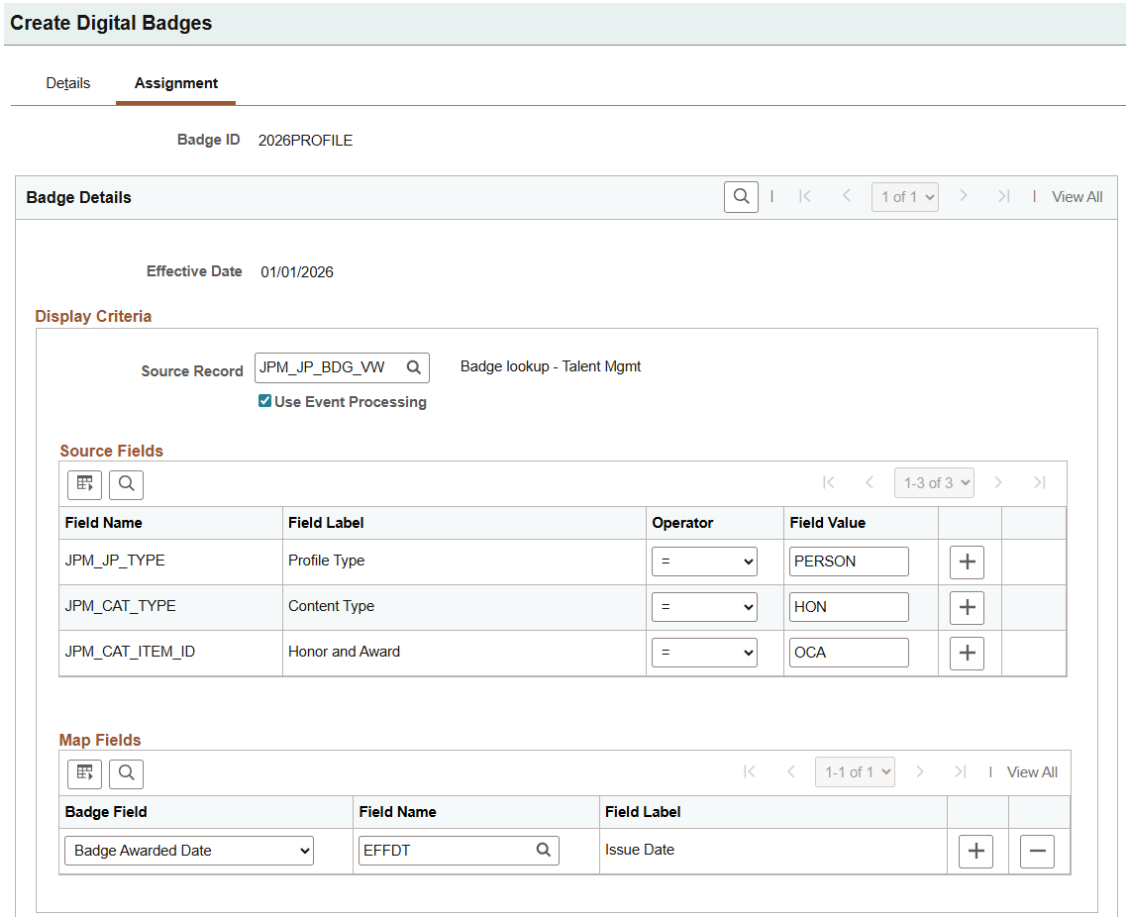
Use the Digital Badges - Assignment page (BDG_DEFN_ASGN_TBL) to define assignment methods for badges.

Navigation:

Select the **Create Digital Badges** tile on the Recognition and Digital Badges dashboard. Select the **Assignment** tab.

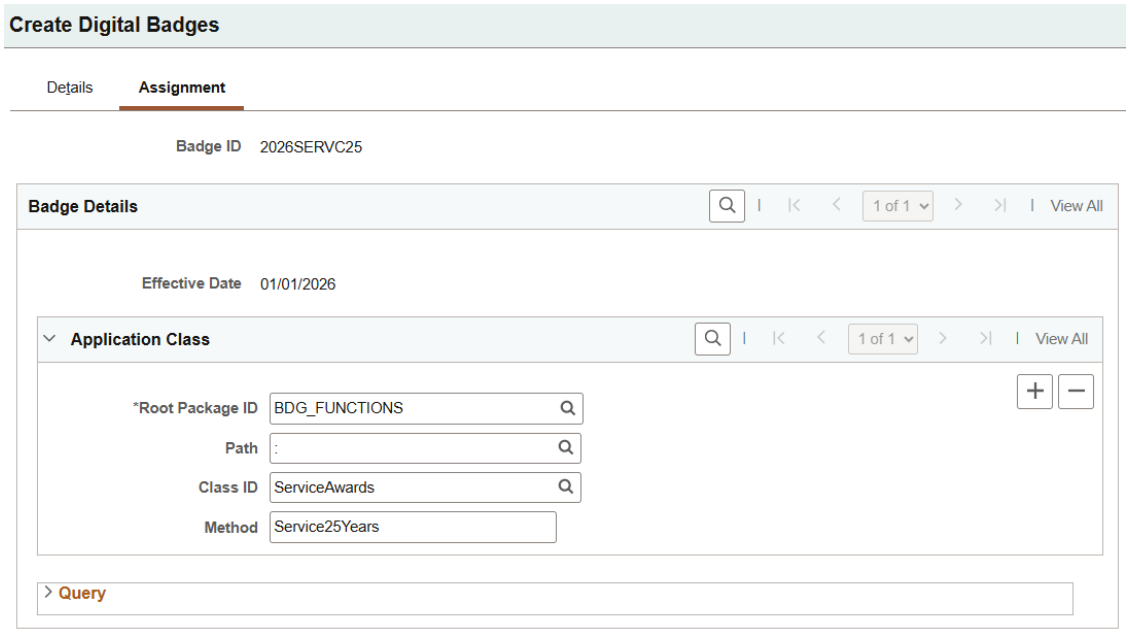
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This screenshot illustrates the Create Digital Badges - Assignment page. It displays the **Display Criteria** section for an example digital badge of the *Person Profile* category that uses event processing.

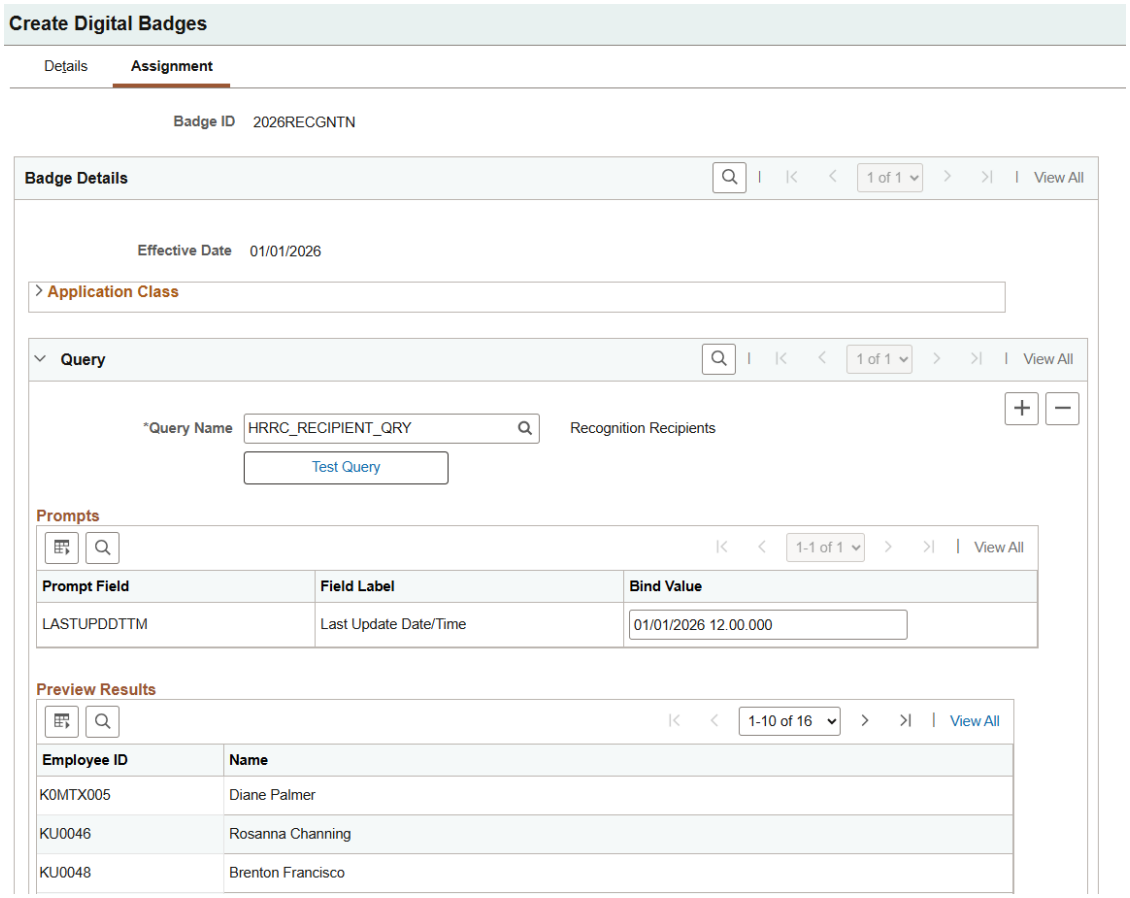


This screenshot illustrates the Create Digital Badges - Assignment page with the **Application Class** section displayed.

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This screenshot illustrates the Create Digital Badges - Assignment page with the **Query** section displayed.



Setup on this page is required for badges that:

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- Determine recipients using a PeopleSoft query or an application class, or
- Are awarded through event processing (demo data provided for the *Person Profile* category).

A badge can have more than one assignment method setup (for example, query and application class) if needed. When only one assignment method is defined, the system automatically populates the related fields on the Run Digital Badge Assignment page or the Give a Badge page after you select the badge and the matching assignment method (criteria type).

Display Criteria

> **Note**
>
> This section appears when the selected category is *Person Profile.*

Person Profile badges can be set up to use event processing or other methods (application class or query) to assign badges to fit your business needs.

Field or Control	Description
Source Record	Select the source record that the system uses to evaluate display/award criteria for this badge. This record drives which fields are available in the **Source Fields** and **Map Fields** sections. Available source records are set up on the Digital Badge Categories Page. Currently, the system provides the *JPM_JP_BDG_VW* source record as demo data for the *Person Profile* category.
Use Event Processing	Select to enable event-based badge awards. When a configured event occurs, the system checks the conditions in the **Source Fields** section and awards the badge if the criteria match. This field appears if a source record is selected. To award Person Profile badges using event processing, you must activate the *JPMProfileAdded* and *JPMProfileUpdated* events, along with their associated event handlers, in the Event Framework. **Note:** Person Profile badges can also be configured to use other assignment methods besides event processing. If the **Use Event Processing** field is not selected, awarded badges can still be displayed in Talent Profile or Team Talent Profile based on the setup in the **Source Fields** section. See Also Event Processing.

Source Fields

Use the **Source Fields** section to define the source record field criteria that controls when the system awards the badge.

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This section appears if a source record is selected.

> **Note**
>
> (For Person Profile badges) The **Source Fields** section is required for event processing as well as other assignment method setup (application class and query). This setup also determines whether the badge appears for the related content item in Talent Profile and Team Talent Profile.

Field or Control	Description
Field Name, Operator, and **Field Value**	Use source fields to define the criteria (identify the profile item) for the badge to be awarded. **Note:** For the *JPM_JP_BDG_VW* source record, these fields are required and must be populated with valid values for dependent prompts in the **Map Fields** section to work: JPM_JP_TYPE (Profile Type) JPM_CAT_TYPE (Content Type) JPM_CAT_ITEM _ID You can add additional source fields. If an added field is optional and you leave its value blank, the condition evaluates as a blank value. Also, when adding a new source field, available values in the prompt are determined by the JPM_JP_TYPE and JPM_CAT_TYPE entries, which must have valid values. Refer to the Event Processing topic for an example of digital badge configuration using event processing. This topic includes the required setup and describes the expected behavior when the event is triggered.

Map Fields

Use the **Map Fields** section to specify which source record fields populate the badge fields (for example, the **Badge Awarded** field in badge details and badge history).

This section appears if the **Use Event Processing** option is selected.

Field or Control	Description
Badge Field	Select a transaction field of the badge you want the system to populate from the source data. For the JPM_JP_BDG_VW source record, these badge fields are available for selection: Badge Awarded Date Badge Award Reason Badge Expiration Date

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Field or Control	Description
Field Name and **Field Label**	Specify the source record field that supplies the value for the corresponding badge field. The list of available values from the prompt is based on the setup in the **Source Fields** section. The label of the selected field is then displayed. For example, if the badge field is *Badge Awarded Date* and the source field name is *EFFDT* (Issue Date), the system populates the badge awarded date with the issue date of the associated profile item.

Application Class

Use the **Application Class** section to specify the application class and method that the system uses to derive the badge recipient list.

The system provides the *BDG_FUNCTIONS* root package, *ServiceAwards* class, and *Service5Years, Service10Years, Service20Years,* and *Service25Years* methods for work anniversary badges. This application class is delivered as demo data, and customers who wish to use it must update the logic to meet their specific service award requirements.

> **Note**
>
> When you use an application class to determine badge recipients, follow these recommendations:
>
> - Define recipient-selection logic at the badge level. For example, for milestone-based programs (such as service anniversary badges), use a separate badge ID and a dedicated Application Class method per milestone (for example, 5-year, 10-year, 15-year). This keeps each method narrowly scoped and easier to test, maintain, and troubleshoot.
> - Design the application class to return a clean, eligible population by filtering out employees who should not be awarded badges (for example, ineligible workers such as terminated workers or other excluded populations based on your business rules). If a badge is intended to be awarded only once, include logic to prevent the badge from being re-awarded on subsequent runs.

Query

Field or Control	Description
Query Name	Specify the PeopleSoft Query that returns the recipients (a list of employee IDs) for this badge assignment method.
Test Query	Run the selected query using the specified prompt field bind values in the **Prompts** grid and display the output in **Preview Results** grid. Use the results to validate that the query returns the expected recipient population before using it for awarding badges.
Prompts grid	Displays the prompts defined on the query and enables you to enter values for each prompt.

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Field or Control	Description
Prompt Field	Displays the query prompt field name (record field) that requires a value (for example, *LASTUPDDTTM*).
Field Label	Displays the label for the prompt field (for example, *Last Update Date/Time*).
Bind Value	Enter the value that the system passes into the query prompt at runtime (for example, an "as of" date/time).
Preview Results grid	Displays example output columns showing who would be selected by the query using the specified prompt field bind values. Use the preview to spot unexpected or unwanted results (for example, duplicates, ineligible employees) and refine the query accordingly. **Note:** For large query result sets, the preview displays only the first 500 rows. To review the complete results, run the query directly.

Run Digital Badge Assignment Tile

(Administrator) Use the Run Digital Badge Assignment tile (HC_BDG_RUN_ASSIGN_GBL_LINK) to access the Run Digital Badge Assignment page.

Navigation:

The **Run Digital Badge Assignment** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the Run Digital Badge Assignment tile.



Select this tile to access the Run Digital Badge Assignment Page.

Run Digital Badge Assignment Page

Use the Run Digital Badge Assignment page (BDG_RUN_ASSIGN) to award badges to recipients automatically.

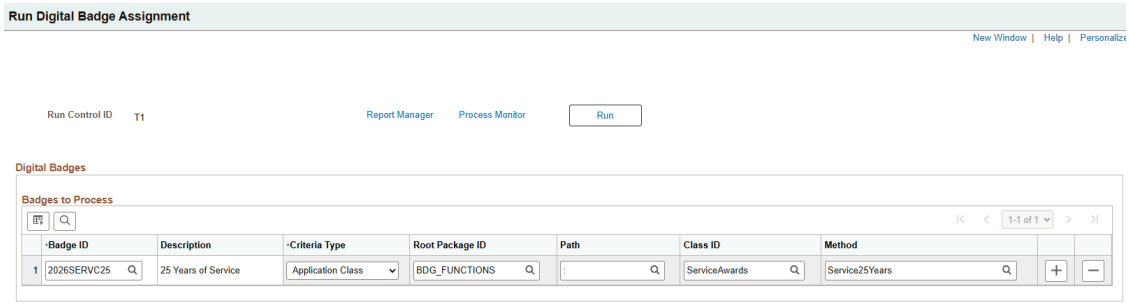
Navigation:

Select the **Run Digital Badge Assignment** tile on the Recognition and Digital Badges dashboard.

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The system provides an Application Engine (AE) process that issues badges to recipients automatically. This process is especially beneficial for recurring activities such as service milestones or class completions. Administrators can initiate the process on demand, or schedule it to run automatically using Process Scheduler.

This example illustrates the Run Digital Badge Assignment page.



Field or Control	Description
Run	Select to run the Assign Digital Badges AE process (BDG_ASSIGN) to issue badges selected in the **Digital Badges** section.

Digital Badges

Field or Control	Description
Badge ID	Select a badge to be awarded automatically. The system prepopulates the remaining parameters, if possible. Only badges with application class or query setup are available for selection. You may select multiple badges (for example, 10-year service award, 15-year service award, and so on) to be processed in the same run control ID and schedule the AE process to run regularly.
Criteria Type	Specify the method for identifying badge recipients. Values include: *Application Class:* Specify an application class that returns the list of recipients. This option is available if one or more application classes are set up for the selected badge. *PS Query:* Specify a query that returns the list of recipients. This option is available if one or more queries are set up for the selected badge. See Also Create Digital Badges - Assignment Page.
Query Name	Select the query used to identify badge recipients. This field become editable if the selected criteria type is *PS Query.*

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Field or Control	Description
Root Package ID, Path, Class ID, and **Method**	Use these fields to specify the application class used to identify badge recipients. These fields become editable if the selected criteria type is *Application Class.*

Working with Digital Badges

Digital badges are used within the organization to recognize achievements, milestones, and exemplary behaviors.

- Administrators can:
  - View all awarded badges on the View and Award Badges Page.
  - Award badges manually to individuals across the organization using the Give a Badge Page.
  - Award badges automatically using the Run Digital Badge Assignment Page.

    Note

    The system provides an application engine (AE) program to issue badges through a batch process, which automates the awarding of badges for recurring events within the organization, such as service anniversaries, course completions, or volunteering activities.

- Managers can:
  - View the badges awarded to their team members in Directory, Team Talent Profile, and Team Snapshot. See:

    PeopleSoft Human Resources Administer Workforce: Profile - Digital Badges Page

    PeopleSoft eDevelopment: Talent Profile Page (for Employees) or Team Talent Profile Page (for Managers)

    PeopleSoft eProfile Manager Desktop: (Manager and Administrator) Team Snapshot - Recognition and Digital Badges Dashboard
  - Award badges when creating recognitions for team member achievements on the New Recognition Page.

    If a recognition includes a badge, it is indicated in the footer of the recognition. See Recognition - <Everyone or My Peers> Page.
- Employees can view their awarded badges and track accomplishments on the View Digital Badges Page and in Career Snapshot. See:
  PeopleSoft eProfile: Career Snapshot - Recognition and Digital Badges Dashboard

Pages Used to Work with Digital Badges

Page Name	Definition Name	Usage
View and Award Badges Tile	HC_BDG_ADM_VWLST_FL_GBL	Access the View and Award Badges page.

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Page Name	Definition Name	Usage
View and Award Badges Page	BDG_ADM_VWLST_FL	View all awarded badges and grant new badges.
View Recipients Page	BDG_RECIPIENTS_SCF	View the list of individuals who have been awarded the badge.
Give a Badge Page	BDG_ADM_GIVE_FL	Select and award badges to individuals manually.
View Digital Badges Page	BDG_SS_VIEW_LST_FL	View the badges individuals have received.
Badge Details Page	BDG_SS_VIEW_ONE_FL	Review detailed information about the selected badge.
Badge History Page	BDG_SS_HIST_SCF	View additional information about the awarded badge.

View and Award Badges Tile

(Administrator) Use the View and Award Badges tile (HC_BDG_ADM_VWLST_FL_GBL) to access the View and Award Badges page.

Navigation:

The **View and Award Badges** tile is located on the Recognition and Digital Badges dashboard.

This example illustrates the View and Award Badges tile.



Select this tile to access the View and Award Badges Page.

View and Award Badges Page

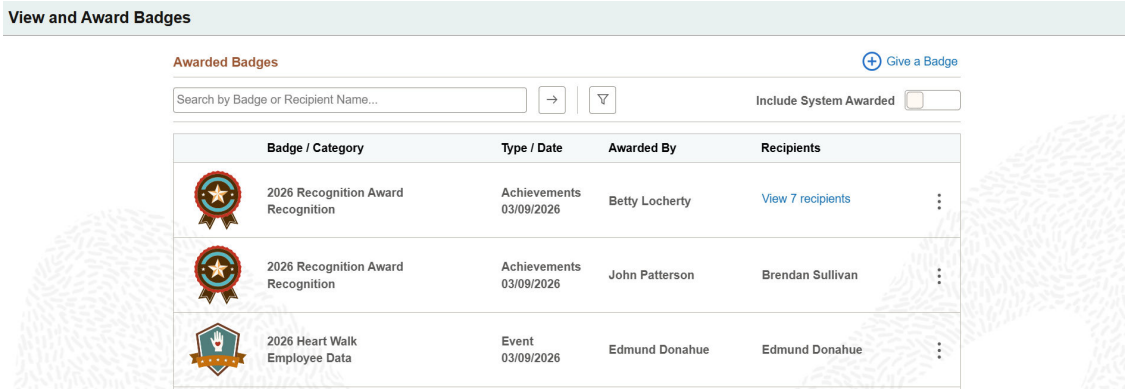
(Administrator) Use the View and Award Badges page (BDG_ADM_VWLST_FL) to view all awarded badges and grant new badges.

Navigation:

Select the **View and Award Badges** tile.

This example illustrates the View and Award Badges page.

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Field or Control	Description
Give a Badge	Select to award badges to employees on the Give a Badge Page.
<search field>	Enter a partial or full badge or recipient name to search for specific badges.
	Select to perform the search.
	Select to specify filter values on the Filters modal page to further refine the search results for badges. Values are: *Custom:* When selected, specify the from and to dates of the custom period. *Last 14 Days* *Last 30 Days* The **Filter** button is displayed in a highlighted color if a filter is applied.
Include System Awarded	Select to include badges automatically awarded via event processing or the AE process (run from the **Run Digital Badge Assignment** page) in the search results. This option is deselected by default.
Recipients	Displays the name of the badge recipient. If the badge has multiple recipients, the **View <total recipient count> Recipients** link appears instead.
View <total recipient count> Recipients	Select this link to see everyone who received the badge on the View Recipients Page. This link appears if the badge was given to more than one individual.

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Field or Control	Description
⋮	Select an action to perform on the corresponding badge. Valid actions include: *View Badge Details:* Select to view more badge information on the Badge Details Page. *Delete Badge:* Select to remove the badge from its recipient (or recipients, if it is a group badge). Users with the *Digital Badges Administrator* role can delete any badge.

View Recipients Page

Use the View Recipients page (BDG_RECIPIENTS_SCF) to view the list of individuals who have been awarded the badge.

Navigation:

Select the **View <total recipient count> Recipients** link on the View and Award Badges page.

This example illustrates the View Recipients page.



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Field or Control	Description
Delete Badge	Select to remove the group badge from individual recipients. **Note:** This option is not available if the group badge is awarded through a recognition. In that case, you can delete the recognition badge for the entire group using the *Delete Badge* action. Recognition group badges cannot be deleted individually.

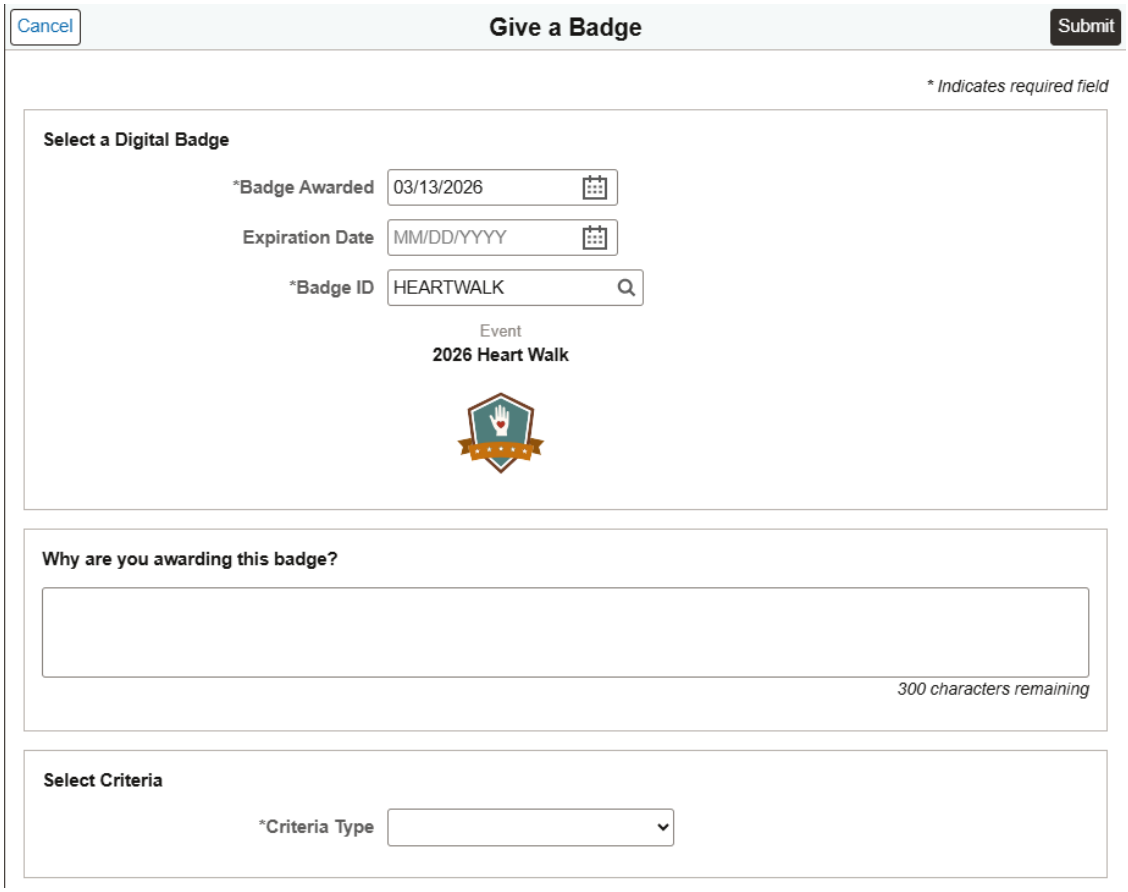
Give a Badge Page

(Administrator) Use the Give a Badge page (BDG_ADM_GIVE_FL) to select and award badges to individuals manually.

Navigation:

Select the **Give a Badge** link on the View and Award Badges page.

This example illustrates the Give a Badge page.



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Select a Digital Badge

Field or Control	Description
Submit	Select this button to submit your badge awarding request. When selected, the system displays a message showing the number of employee entries to be processed based on your input. This number represents how many potential recipients are detected, and may differ from the number of badges actually awarded if the entries include duplicate employee IDs. Select the **Submit** button again to confirm the request. Select the **Cancel** button to return to the Give a Badge page and make changes, if needed.
Badge Awarded	Enter the date to grant the badge to recipients. The awarded badge becomes visible on this date.
Expiration Date	Enter the expiration date for the badge, if needed. After this date, the badge will not be visible on pages where badges are displayed.
Badge ID	Select a badge to grant to the recipients. Active badges are available for selection. If a badge definition has multiple rows, the most current effective-dated active row is used. When selected, the type, name and image of the badge will be displayed.

Why are you awarding this badge?

State a reason for awarding the selected badge. This information will appear in the badge details. Do not include any sensitive or private information.

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Select Criteria

Field or Control	Description
Criteria Type	Specify the method for identifying badge recipients. Values include: *Application Class:* Specify an application class that returns the list of recipients using the fields displayed. This option is available if one or more application classes are set up for the selected badge. *Group ID:* Specify a group ID that returns the list of recipients in the **Group ID** field. *PS Query:* Specify a query that returns the list of recipients. This option is available if one or more queries are set up for the selected badge. *Select Recipients:* Use the **Find Person** link that appears to select badge recipients manually. *Upload Employee File:* Attach a .csv file that lists the employee IDs of badge recipients in one column. Do not include a column header row in the file. See Also Create Digital Badges - Assignment Page.

> **Note**
>
> Customers who wish to exclude contingent workers from badge awards are responsible for creating groups, queries, application classes, or flat files that filter them out.
>
> The person selector used in the *Select Recipients* criteria type can be set up to include or exclude contingent workers on the Configure Simple Person Search page.
>
> Similarly, the direct report setup on the Direct Reports Transaction Configuration page can determine whether contingent workers are included as team members when managers create recognitions with badges.

View Digital Badges Page

Use the View Digital Badges page (BDG_SS_VIEW_LST_FL) to view the badges individuals have received.

Navigation:

- In Directory, select the **Digital Badges** tab in the left panel of the Profile page.
- (Administrator) In View Snapshot with an employee selected, select the **Digital Badges** tile on the Summary dashboard.

  Alternatively, select the **View More** link on the **Digital Badges** tile on the Recognition and Digital Badges dashboard.
- (Manager)

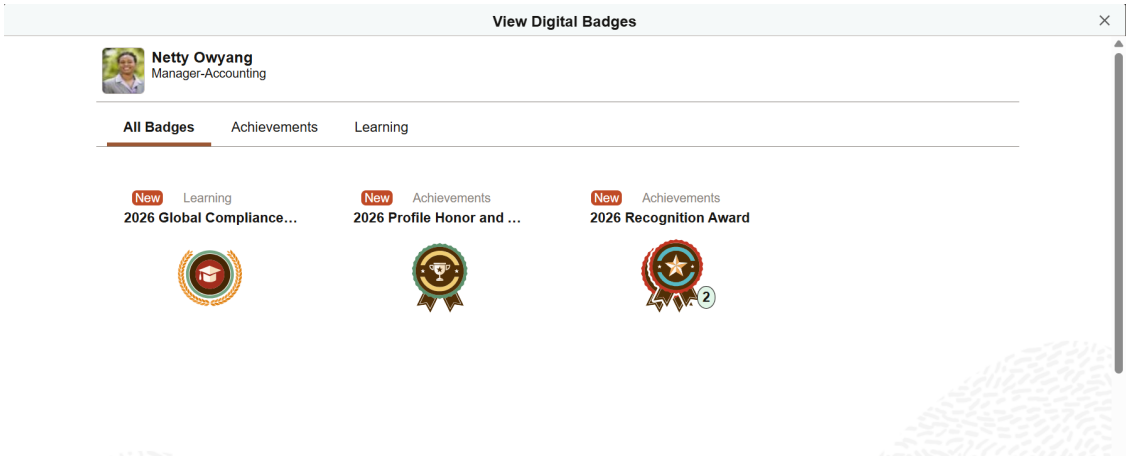
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  - In My Team, select *View Digital Badges* from the **Related Actions** icon of an employee row.
  - In Team Snapshot with an employee selected, select the **Digital Badges** tile on the Summary dashboard.

    Alternatively, select the **View More** link on the **Digital Badges** tile on the Recognition and Digital Badges dashboard.
- (Employee) In Career Snapshot, select the **Digital Badges** tile on the Summary dashboard.

  Alternatively, select the **View More** link on the **Digital Badges** tile on the Recognition and Digital Badges dashboard.

This example illustrates the View Digital Badges page.



The View Digital Badges page is called the Digital Badges page when accessed from Directory.

Badges can be viewed together on the **All Badges** tab or sorted by badge type in separate tabs. Select a badge to view more information on the Badge Details Page.

The **New** tag appears for badges that their recipients have not yet selected to view details and is visible only to them.

If an employee receives the same badge more than once, the badge appears stacked with the total count.

Badge Details Page

Use the Badge Details page (BDG_SS_VIEW_ONE_FL) to review detailed information about the selected badge.

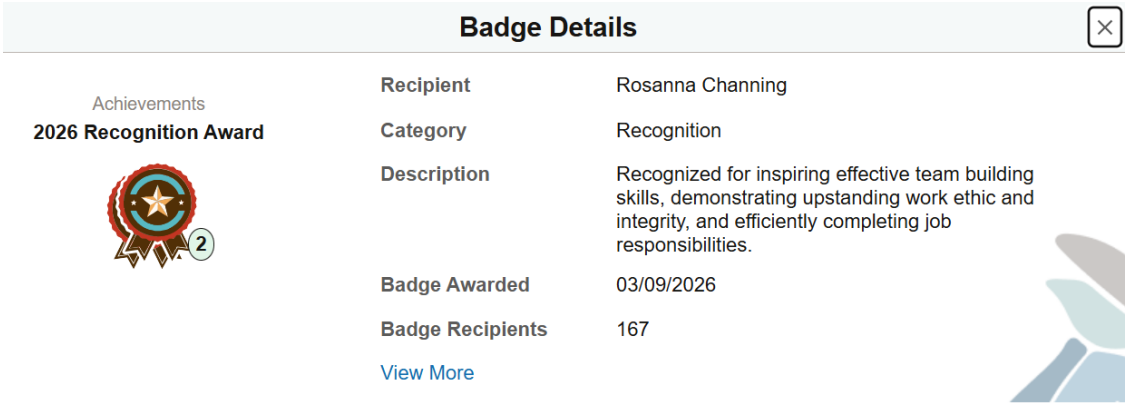
Navigation:

- Select a badge on the View Digital Badges page (or Digital Badges page in Directory).
- (Administrator) Select *View Badge Details* from the **More Actions** menu of a badge on the View and Award Badges page.
- (Manager)

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  - In Team Recognition, select the badge link from a recognition.
  - In Team Talent Profile with an employee selected, select a badge received for a profile item.
- (Employee)
  - In Recognition, select the badge link from a recognition.
  - In Talent Profile, select a badge received for a profile item.

This example illustrates the Badge Details page.



Field or Control	Description
Badge	Displays basic information and image of the awarded badge. (When accessed from Directory, My Team, or Snapshot pages) If a person receives the same badge multiple times, the badge image appears stacked with the total count.
Recipient	Displays the badge recipient name. This field does not appear if you are the badge recipient, or the badge has multiple recipients.
Badge Awarded	Displays the date the badge was awarded. For stacked badges, this date is the most recent badge award date. To view the badge award date for each award instance, select the **View More** link.
Badge Recipients	Displays the number of people who have received the badge to date.
View More	Select this link to access the Badge History Page for additional information about the awarded badge. This link appears if a reason for badging is available or if the badge has been awarded to the recipient multiple times.

Badge History Page

Use the Badge History page (BDG_SS_HIST_SCF) to view additional information about the awarded badge.

Navigation:

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Select the **View More** link on the Badge Details page.

This example illustrates the Badge History page.



The Badge History page displays the reason for the badge if available (either provided by the administrator on the Give a Badge page or copied from the associated recognition). If the recipient has earned the same badge multiple times, each instance is shown in a list.

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(USF) Working With Mass Organization Changes

Understanding Mass Organization Change

Governmental changes and mandates might require making the same organizational change to a large group of your PeopleSoft Human Resources records. For example, an agency restructuring may require that you transfer of a group of employees from the Office of the Director, Budget Division to the Office of the Director, Account Standards Division. Instead of performing this transfer manually, record by record, you can make the changes all at once using the Mass Organization Change functionality.

The Mass Organizational Change processes enable you to make changes based on department and position changes. Using the Mass Organization Changes features, you can:

- Transfer employees into existing departments or positions.
- Create new departments or positions, changing the organizational structure and transfer employees into the new departments or positions.
- Merge employees from multiple departments or positions into new or existing departments and positions.

You perform mass organization changes by defining the changes, setting up any necessary information, and then executing the change. Based upon the definitions you enter, the Mass Organization Change process updates the affected records. This process creates Federal personnel action changes into the system as you defined them. This occurs in the same manner as if you had entered them directly online.

Mass changes affect a large number of rows of data in the system, which makes this a powerful tool. Therefore, you must give careful consideration to selecting the person in your organization who is allowed to perform mass organizational changes.

> **Note**
>
> If you are performing several mass change operations, assign each one a unique mass organization change ID to help you retain and identify all of them. You can group them when you set up your run process. We also recommend breaking down large changes into smaller changes to help reduce error and the burden on the system.

Before You Begin

To perform mass organization changes, you must be familiar with PeopleSoft Tree Manager. This topic assumes that you know how to use PeopleTools Tree Manager.

See *PeopleTools: PeopleSoft Tree Manager*.

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Performing Mass Organizational Changes

These topics discuss how to perform mass organizational changes.

Pages Used to Perform Mass Organizational Changes

Page Name	Definition Name	Usage
Define Changes Page	GVT_MOC_DATA	Define mass changes.
Build Position Structure Page	RUNCTL_ASOFDATE	Run the Build Position Structure SQR (POS006A) to link the positions in the system and create the reporting hierarchy represented in the Indented Position Report.
Build Department Organization Page	RUNCTL_FGHR006	Re-create the departmental hierarchy information for the Departments component, if you made changes to the security tree.
Apply Changes Pages	RUNCTL_GVT_MASSORG	Run the Application Engine process GVT_MASSORG to generate mass organization changes to your system data, based on the information that you entered on the Define Changes page.
Mass Exception Report Page	RUNCTL_FGHR034	Run this report to identify those employees that were in a position or department identified in the processed Mass Organization Change ID but who the system did not process. Modify the records of these employees manually.
OF8 Report Page	RUNCTL_FGOF8	Run this report to track position history and to verify a mass position change.

Performing Mass Organization Changes

To perform mass organization changes for positions:

1. (Optional) Create a new department or position or make changes to an existing department or position.

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Department Organizational Change	Position Organization Change
a. If you are creating a new department, add the new department to the Departments USF component (DEPARTMENT_TBL). **Note:** If you are using tree-based data permission security, don't forget to add the new department to the department security tree and refresh SJT_CLASS_ALL. See (USF) Setting Up Federal Departments. b. If you use tree-based security and are modifying the department security hierarchy, make the changes in PeopleSoft Tree Manager. See Setting Up and Assigning Tree-Based Data Permission.	a. If you are creating a new position, add the new position to the Add/Update Position Info component (POSITION_DATA). See PeopleSoft Human Resources Manage Positions: Creating Positions. b. If you are modifying the position hierarchy, make the changes in PeopleSoft Tree Manager or the organizational structure in the Add/Update Position Info component. **Note:** You can access the Add/Update Position Info component from the HR: Position tree by adding a new node, (to add a new position) or double clicking on an existing node (to update an existing position). See PeopleSoft Human Resources Manage Positions: Maintaining Your Organizational Structure.

2. (Optional) Recreate the hierarchy.

Department Organizational Change	Position Organization Change
If you made changes to the department hierarchy, re-create it by running the Refresh Department Table (FGHR006) process from the Build Department Organization page (RUNCTL_FGHR006).	If you've made changes to the reporting hierarchy, rebuild the position tree or position structure by running the SQR Build Position Structure (POS006A) process from the Build Position Structure page.

3. Define the mass organization change on the Define Changes page (GVT_MOC_DATA).

   Enter the effective date of the change, the action and reason, the nature of action (NOA) and legal authority code or codes and descriptions, and the old and new department or position.

4. Generate mass organization change data.

   Use the Apply Changes page (RUNCTL_GVT_MASSORG) to generate mass organization changes based on the Mass Organization Change data setup. This determines which employees in the departments or positions you identified are affected and inserts new rows of Federal personnel action data.

5. Generate the Mass Org Exception report (FGHR034 SQR) to identify who was in an affected department or position.

   If an employee wasn't processed, modify their records manually.

6. (Position change only) Print the descriptions and/or notices.

   Print the necessary position descriptions using the SQR Process FGOF8. Run a few random reports from this process to test and verify the changes that were performed.

Define Changes Page

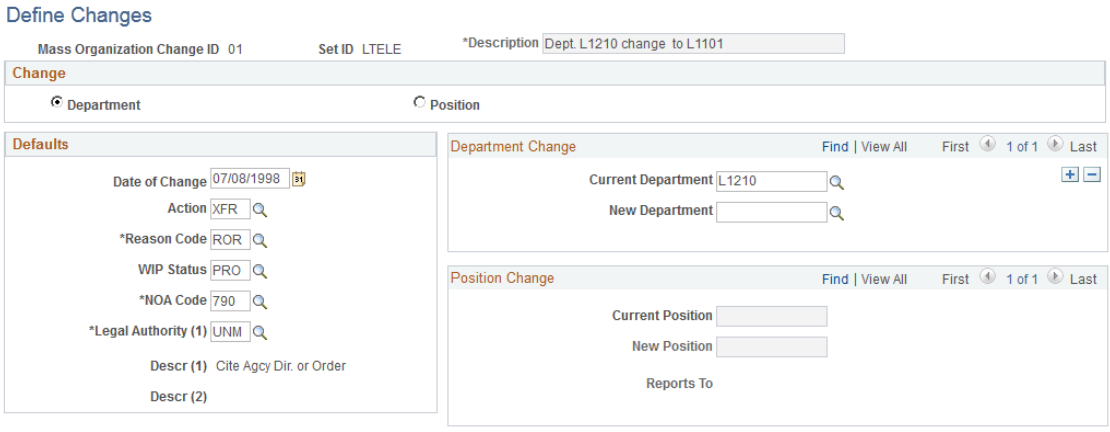
Use the Define Changes page (GVT_MOC_DATA) to define mass changes.

Navigation:

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Workforce Administration, and then **Collective Processes**, and then **Mass Organization Changes USF**, and then **Define Mass Org Changes** , and then **Define Mass Org Changes**

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



Change

Indicate if the change is a department or position change. When you select **Department,** the system makes the fields in the Position Change group box unavailable. When you select **Position,** the system makes the fields in the Department Change group box unavailable.

Defaults

The system inserts the values you enter here into the new job data rows it creates for the employees affected by this mass organization change.

Field or Control	Description
Date of Change	Enter the date the change takes effect. The system uses this date as the effective date on the new Job Data row.
Action and **Reason Code**	Select the action and reason for the change. **Note:** Remember that some actions will set payroll or HR status and/or update employee dates. Review the processing or defaulting that action triggers in the system on the Actions component (ACTION_TBL). See PeopleSoft Human Resources Administer Workforce: Actions Page.
NOA Code (nature of action code), **WIP Status** (work-in-progress status), and **Legal Authority (1)**	Select the NOA code, WIP status, and legal authority (the WIP Status and Legal Authority (1) fields are required). See Nature of Actions USF Page. See Setting Up WIP Status. See Legal Authority Page.

Department Change

You can add more than one row to accommodate changes to a number of departments. If you are merging two departments into one, for example, enter two rows and select one old

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department in one row and the other old department in the other and select the new department they are merging into in the **New Department** field in each row.

Field or Control	Description
Old Department	Enter the name of the department that is being changed.
New Department	Enter the new department name.

Position Change

You can add more than one row to accommodate changes to a number of positions.

Field or Control	Description
Old Position	Enter the old position name.
New Position	Enter the new position name.
Reports To	Enter the position that the new position reports to.

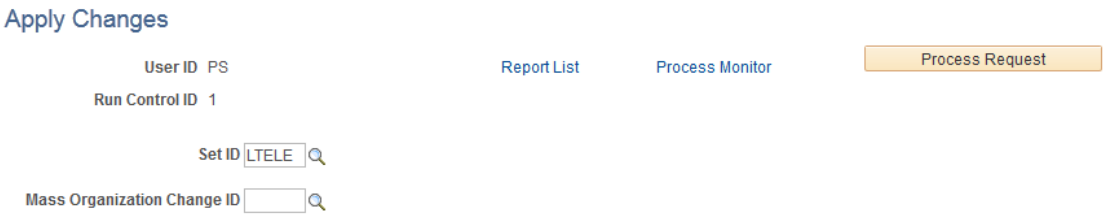
Apply Changes Page

Use the Apply Changes page (RUNCTL_GVT_MASSORG) to run the Application Engine process GVT_MASSORG to generate mass organization changes to your system data, based on the information that you entered on the Define Changes page.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Mass Organization Changes USF**, and then **Apply Mass Organization Change**, and then **Apply Mass Organization Change**

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



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Field or Control	Description
Mass Organization Change ID	Select the ID of the mass organization change that you want to process. You set up mass organization change IDs on the Define Changes page. This process: • Determines the affected employees in the departments or positions identified in the mass organization change ID. • Inserts a new row of Federal personnel action data for each affected employee with the default information selected for the mass change ID. • Generates a PDF file that records the action for each employee. You can access the file using through the Process Monitor link. Review the file to see if there are discrepancies for any rows of data for any of the employees that were updated by the process. You can correct the discrepancies by entering them directly into the Federal HR Processing USF component.

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Working with PeopleSoft Directory Interface for PeopleSoft HCM

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HCM database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

> **Note**
>
> If you have also licensed PeopleSoft Campus Solutions, please refer to the *PeopleSoft Campus Solutions Application Fundamentals,* "Working with PeopleSoft Directory Interface for PeopleSoft Campus Solutions".

Related Topics

- Enterprise Components

Loading Directory Data Using the DSMAPINPUT FullSync Load Process

These topics provide an overview of the directory load processes and discuss how to load directory data.

Pages Used to Load the Directory Using the DSMAPINPUT FullSync Load Process

Page Name	Definition Name	Usage
Directory Load Page	EO_RUNCTL_DS_LOAD	Clean the temporary files and run the Entry Membership process.
Full Data Publish Page	EO_FULLDATAPUB	Load person and job data into the directory.
Monitor Overview Page	IB_MONITOR_OVRVIEW	Review the status of the DSMAPINPUT_FULLSYNC service operation.

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Understanding the Directory Load Process

Once you have set up PeopleSoft Directory Interface you can load the data into the directory using the Directory Load process or the DSMAPINPUT FullSync Load process.

Use the DSMAPINPUT FullSync Load process to load only people and their job data. Use the Directory Load process when you are loading location and department entries in addition to person and job data.

> **Note**
>
> The Directory Load process sometimes experiences performance issues when loading a large volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Load process.

> **Note**
>
> Both the DSMAPINPUT FullSync Load and the Directory Load processes overwrite any existing data in the directory.

Cleaning the Temporary Tables

Run the Clean Temp Tables (DSMAPINPUT) process from the Directory Load page.

1. Specify the appropriate map name and click Run.
2. Select the DS_CLEANTEMP process from the list and click OK.

> **Note**
>
> Do *not* run the Directory Load (EO_DS_AUDIT) process at this time.

Full Data Publish Page

Use the Full Data Publish page (EO_FULLDATAPUB) to load person and job data into the directory.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Initiate Processes**, and then **Full Data Publish**, and then **Full Data Publish**

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC service operation is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The Full Data Publish utility uses the DSMAPINPUT_FULLSYNC service operation and loads multiple streams of emplID data into the directory.

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The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC.*
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

Monitor Overview Page

Use the Monitor Overview page (IB_MONITOR_OVRVIEW) to review the status of the DSMAPINPUT_FULLSYNC service operation.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Services Operations Monitor**, and then **Monitoring**, and then **Asynchronous Services**, and then **Monitor Overview**

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC service operation within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page of the Asynchronous Services component.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Directory Load Page

Use the Directory Load page (EO_RUNCTL_DS_LOAD) to clean the temporary files and run the Entry Membership process.

Navigation:

Enterprise Components, and then **Directory Interface**, and then **Load Directory**, and then **Directory Load**

After verifying on the Monitor Overview page that all message subscriptions are complete, run the Entry Membership (DSMAPINPUT) process to load members into directory groups based on the Entry Membership Rules.

1. Access the Directory Load page.
2. Specify the appropriate map and click Run.
3. Choose the DS_ENTRY process and click OK.

> **Note**
>
> Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

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Auditing Directory Data Using the DSMAPINPUT FullSync Process

These topics provide an overview of the directory auditing processes and discuss how to audit directory data.

Pages Used to Audit the Directory Using the DSMAPINPUT FullSync Audit Process

Page Name	Definition Name	Usage
Directory Audit Page	EO_RUNCTL_DS_AUDIT	Clean and load the temporary files. Also, load members into directory groups using entry membership rules and merge contents of multiple LDIF files into a single file.
Full Data Publish Page	EO_FULLDATAPUB	Set rules to publish the DSMAPINPUT_FULLSYNC_A service operation.
Monitor Overview Page	IB_MONITOR_OVRVIEW	Review the status of the DSMAPINPUT_FULLSYNC_A service operation.

Understanding the Directory Audit Process

Once you have loaded data into the directory and started processing transactions, you can regularly run the Directory Audit process or DSMAPINPUT FullSync Audit process to compare the data in the database to that in the directory.

Use the DSMAPINPUT FullSync Audit process to audit only people and their job data. Use the Directory Load process when you are auditing data that includes location and department entries in addition to person and job data.

> **Note**
>
> The Directory Audit process sometimes experiences performance issues when loading a auditing volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Audit process.

Cleaning and Loading the Temporary Tables

Run the Clean Temp and Load from Dir (EODS_CLEANLD) process from the Directory Audit page.

1. Specify the appropriate map name and click Run.
2. Select the EODS_CLEANLD process from the list and click OK.

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> **Note**
>
> Do *not* run the Directory Load (EO_DS_AUDIT) process.

Full Data Publish Page

Use the Full Data Publish page (EO_FULLDATAPUB) to set rules to publish the DSMAPINPUT_FULLSYNC_A service operation.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Initiate Processes**, and then **Full Data Publish**

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC_A is a FullSync service operation that is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The queue is partitioned on the emplID field to enable parallel processing. The Full Data Publish utility publishes the service operation. The subscription utility processes multiple streams of emplID data simultaneously. Each subscription produces a unique LDIF file containing LDAP commands for a range of people.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC_A.*
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

> **Note**
>
> You can choose to use your own service operation instead of DSMAPINPUT_FULLSYNC_A but you must add FULLSYNC_A to the name of the service operation from the directory map. For example, if PERSMSG is a configured service operation specified on the map for person entries, name the service operation PERSMSG_FULLSYNC_A.

Monitor Overview Page

Use the Monitor Overview page (IB_MONITOR_OVRVIEW) to review the status of the DSMAPINPUT_FULLSYNC_A service operation.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Services Operations Monitor**, and then **Monitoring**, and then **Asynchronous Services**, and then **Monitor Overview**

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Monitor the service operation queue to determine the status of the DSMAPINPUT_FULLSYNC_A message within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Directory Audit Page

Use the Directory Audit page (EO_RUNCTL_DS_AUDIT) to clean and load the temporary files. Also, load members into directory groups using entry membership rules and merge contents of multiple LDIF files into a single file.

Navigation:

Enterprise Components, and then **Directory Interface**, and then **Run Directory Audit**, and then **Directory Audit**

After verifying on the Monitor Overview page that all service operation subscriptions are complete, run the Entry Membership and LDIF Merge (EODS_LDIFMRG) process to load members into directory groups based on the Entry Membership Rules and to merge the contents of all the LDIF files that were generated during the full table publish. You can review the merged file later, modify the contents, and import them into the directory later.

To run the Entry Membership and LDIF Merge process:

1. Access the Directory Audit page.
2. Specify the appropriate map and click Run.
3. Choose the EODS_LDIFMRG process and click OK.

> **Note**
>
> Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Using PeopleSoft Directory Interface with HCM

These topics discuss how to:

- Access sample mappings and delivered service operations.
- Use sample mappings.
- Review delivered service operations.

Accessing Sample Mappings and Delivered Service Operations

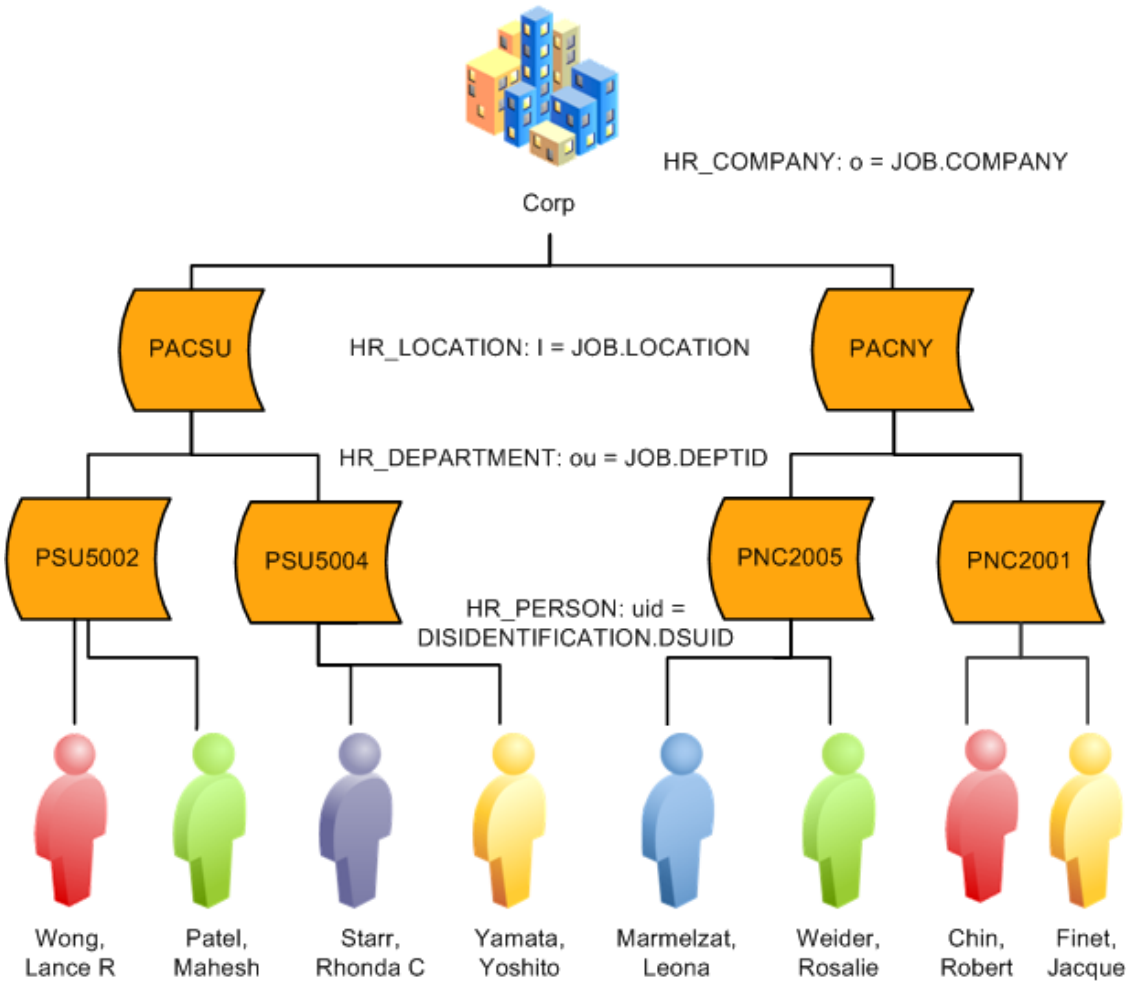
If you have licensed PeopleSoft Directory Interface for HCM, PeopleSoft provides you with sample mappings and service operations for HCM.

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Using Sample Mappings

To use sample mappings that PeopleSoft delivers, establish directory IDs in the Directory Configurations component (PSDSSETUP) and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

We developed the sample mappings assuming that you are using the tree structure illustrated below, which is HR_PERSONs reporting to HR_DEPARTMENT, the departments are associated to the HR_LOCATION, which report to the corporate level, or HR_COMPANY:



> **Note**
>
> PeopleSoft delivers HR_LOCATION, HR_DEPARTMENT, and HR_PERSON as sample mappings

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Reviewing Delivered Service Operations

The following topics describe the delivered sample service operations and PeopleCode functions that are related to your directory mappings.

Directory Interface Service Operations

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Service Operation Name	Directory Entry
DSLOCATION_SYNC	Location Entry (syncs entire record)
DSLOCATION_SYNC_EFF	Location Entry (syncs current row)
DSDEPT_SYNC	Department Entry (syncs entire record)
DSDEPT_SYNC_EFF	Department Entry (syncs current row)
DSWORKFORCE_SYNC	Job Entry (syncs entire record)
DSWORKFORCE_SYNC_EFF	Job Entry (syncs current row)
DSPERSON_BASIC_SYNC	Person Entry (syncs entire record)
DSPERSON_BASIC_SYNC_EFF	Person Entry (syncs current row)

> **Note**
>
> The Directory Interface engine, using the message level HCDI_SERVICES:HCDIUtilities.runPOIandIdentifictn, populates the DSIDENTIFICTN table with HCM values that you can use for creating directory interface maps. For example, it generates a Universal Unique Identifier string and stores it in DSIDENTIFICTN.DSUUID and a default Unique Identifier, stored in DSIDENTIFICTN.DSUID. The default unique identifier defaults to the current person's email address, or, if blank, to the First Name + Last Name.
>
> The UID field is limited to fifty characters. The system truncates the person's name if it exceeds fifty characters.

See *PeopleTools PeopleSoft Integration Broker*

DSMAPINPUT Message

The DSMAPINPUT service operation, which corresponds to Directory Input, is a sample service operation that combines a person's job and personal data into one service operation. The DSWORKFORCE_SYNC mservice operation publishes person's job information. The DSPERSON_BASIC_SYNC service operation publishes a person's personal information.

In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the service operation is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT service operation with the employee's job and personal data. This enables you to map job and personal data for one service operation to one directory entry.

BuildMappingMessage Syntax

The BuildMappingMessage function populates a service operation with data that is stored in another service operation and with data from the local database. After populating the service

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operation from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the original published service operation, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map
name])
```

The function performs the following tasks:

- Copies data in the same record from the input service operation into the output service operation.
- Searches for empty records in the output service operation.
- Examines data in the service operation for key values for empty records.
- If it finds key values for empty records, populates empty records in the output service operation by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name. Otherwise, calls the mapping function for each map referencing the output service operation.

The BuildMappingMessage is found in the application package and class that is associated with handler of the _EFF service operation. For example, you can find the BuildMappingMessage for the DSLOCATION_SYNC_EFF service operation in the DSMappingSub application class, which is part of DSLOCATION_SYNC_EFF application package. The BuildMappingMessage code is in the FUNCLIB_EO_DS derived record, DSMAPMESSAGE field, FieldFormula event.

Parameters

Name	*Type*	*Description*
input service operation	Message	Pass the message containing the originally published data.
output service operation	String	Specify the name of the message to be created, populated, and passed to the mapping function.
online flag	Boolean	Set to *true* if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

An example:

```
Local Message &MsgIn;


BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```


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Working with Integration Points in HCM

Identifying Integrations for Your Implementation

PeopleSoft uses PeopleSoft Integration Broker to integrate HCM applications with:

- Other PeopleSoft HCM applications inside of the database (local integrations).
- PeopleSoft applications outside of HCM.
- Third-party applications.

Use the Interactive Services Repository (ISR) on My Oracle Support to identify the integrations that you need for your implementation. Documentation provided with the ISR application on My Oracle Support provides instructions for using search pages to query the repository using a variety of criteria:

- By integration point name.
- By product.
- Integrations between products.
- By business process.
- By integration technology.
- Using an advanced search page.

  The advanced search page enables you to combine the individual search criteria into a single search.

Click an integration point in the search results to see its details.

See My Oracle Support, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository.

See The "Interactive Services Repository" PDF instructions on My Oracle Support, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository

Activating Service Operations and Queues

Integration messages are connected to service operations, which are delivered inactive. You must activate the service operations that your organization uses.

In the **PeopleTools**, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations** component:

- Verify or select the Active status for the service operation on the General page.
- Verify or select the correct routing status on the General page.
- Activate the appropriate handlers and associated application classes on the Handlers page.

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- Activate the correct routing on the Routings page.

In the **PeopleTools, Integration Broker, Integration Setup, Queues** component, set the status of the corresponding service operation queue to *Run.*

> **Note**
>
> You must also configure Integration Broker.

See *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Related Topics

- Enterprise Components

Working with HCM Local Integrations

The system uses a local to local integration when the database that does the publish also has a handler and associated application class on the service operation that triggers other processing within that database.

Setup Requirements

When using local integrations, you must configure only the local node, but the application server must be running both the publish and subscribe servers. The local gateway and node must be properly configured. For local to local integrations, you must activate the asynchronous routing within the local node (local to local).

This table lists the local to local service operations in alphabetical order:

Service Operation	Service Operation	Service Operation
ACCOUNT_CHARTFIELD_FULL SYNC	EP_REVW_RATING	PSXP_CLEANATTR
ACTUAL_TIME_ADD	EP_SUB_COMP	PSXP_RATTR
ACTUAL_TIME_BATCH_ADD	EP_SUB_DEV	PTAF_MASS_APPROVALS
AWARD_GRANT_ISSUE	EP_SUB_PROF	PUNCHED_TIME_ADD
BUDGET_POSITION_FULLSYNC	EP_SUB_WRT	QAS_CRASH_MSG
BUS_UNIT_FS_FULLSYNC	ESTIMATED_TIME_BATCH_AD D	ROLE_MAINT
BUS_UNIT_FS_SYNC	FUND_LOAD	TIME_DEVICE_EMPL_ATT_FUL LSYNC
BUS_UNIT_GL_FULLSYNC	GP_POST_GL	TIME_DEVICE_EMPL_ATT_SYN C
BUS_UNIT_GL_SYNC	GRANT_AWARD_UPDATE	TIME_DEVICE_PER_HRS_FULLS YNC
COUNTRY_FULLSYNC	HCR_EM_EVENT	TIME_DEVICE_PROFILES_FULL SYNC
COUNTRY_SYNC	HCR_EM_EVENT_QUEUE_1	TIME_DEVICE_RESTRICT_FULL SYNC
DEPBEN_SYNC	HCR_EM_EVENT_QUEUE_2	TIME_DEVICE_RPTG_CODE_FU LLSYNC

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Service Operation	Service Operation	Service Operation
DEPT_FULLSYNC	HCR_EM_EVENT_QUEUE_3	TIME_DEVICE_RPT_ELMNT_FULLSYNC
DEPT_FULLSYNC_EFF	HIRE_REQUEST	TIME_DEVICE_SCHEDULE_FULLSYNC
DEPT_SYNC	HR_ACCT_CD_LOAD	TIME_DEVICE_SUPERVSOR_FULLSYNC
DEPT_SYNC_EFF	HR_CHARTFLD_COMBO_SYNC	TIME_DEVICE_TASK_VALS_FULLSYNC
DETAIL_CALENDAR_FULLSYNC	JOURNAL_GEN_APPL_ID_FULLSYNC	TIME_DEVICE_TEMPLATES_FULLSYNC
ELAPSED_TIME_ADD	LOCATION_SYNC	TIME_REPORTING_CODE_FULLSYNC
EP_CHK_SUG	PAYMENT_ERECRUIT_ACKNOWLEDGE	TREE_CHANGE
EP_CHK_WRD	PAYMENT_ERECRUIT_ISSUED	UOM_FULLSYNC
EP_COMPETENCY	PAYMENT_ERECRUIT_REQUEST	UOM_SYNC
EP_COMP_DEV	PERSON_ERN_DELETE	USER_PROFILE
EP_COMP_PROF	POST_HIRE_REQUEST	VAR_COMP_PAYMENT_ACKNOWLEDGE
EP_DEV_TIP	PRODUCT_CHARTFIELD_FULLSYNC	WORKFORCE_FULLSYNC
EP_JPM_CAT_ITEMS	PRODUCT_CHARTFIELD_SYNC	WORKFORCE_SYNC
EP_JPM_CAT_ITEM_RD	PROJECT_ACTIVITY_FULLSYNC	WP_PSHARING_MSG
EP_JPM_CAT_I_RLAT	PROJECT_FULLSYNC	
EP_RATING_MDL	PSXP_ARCHATTR	

See *PeopleTools Integration Broker*.

Working with Other HCM Integrations

Integrations that support particular business processes are documented throughout PeopleSoft HCM documentation.

This table provides references to integration information in HCM documentation:

Product Documentation	Reference
PeopleSoft Global Payroll	See PeopleSoft Global Payroll: Understanding the General Ledger Interface.
PeopleSoft Global Payroll	See PeopleSoft Global Payroll: Understanding Variable Compensation Awards.
PeopleSoft HR: Manage Professional Compliance	See PeopleSoft Human Resources Manage Professional Compliance: Understanding Manage Professional Compliance Business Processes.

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Product Documentation	Reference
PeopleSoft HR: Manage Variable Compensation	See PeopleSoft Human Resources Manage Variable Compensation: Approving and Submitting Awards.
PeopleSoft Payroll for North America	See PeopleSoft Payroll for North America: Understanding the Interface with Time and Labor.
PeopleSoft Payroll for North America	See PeopleSoft Payroll for North America: Understanding Integration with PeopleSoft HR and Expenses.
PeopleSoft Payroll for North America	See PeopleSoft Global Payroll: Understanding the General Ledger Interface.
PeopleSoft Payroll for North America	See PeopleSoft Payroll for North America: Understanding the Interface with Payables.
PeopleSoft Stock Administration	See PeopleSoft Stock Administration: Variable Compensation Integration.
PeopleSoft Talent Acquisition Manager	See PeopleSoft Talent Acquisition Manager: Understanding the Employee Referral Program Process.
PeopleSoft Time and Labor	See PeopleSoft Time and Labor: Receiving Time from a TCD.
PeopleSoft Time and Labor	See PeopleSoft Time and Labor: Understanding Integration.
PeopleSoft Time and Labor	See PeopleSoft Time and Labor: Understanding the TCD Interface.
PeopleSoft Time and Labor	See PeopleSoft Time and Labor: Understanding the TCD Interface.

Note

To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository in the Implementation Guide section of My Oracle Support.

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Integrating with Clairvia

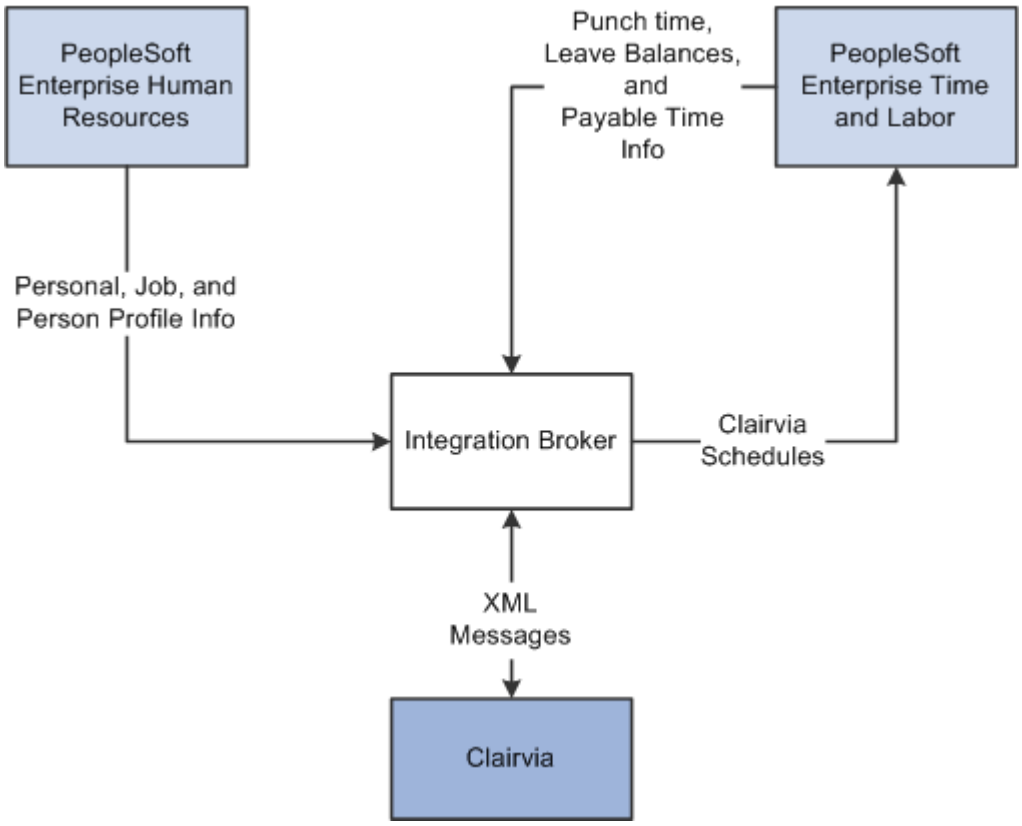
Understanding Integration with Clairvia

Clairvia automates staffing deployment based on specific care and workload demands to attain the best clinical and financial result. Clairvia capabilities include web-based employee self service dashboard, productivity measurement, scheduling and staffing, and real-time decision for complete control over staffing resources for an organization.

PeopleSoft Time and Labor facilitates the management of time reporting and time approval, as well as the creation and use of schedules. The scheduling module enables customers to create and maintain schedules and to communicate work expectations, track adherence, and reconcile the actual work completed.

PeopleSoft HCM integrates with Clairvia through the PeopleSoft Integration Broker (IB), which is a messaging system that enables you to synchronize data from one application or system with another. PeopleSoft Integration Broker facilitates synchronous and asynchronous messaging among internal systems and trading partners, while managing message structure, message format, and transport disparities.

The following diagram illustrates the flow of information between PeopleSoft HCM applications and Clairvia:



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When PeopleSoft HCM products and Clairvia are integrated, the following information is exchanged asynchronously between the applications:

- PeopleSoft Human Resources sends employee personal, job, and person profile information to Clairvia.
- PeopleSoft Time and Labor sends employee reported punch time, leave balances, and payable time to Clairvia.
- Clairvia sends employee work schedule and scheduled leave information back to Time and Labor.

> **Note**
>
> The reported leave time and leave balance information is obtained from Time and Labor though integration with HR Base Benefits. Absence Management is not required for this integration.

The system publishes PeopleSoft Human Resources messages in real-time to Clairvia when any of the following transactions occur:

- Add a person and job (New Hire).
- Add an employment instance to an existing person.
- Add an employment instance to an existing employee (multiple jobs).
- Add or update a person profile for competencies, licenses, etc.
- End an employment instance for an existing Person (Termination).
- Update an employment instance for an existing Person (Transfer).

Administering Integration Broker and Enterprise Components with Clairvia

PeopleSoft Integration Broker facilitates integrations with PeopleSoft and third-party systems. It features a services-oriented architecture that enables you to expose PeopleSoft business logic to PeopleSoft and third-party systems as services. It also allows you to consume and invoke services from other PeopleSoft and third-party systems. The PeopleSoft Integration Broker manages message structure, message content, and transport disparities between systems.

This topic only discusses the configuration necessary to enable Integration Broker to send messages between the PeopleSoft applications and Clairvia.

See *PeopleTools Integration Broker Administration*

These topics discuss how to administer Integration Broker and Enterprise Components with Clairvia.

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Pages Used to Administer Integration Broker and Enterprise Components with Clairvia

Page Name	Definition Name	Usage
Full Table Publish Rules Page	EOIU_SOPUBFULL	Associate a rule to a message and characterize the rule.
Full Data Publish Page	EO_FULLDATAPUB	Create the run control for the Full Data Publish utility.

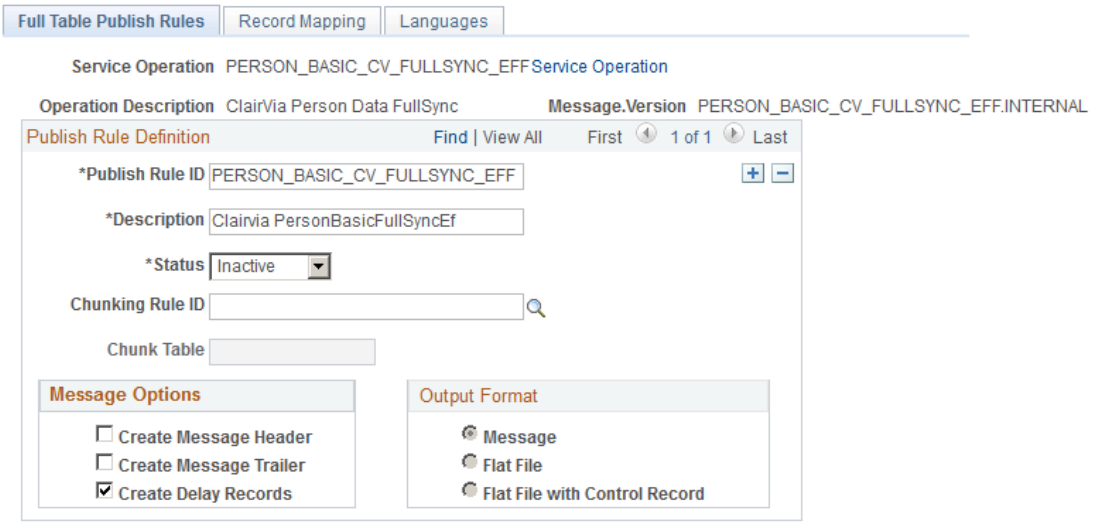
Full Table Publish Rules Page

Use the Full Table Publish Rules page (EOIU_SOPUBFULL) to associate a rule to a message and characterize the rule.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Full Data Publish Rules**

This example illustrates the fields and controls on the Full Table Publish Rules page. You can find definitions for the fields and controls later on this page.



All PeopleSoft applications use common, centralized tables and pages to define how to publish full table messages. The Publish utility uses full table publish rules to process the data. For integration with Clairvia, you must set the Publish Rule Definition Status to Active for the following messages:

- PERSON_BASIC_CV_FULLSYNC_EFF
- JPM_JP_CV_FULLSYNC_EFF
- WORKFORCE_CV_FULLSYNC

See *PeopleTools: Portal Technology*.

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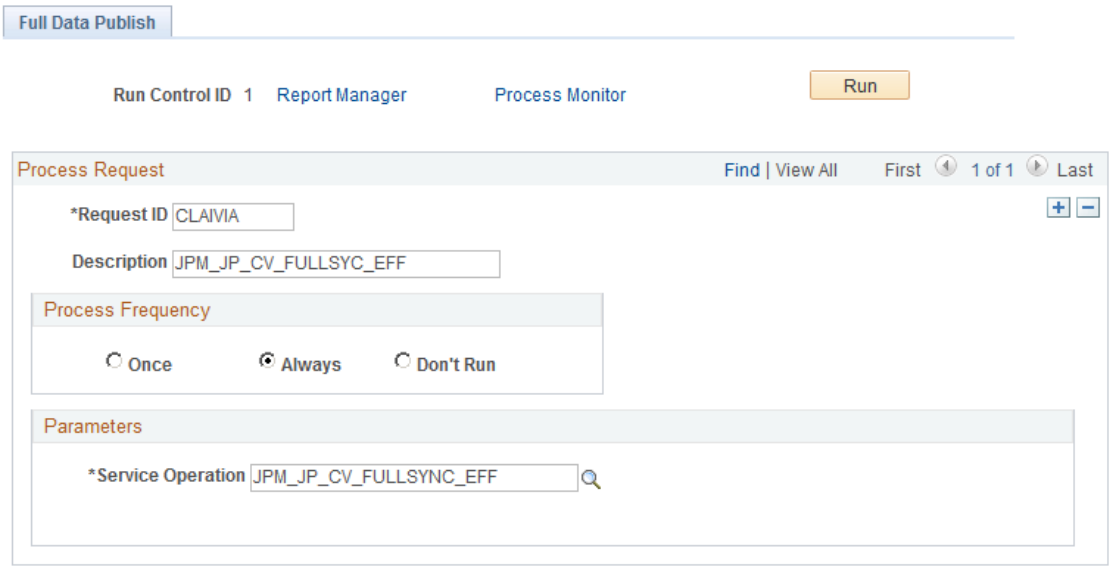
Full Data Publish Page

Use the Full Data Publish page (EO_FULLDATAPUB) to create the run control for the Full Data Publish utility.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Initiate Processes**, and then **Full Data Publish**

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



You must run the Full Data Publish process two times when you initially integrate with Clairvia:

1. Run this process for the DEPT_FULLSYNC, JOBCODE_FULLSYNC, JPM_CAT_FULLSYNC, and POSITION_FULLSYNC messages.
2. After you enter employee data and indicate which employees are integrated with Clairvia, run this process again for the PERSON_BASIC_CV_FULLSYNC_EFF, WORKFORCE_CV_FULLSYNC, and JPM_JP_CV_FULLSYNC_EFF messages.

See Administering PeopleSoft Human Resources Integration with Clairvia.

Setting Up PeopleSoft Integration with Clairvia

In order to share PeopleSoft Human Resources information with Clairvia, you must specify that Clairvia is installed and that an employee and employee record combination are enrolled in Clairvia. Time and Labor requires that you specify whether a manager can override Clairvia schedules and select default values.

These topics discuss how to

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Pages Used to Set Up PeopleSoft Integration with Clairvia

Page Name	Definition Name	Usage
Installed Integration Products Page	INSTALL_PIP_SEC	Specify that Clairvia is installed.
JPM Catalog Details Page (see Defining the Published Content Types)	INSTALL_CATTYP_SEC	Define which content types to publish to Clairvia.
Employment Information Page (see Updating Job Data)	EMPLOYMENT_DTA1	Enroll the selected employee in Clairvia.
Configurations Page (see Adding Options and Default Values for Clairvia)	TL_INSTL_PUNCH	Set up schedule total options, schedule resolution options, and punch pattern defaults for your Time and Labor application.

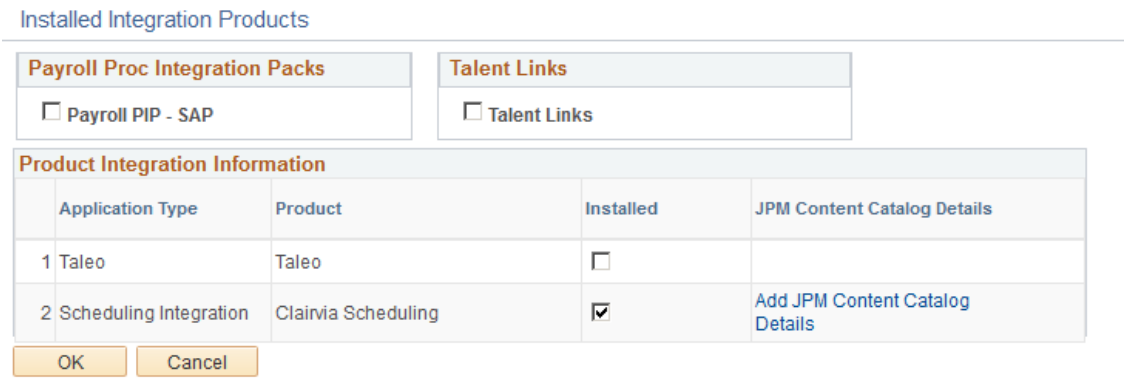
Installed Integration Products Page

Use the Installed Integration Products page (INSTALL_PIP_SEC) to specify that Clairvia is installed.

Navigation:

Set Up HCM, and then **Install**, and then **Installation Table**, and then **Installed Integration Products**

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



Field or Control	Description
Application Type	This field shows the type of application that is being integrated. *Scheduling* is the default value.
Product	Select the product you want to use for integration. *Clairvia* is the default value.

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Field or Control	Description
Installed	Select to indicate the installation of an application type and product combination. The default value is deselected.

Defining the Published Content Types

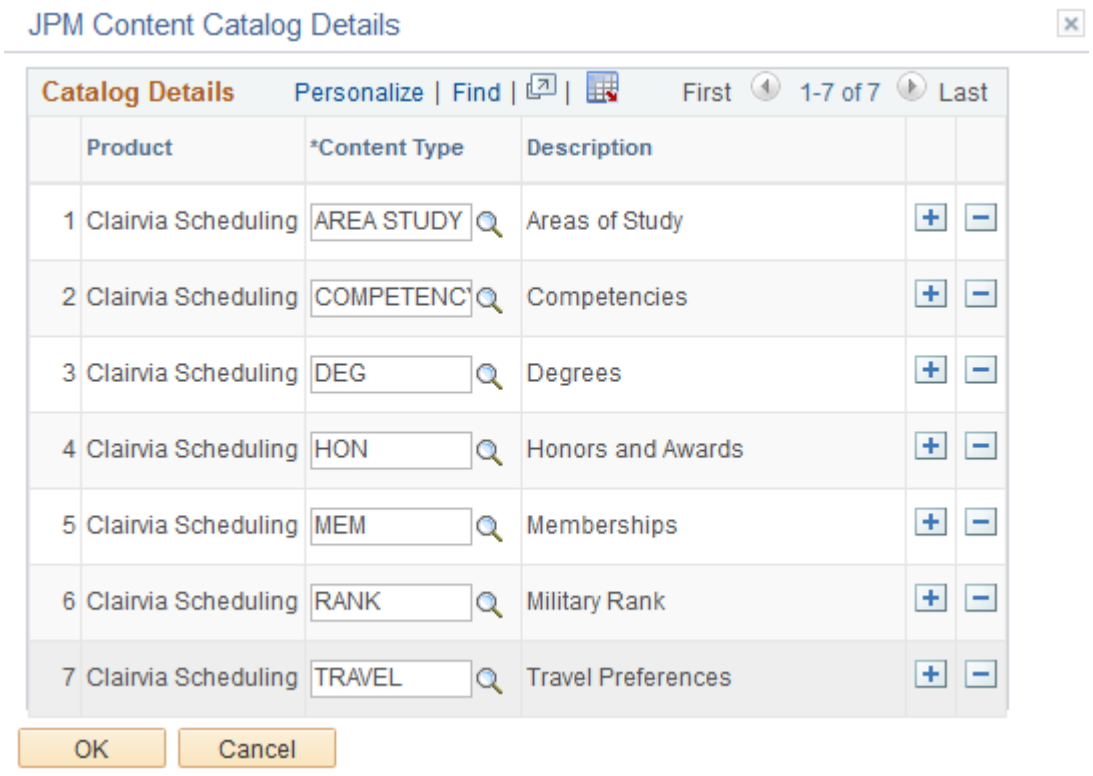
The system enables you to control the content types published to Clairvia, based on the primary person profile type defined on the Assign Profile Type Defaults page. Use the JPM Catalog Details page to select the content types published to Clairvia.

Use the JPM Catalog Details page (INSTALL_CATTYP_SEC) to define which content types to publish to Clairvia.

Navigation:

Click the **Add JPM Content Catalog Details** link on the Installed Integration Products page.

This example illustrates the fields and controls on the JPM Content Catalog Details page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Content Type	Select the Profile Management content type to publish to Clairvia.

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Updating Job Data

In order to send information to Clairvia, you must select the Clairvia field in the Product Integration Information region of the Job Data component for each Clairvia employee.

Use the Employment Information page (EMPLOYMENT_DTA1) to enroll the selected employee in Clairvia.

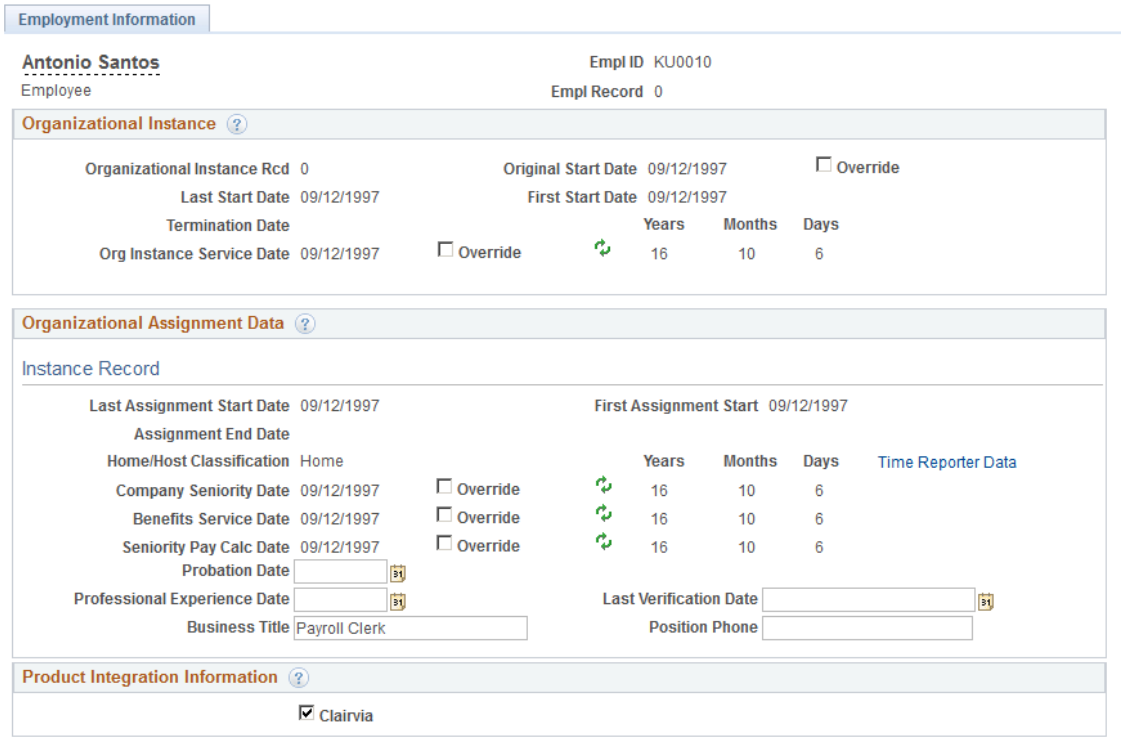
Navigation:

Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component:

Workforce Administration, and then **Job Information**, and then **Job Data**

Workforce Administration, and then **Job Information**, and then **Current Job**

This example illustrates the fields and controls on the Employment Information page, showing the Product Integration Information group box.



Field or Control	Description
Clairvia	Select to enroll the employee in Clairvia.

Since basic HCM data flows only from PeopleSoft to Clairvia, you must add new employees to PeopleSoft before adding them to Clairvia.

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Adding Options and Default Values for Clairvia

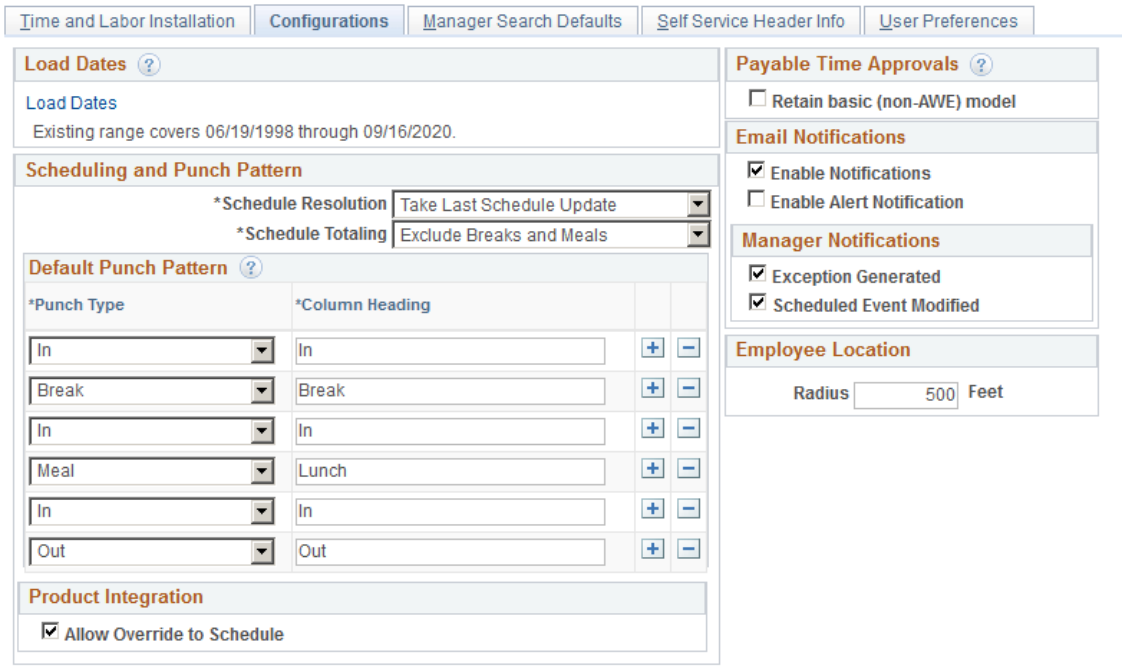
You can specify whether a manager can override the schedules sent from Clairvia. Enabling schedule overrides allows a manager to make ad hoc changes to schedules and create personal schedules for specific employees.

Use the Configurations page (TL_INSTL_PUNCH) to set up schedule total options, schedule resolution options, and punch pattern defaults for your Time and Labor application.

Navigation:

Set Up HCM, and then **Install**, and then **Product Specific**, and then **Time and Labor**, and then **Configurations**

This example illustrates the fields and controls on the Configurations page, showing the Product Integration group box. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Allow Override to Schedule	Select to enable a manager to change or override a Clairvia schedule for the employee and employee record combination on the Manage Schedules page. Deselect this field to prevent manager overrides of Clairvia schedules on the Manage Schedules page.

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Administering PeopleSoft Human Resources Integration with Clairvia

PeopleSoft Human Resources publishes an employee's personal, job, and person profile information to Clairvia. The system uses application messaging to publish the information to Clairvia through PeopleSoft Integration Broker messaging.

Initial Set Up Synchronization

When you establish the integration between your PeopleSoft system and Clairvia, Oracle recommends that you perform the following steps:

1. Run the Full Data Publish process for the following messages:
   - DEPT_FULLSYNC
   - JOBCODE_FULLSYNC
   - JPM_CAT_FULLSYNC
   - POSITION_FULLSYNC
2. Enroll the existing employees in your PeopleSoft system into Clairvia using the Job Data page or using the ADD_CLAIRVIA_EMPLOYEES DataMover script provided by Oracle.

   The ADD_CLAIRVIA_EMPLOYEES PeopleTools DataMover script enables you to add the initial employee and employee record instances that you want to integrate with Clairvia at one time. You modify the DataMover script to include the employee information for the desired employees, and then initiate the DataMover process to insert the employee information into the PS_PER_ORG_ASG_INT integration table.

   For example, assume your hospital has 3,000 nurses that you wish to enroll in Clairvia. Rather than manually updating the Job Data for each of those employees, use the ADD_CLAIRVIA_EMPLOYEES DataMover script to complete a mass enrollment of the employees.
3. Run the Full Data Publish process again, to send any enrolled employee data from your PeopleSoft system to Clairvia.

   Run the process for the following messages:
   - PERSON_BASIC_CV_FULLSYNC_EFF
   - WORKFORCE_CV_FULLSYNC
   - JPM_JP_CV_FULLSYNC_EFF

Data Published to Clairvia

When any of the fields required by Clairvia in the Personal, Job, and Profile contributing components are updated, the following messages are published to Clairvia:

- PERSON_BASIC_CV_SYNC_EFF
- WORKFORCE_CV_SYNC
- JPM_JP_CV_SYNC_EFF

The system publishes the messages to the Clairvia node after removing any future-dated and history rows using the Enterprise Components method Process Effdt Msg, for Person and HR

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Manage Profiles data. Clairvia only accepts current effective-dated information for these messages. Future-dated rows are published using the Enterprise Components Effective Dated Publish utility.

Clairvia accepts all historic, current and future dated messages for job related information

Clairvia does not integrate with organizational-related setup tables such as Business Unit, and Location, as well as other setup tables for Job Profile Management such as Rating Model, School, School Type and Major. If no integration point exists between PeopleSoft and Clairvia, you must manually map any desired setup table data. For subsequent change to a PeopleSoft table value, you must manually update the information in the Clairvia system. For example: adding a new location.

The following table describes the Clairvia fields and the corresponding Human Resources field data that is sent to Clairvia:

Clairvia Field Name	Clairvia Description	PeopleSoft Field Name
ProfileID/CostCenter	Links Employee to a Profile	DEPTID (External Dept ID)
EmployeeID	Employee's ID	EmplID
FirstName	Employee's first name	First Name
LastName	Employee's last name	Last Name
Initial/MI	Employee's middle initial	Middle Name
Email	Employee's email address	Email_Addr
HireDate	The date on which the employee was hired. For example: 19960702 for July 2, 1996	Orig Start Date, Last Start Date
BirthDate	The date on which the employee was born. For example: 19730202 for February 2, 1973	Birth Date
Street/Address	Employee's street address	Address Line 1
Apt	Employee's apartment address	Address Line 2
City	City in which the employee lives	City
State/Province/Region	State in which the employee lives	State
ZIP/Postal Code	Employee's ZIP code	Postal Code
Country	Country in which the employee lives	Country
Period*	The type of period for employee hours, shifts, point and pay limits 0 - None, 1 - Day, 2 - Week, 3 - Month, 4 - Years, 5 - Bi Weekly	Work Period
HoursPerPeriod	The max. no. of hours to be worked per period	Standard Hours
MinPeriod	Type of period for Employee minimum limit. 0 - None, 1 - Day, 2 - Week, 3 - Month, 4 - Years, 5 - Bi Weekly	Work Period
Skill/JobCode	Maps Job code to skill code	Job Code

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Clairvia Field Name	Clairvia Description	PeopleSoft Field Name
HourRate	Rate per hour	Hourly Rate
DeptID	Employee Department ID	DEPTID (External Dept ID)
FTE	Employee FTE status	FTE
EmpAction	Employee action: 1-Transfer; 2 - Terminate; 3 - Change in Job	Action Action_Descr
ActionStartDate	The date on which the employee action starts. For example: 19730202 for February 2, 1973	Effective Date Termination Date
PhoneType	Employee phone type: 1-HomeNum, 2-WorkNum, 3-PageNum, 4-OtherNum	Phone Type
PhoneNumber	Employee phone number. Uses format: 1234567890	Phone
CompetencyName	Competency name	Content Type
CompetencyValue	Competency value	Content Items
CompetencyExpDate	Date on which the competency expires	Expiration Date
Years of Experience		Years of Exp
Seniority Date		Company Seniority Date or Union Seniority Date
Start Date		Start Date LST_ASGN_START_DT
Job Type	Primary, Secondary	Job Indicator

Human Resources Messages Design Overview

This topic provides an overview of the message design for many of the sync and full-sync Integration Broker messages generated for Human Resources.

PERSON_BASIC_CV_FULLSYNC_EFF Message Design

For the Person Basic Clairvia FullSync Current Effective dated message (PERSON_BASIC_CV_FULLSYNC_EFF) the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract only current effective dated rows for Clairvia employees.

The standard PERSON_BASIC_FULLSYNC message publishes information for all employees, regardless of their enrollment in Clairvia, as well as all past, present and future dated rows of information that is not relevant to Clairvia. Using the mapping views publishes only the current effective-dated information needed by Clairvia to the PERSON_BASIC_CV_FULLSYNC_EFF message immediately. The Full Data Publish Utility ignores historical data and writes future-dated rows to the EO_EFFDELAY delay record. The Enterprise Components Effective Date Publish utility picks up any records from the delay table that are now current and generates PERSON_BASIC_CV_SYNC_EFF messages.

The full data publish utility publishes a data message with all of the PERSON_DATA information for all Clairvia integrated employees.

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WORKFORCE_CV_FULLSYNC Message Design

For the Workforce Clairvia FullSync message (WORKFORCE_CV_FULLSYNC) the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract all historical, current and future dated rows for Clairvia employees.

Using the mapping views publishes only the information needed by Clairvia to the WORKFORCE_CV_FULLSYNC message immediately. This message does not use '_EFF' in the message name, so it does not use current effective dating logic and passes all rows over to the new Clairvia message.

The full data publish utility publishes a data message with the workforce information for all Clairvia integrated employees.

JPM_JP_CV_FULLSYNC_EFF Message Design

For the HR Manage Profiles JP Clairvia FullSync Current Effective dated message (JPM_JP_CV_FULLSYN_EFF), the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract only current effective dated rows for Clairvia employees for the desired HR Manage Profiles content type, using the highest ranking qualifier instance content items.

The standard JPM_JP_FULLSYNC message publishes information for all employees, regardless of their enrollment in Clairvia, as well as all qualifier instances and all past, present and future dated rows of information that is not relevant to Clairvia. Using the mapping views publishes only the current effective-dated information needed by Clairvia to the JPM_JP_CV_FULLSYNC_EFF message immediately. The Full Data Publish Utility ignores historical data and writes future dated rows to the EO_EFFDELAY Delay record. The Enterprise Components Effective Date Publish utility picks up any records from the delay table that are now current and generates JPM_JP_CV_SYNC_EFF messages.

The full data publish utility publishes a data message with all of the Profile information for all Clairvia integrated employees.

PERSON_BASIC_CV_SYNC_EFF Message Design

For the Person Basic Clairvia Sync Current Effective-dated message (PERSON_BASIC_CV_SYNC_EFF), the system makes two passes to place the generic data into a format that Clairvia can use. A handler was added to PERSON_BASIC_SYNC for the first pass and a handler added to PERSON_BASIC_CV_SYNC for the second pass.

In the first pass, the data in the PERSON_BASIC_SYNC message is copied to an interim PERSON_BASIC_CV_SYNC message that contains all data except for the PERS_ORG_REL_WK work record, which is not required by Clairvia.

In the second pass, an Enterprise Components routine reads the PERSON_BASIC_CV_SYNC message and determines if the message contains the current effective-dated row. Current effective-dated rows are copied to the PERSON_BASIC_CV_SYNC_EFF message for publishing. Future-dated rows are copied to the EO_EFFDELAY Delay record. The EC Effective Dating utility compares the future dated row to the date on the utility and if the date is now current, generates the PERSON_BASIC_CV_SYNC_EFF message. Historical rows are ignored and not copied to PERSON_BASIC_CV_SYNC_EFF. The Effective Dating utility creates three messages: a header message where PSCAMA. MSG_SEQ_FLG = H, a data message containing the actual data needed by Clairvia and a trailer message where PSCAMA. MSG_SEQ_FLG = T.

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JPM_JP_CV_SYNC_EFF Message Design

For the HR Manage Profiles Profile Clairvia Sync Current Effective-dated message (JPM_JP_CV_SYNC_EFF), the system makes two passes to place the generic data into a format that Clairvia can use. A handler was added to JPM_JP_SYNC for the first pass and a handler added to JPM_JP_CV_SYNC for the second pass.

In the first pass, the data in the JPM_JP_SYNC message is copied to an interim JPM_JP_CV_SYNC message after the system removes any content types that are not one of the Clairvia installation table content types.

In the second pass, an Enterprise Components routine reads the JPM_JP_CV_SYNC message and determines if the message contains the current effective-dated row. Current effective-dated rows are copied to the JPM_JP_CV_SYNC_EFF message for publishing. Future-dated rows are copied to the EO_EFFDELAY Delay record. The Effective Dating utility compares the future dated row to the date on the utility and if the date is now current, generates the JPM_JP_CV_SYNC_EFF messages. Historical rows are ignored and not copied to JPM_JP_CV_SYNC_EFF. The Effective Dating utility creates three messages: a header message where PSCAMA. MSG_SEQ_FLG = H, a data message containing the actual data needed by Clairvia and a trailer message where PSCAMA. MSG_SEQ_FLG = T.

WORKFORCE_CV_SYNC Message Design

For the Workforce Sync Clairvia message (WORKFORCE_CV_SYNC), a handler for the message reads the generic WORKFORCE_SYNC message and copies all rows over to WORKFORCE_CV_SYNC that are for Clairvia Employees. All past, present and future data is copied to the WORKFORCE_CV_SYNC message.

Administering Time and Labor Integration with Clairvia

These topics provide an overview of the Time and Labor integration with Clairvia, and discuss how to:

- Publish reported punch time and reported leave time to Clairvia.
- Publish leave balances to Clairvia.
- Receive schedule and leave information from Clairvia.

Pages Used to Administer Time and Labor Integration with Clairvia

Page Name	Definition Name	Usage
Publish Time and Labor Data Page	TL_TIME_DATA	Send reported punch and approved time to Clairvia. Run the TL_PUB_TLDAT process.
Publish Leave Balances Page	TL_TIME_DATA	Send the Base Benefits leave balances for subscribed employees to Clairvia.

Understanding Time and Labor Integration with Clairvia

In order for Time and Labor to send and receive information from Clairvia, your system must meet the following criteria:

- PeopleSoft Human Resources and PeopleSoft Time and Labor are installed.

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- Clairvia is installed.
- Time reporting codes and leave plans are manually entered in Clairvia.

In addition, employees must meet the following criteria:

- The employee must be enrolled in Clairvia.
- The PeopleSoft employee must exist in Clairvia – using the messages from PeopleSoft HR.
- The employee must be enrolled in Time and Labor.

Publish Time and Labor Data Page

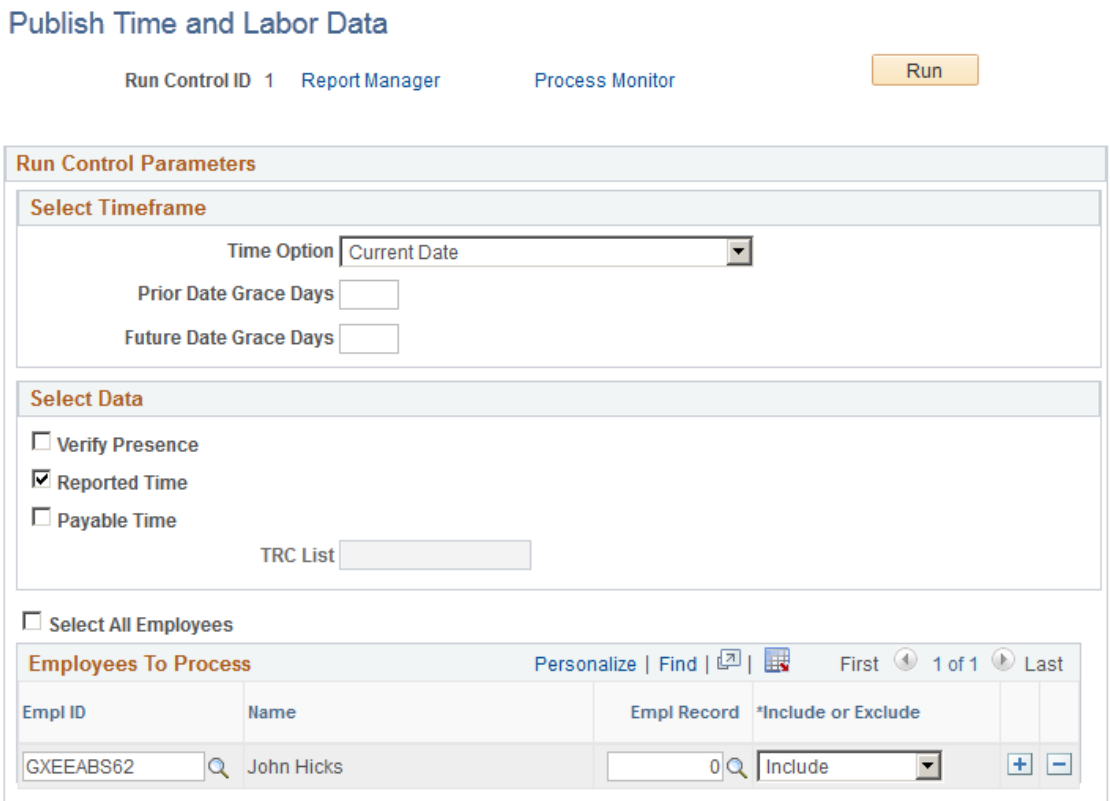
Use the Publish Time and Labor Data page (TL_TIME_DATA) to send reported punch and approved time to Clairvia.

Run the TL_PUB_TLDAT process.

Navigation:

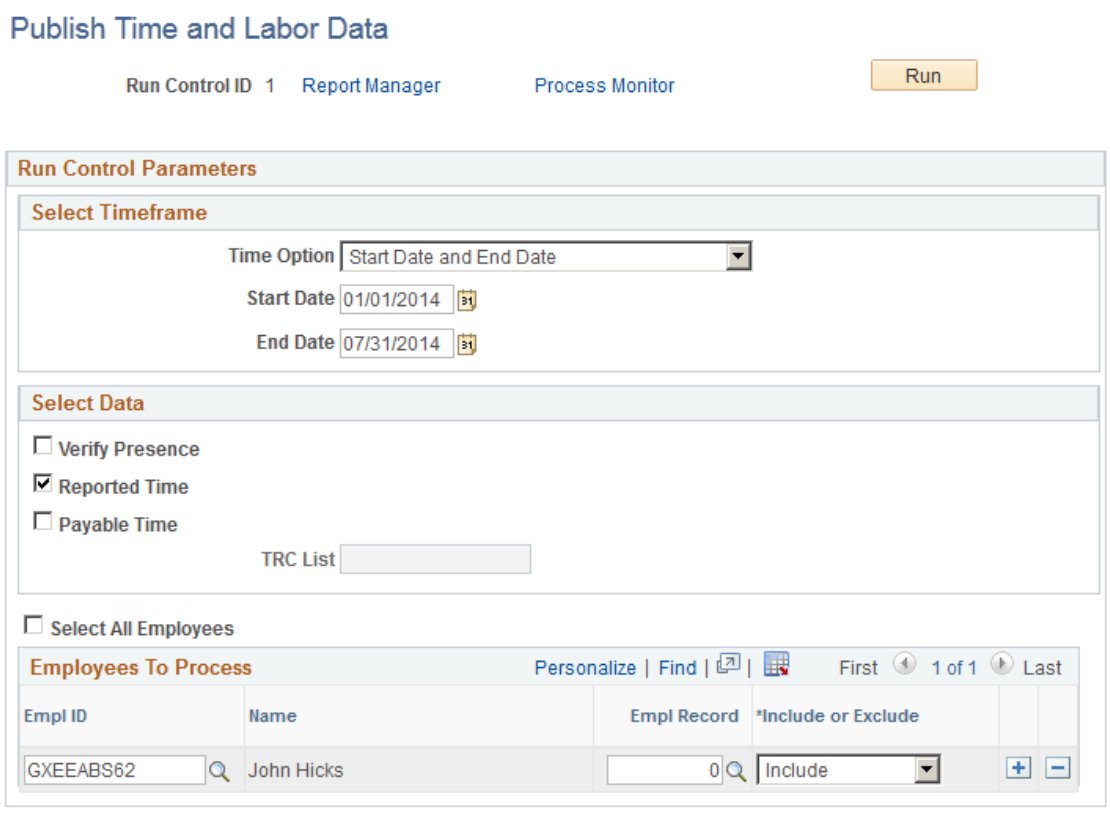
Time and Labor, and then **Process Time**, and then **Publish Time and Labor Data**

This example illustrates the fields and controls on the Publish Time and Labor Data page (showing Current Date time option). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Publish Time and Labor Data page (showing Start Date and End Date time option). You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Time Option	Select the time frame for the published data. The values are: *Current Date* and *Start Date and End Date*. Select *Current Date* to use the system date as the reporting period to collect the data for publishing. Select *Start Date and End Date* to specify a reporting period.
Start Date and **End Date**	Enter the range of dates to process. These fields are available if you select *Start Date and End Date* in the **Time Option** field.
Prior Date Grace Days	Enter the number of days before the current date you want to include in the data published to Clairvia. The system uses a reporting period start date equal to the system date minus the value in this field. This field is only available if you select *Current Date* in the **Time Option** field.
Future Date Grace Days	Enter the number of days in the future you want to include in the data published to Clairvia. The system uses a reporting period end date equal to the system date plus the value in this field. This field is only available if you select *Current Date* in the **Time Option** field.

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Field or Control	Description
Verify Presence	Select to publish the punch time for all employees, or any employees specified in the **Employees to Process** grid. For employees that have punch time when the process initiates, the system publishes the punch time so that Clairvia can track employees that are present at work. The system publishes any punch times that are available at publishing time, with a status of SV- Saved, NA - Needs Approval, AP – Approved, and SB – Submitted. Leave data is not included when you select this option.
Reported Time	Select to publish reported punch time, reported leave, and leave balances to Clairvia. Only reported time with a status of SB-Submitted, or AP-Approved, is published.
Payable Time	Select to publish employee payable time to Clairvia. The system publishes payable time with any status other than DN, CL, IG, OE, NP, PB, and RV. In addition, payable time with a negative quantity that is not offset, is published to Clairvia. If you specify a TRC List, the system only publishes payable time with those TRC's in the TRC List to Clairvia. **Note:** Payable Offsets are not published to Clairvia. The system identifies offset rows where the ORIG_SEQ_NBR is not zero.
TRC List	Select which TRCs the system uses when publishing payable time within the reported period to Clairvia. Leave this field empty to publish all payable time within the reported period. This field is only available when you select the **Payable Time** option.
Select All Employees	Select to publish the leave balance for all enrolled employees for the selected date range. Deselect this field to specify employees to include or exclude from processing.

Publishing Payable Time Scenarios

The following examples illustrate the payable time published to Clairvia by Time and Labor in different situations:

1. Scenario 1: For EMPLID KU0015, EMPL_RCD=0, the original and offset rows of payable time result in a zero quantity for the DUR.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	7.5	RP	N	543210001
10/10/2010 0:00	543210002	KUREG	-7.5	RP	N	543210001

Time and Labor publishes the following information to Clairvia:

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DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	0	RP	N	543210001

2. Scenario 2: For EMPLID KU0015, EMPL_RCD=0, the original, offset, and new rows of payable time result in a positive quantity for the DUR.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	6	TP	N	543210001
10/10/2010 0:00	543210002	KUREG	2	TP	N	543210002
10/10/2010 0:00	543210011	KUREG	-6	ES	N	543210001
10/10/2010 0:00	543210012	KUREG	–2	ES	N	543210002
10/10/2010 0:00	543210013	KUREG	3	ES	N	0
10/10/2010 0:00	543210014	KUREG	1	ES	N	0

> **Note**
>
> There are two KUREG for the same DUR in this scenario because there is a split in the task. For example, the system allocates 80% to Department A and 20% to Department B.

Time and Labor publishes the following information to Clairvia:

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210013	KUREG	3	ES	N	0
10/10/2010 0:00	543210014	KUREG	1	ES	N	0

3. Scenario 3: For EMPLID KU0015, EMPL_RCD=0, the user reports a negative quantity for regular time (KUREG).

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	–3.75	ES	N	0
10/10/2010 0:00	543210002	KUREG	–1.25	ES	N	0

Time and Labor publishes the following information to Clairvia:

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DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	–3.75	ES	N	0
10/10/2010 0:00	543210002	KUREG	–1.25	ES	N	0

4. Scenario 4: For EMPLID KU0015, EMPL_RCD=0, the original row has a status of *Ignored.* The payable time row never made it to payroll. This can be because the time reporting code is not mapped to an earning or the time rejected by payroll is intentionally closed out and is never paid.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	TL_PYBL_REASON_CD	ORIG_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	6	IG	MRJ	0
10/10/2010 0:00	543210002	KUREG	2	RP	PNP	543210002
10/10/2010 0:00	543210011	KUREG	-2	ES		543210002
10/10/2010 0:00	543210012	KUREG	6	ES		0
10/10/2010 0:00	543210013	KUREG	2	ES		0
10/10/2010 0:00	543210014	KUOVT	1.9125	ES		0
10/10/2010 0:00	543210015	KUOVT	.6375	ES		0

For this scenario, SEQ_NBR 543210001 is rejected by payroll, and then closed by the user. The user intentionally did not want this row paid. SEQ_NBR 5643210002 (TL_QUANTITY=2) is in rejected status, but this row could still be picked up for payroll. Then there is a change in reported time that causes the system to create offsets. The offset row is SEQ_NBR 543210011, and new time is generated for 543210012 through 543210015.

Time and Labor publishes the following information to Clairvia:

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	TL_PYBL_REASON_CD	ORIG_SEQ_NBR
10/10/2010 0:00	543210012	KUREG	6	ES		0
10/10/2010 0:00	543210013	KUREG	2	ES		0
10/10/2010 0:00	543210014	KUOVT	1.9125	ES		0
10/10/2010 0:00	543210015	KUOVT	.6375	ES		0

5. Scenario 5: For EMPLID KU0015, EMPL_RCD=0, Adjust Paid Time added a row (SEQ_NBR starts with ‘99999’ and RECORD_ONLY_ADJ = Y).

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DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	999990001	KUMLO	1.5	CL	Y	0
10/10/2010 0:00	999990002	KDSAD	–1.75	CL	Y	0

For this scenario, Time and Labor does not publish any information to Clairvia.

6. Scenario 6: For EMPLID KU0015, EMPL_RCD=0, the employee has been paid and a check reversal has been created.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	INITIAL_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	8	DL	0		543210001
10/10/2010 0:00	543210002	KUOVT	2	DL	0		543210002
10/10/2010 0:00	543210011	KUREG	-8	RV	543210001	CRV	543210001
10/10/2010 0:00	543210012	KUOVT	–2	RV	543210002	CRV	543210002

For this scenario, Time and Labor publishes the following information to Clairvia:

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	ORIG_SEQ_NBR
10/10/2010 0:00	543210011	KUREG	0	RV	543210001	CRV	543210001
10/10/2010 0:00	543210012	KUOVT	0	RV	543210002	CRV	543210002

7. Scenario 7: For EMPLID KU0015, EMPL_RCD=0, the employee has been paid and a check reversal has been created. However, the user wants the new estimated rows to be generated for future payment.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	INITIAL_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	8.5	RV	543210001	CRV	543210001
10/10/2010 0:00	543210010	KUREG	-8.5	RV	543210001	CRV	543210001
10/10/2010 0:00	543210011	KUREG	8.5	ES	0		543210001

For this scenario, Time and Labor publishes the following information to Clairvia:

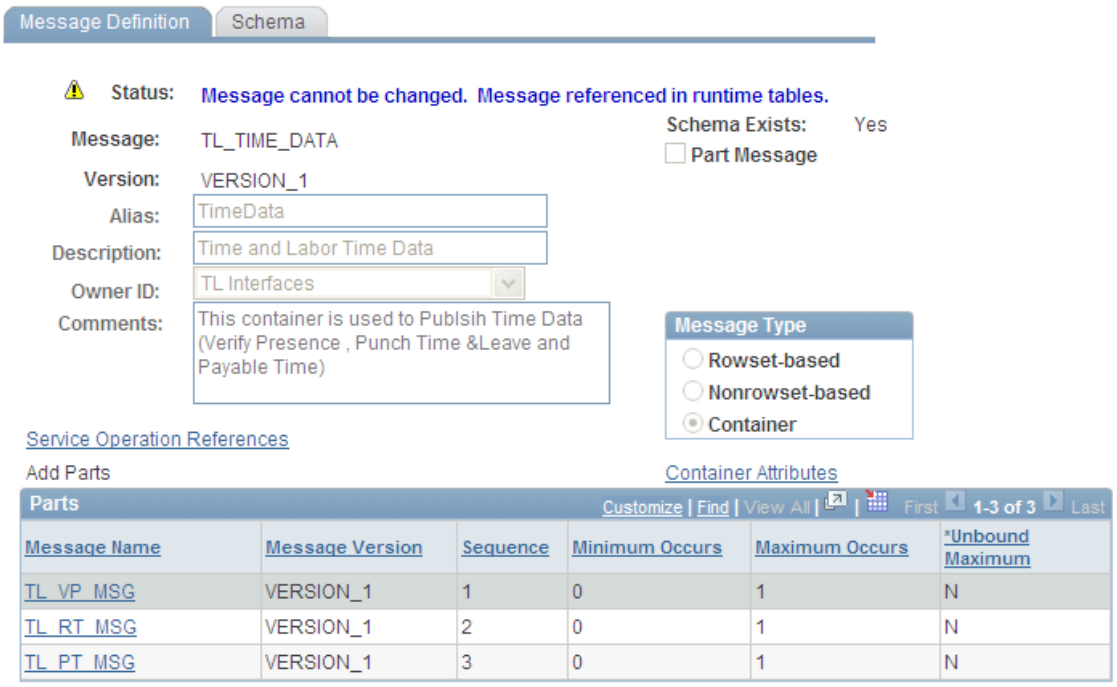
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DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	INITIAL_SEQ_NBR
10/10/2010 0:00	543210011	KUREG	8.5	ES	0		543210001

Message Definition

When you run the TL_PUB_TLDAT process from the Publish Time and Labor Data page, the system publishes the TL_TIME_DATA Integration Broker message to Clairvia.

This example illustrates the fields and controls on the Message Definition page, showing the parts of the TL_TIME_DATA message. You can find definitions for the fields and controls later on this page.



The TL_TIME_DATA message is a container with 3 parts:

- TL_VP_MSG contains punch time data only. This is the information specified by the Verify Presence option on the Publish Time and Labor Data page.
- TL_RT_MSG contains reported time data including all punch time, reported leave, and leave balances. This is the information specified by the Reported Time option on the Publish Time and Labor Data page.
- TL_PT_MSG contains the payable time data. This is the information specified by the Payable Time option on the Publish Time and Labor Data page.

Publish Leave Balances Page

Use the Publish Leave Balances page (TL_TIME_DATA) to send the Base Benefits leave balances for subscribed employees to Clairvia.

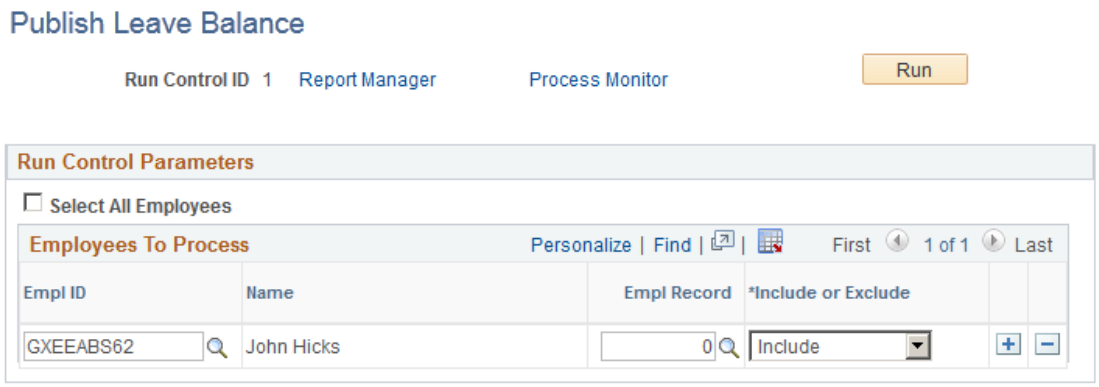
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Navigation:

Time and Labor, and then **Process Time**, and then **Publish Leave Balances**

After integrating Time and Labor and Clairvia for the first time, send all of the leave balances for the subscribed employees to Clairvia using the Publish Leave Balances process (TL_PUB_LVBL.)

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



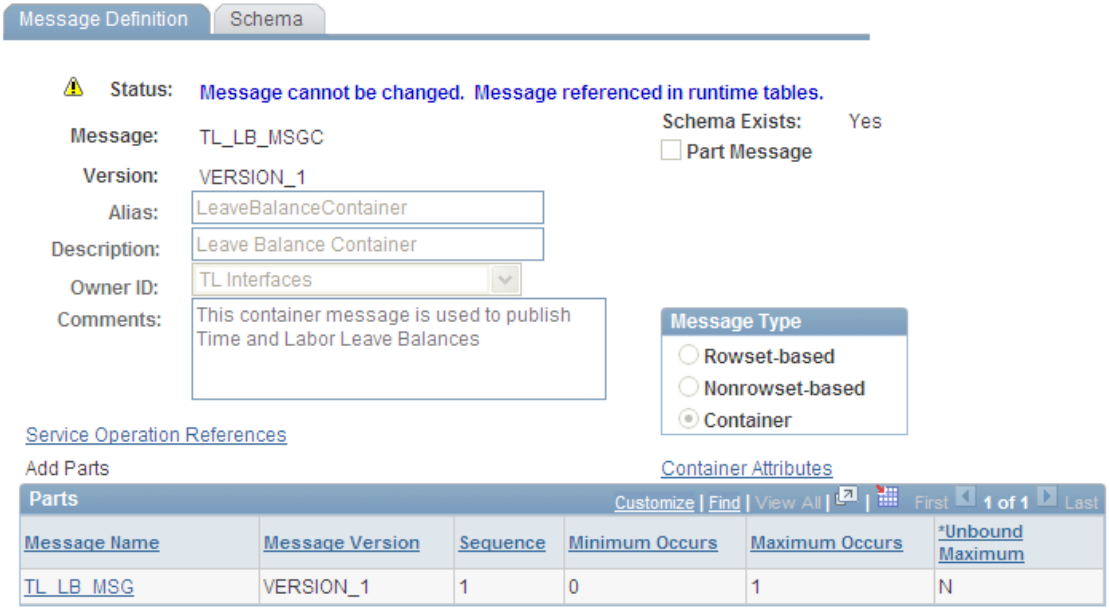
Field or Control	Description
Select All Employees	Select to publish the leave balance, as of the current date, for all enrolled employees. Deselecting this field enables you to specify employees to include or exclude from processing.

Message Definition

When you run the TL_PUB_LVBL process from the Publish Leave Balance page, the system publishes the TL_LB_MSGC Integration Broker message to Clairvia.

This example illustrates the fields and controls on the Message Definition page, showing the parts of the TL_LB_MSGC message. You can find definitions for the fields and controls later on this page.

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The TL_LB_MSGC message is a container with one part. The message, TL_LB_MSG, contains data from the TL_OWSSR_RUNCTL, TL_RUN_CTRL_GRP, TL_COMPLEAV_TBL, and JOB tables.

Review and Submit Page

Use this Review and Submit page (HR_MSS_CT_SBM_AGFL or HR_MSS_CT_SUBMT_FL) to review transaction information, to add comments, and to submit a request.

Navigation:

Select the **Next** button from the previous page, or select this step in the graphical representation of the transaction steps.

This example illustrates the fields and controls on the Review and Submit page for an employee transaction.



This example partially illustrates the Review and Submit page for the *Clone Position* transaction. The **Comments** and **Attachments** sections are not shown, but they are the same for the Clone Position transaction as for employee transactions.



> **Note**
>
> Guided Self Service will not update Job Data with blank field values.

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Field or Control	Description
Submit	Select this button to finalize the transaction and, if approvals are required, to begin the approval process. If no errors are encountered, the system displays a confirmation page that shows the approval chain. If errors are encountered, the HR administrator is notified. If approvals are not required, the confirmation page appears after the system makes the related database updates. For the *Update Job Details for Group* transaction, processing time increases with the number of employee records that are being updated.

> **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 Enterprise Components: Understanding Notification Composer.

Transaction Details for Employee Transactions

Transactions other than the *Clone Position* include a **Review and Submit** area that displays transaction information. The transaction date appears at the top of the page.

Field or Control	Description
Reason	Employee data changes are associated with an action and an action reason. This field displays the action reason for that transaction. The action is never visible, but the transaction configuration determines whether the **Reason** field is visible.
New Information	This column displays the data that will take effect when the transaction is approved. A yellow dot between the field name and the field value indicates data that is changing. To change a value, return to the appropriate page in the transaction to make the changes.
Current Information	This column displays the employee's current data so that you can easily see the changes that are being requested.
Selected Employees	For the *Update Job Details for Group* transaction, this section lists the employees whose data is being updated.

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Transaction Details for Clone Position

The same sections and fields that appeared on the Clone Transaction page appear on the Review and Submit page for the transaction. The transaction date appears at the top of the page.

Comments

Field or Control	Description
Comments	Enter additional comments for the transaction's approvers and reviewers. Comments entered here are visible throughout the approval process.

Attachments

Use the Attachments section of this page to attach supporting documents for a transaction. This section is visible only if the transaction is configured to allow attachments.

The attachments that you add here will appear in all transaction detail pages, including pages for approvers, administrators, and reviewers. The file itself is never duplicated, there are just multiple pointers to the file.

The list of transactions on the fluid Pending Approvals page includes a count of attachments for transactions that have attachments.

Approval-related notifications do not include information about attachments.

After you add an attachment to the transaction, a grid appears in the Attachments area of the page.

This example illustrates the Attachments grid on the Review and Submit page.



Field or Control	Description
 **Add Attachment**	Click to open a dialog box where you can select and upload a file. Your device and browser determine the appearance and behavior of this dialog box. Allowable file types depend on your configuration and can be further restricted by the type of device you use. For example, iOS phones allow you to attach photos or videos, but they do not provide access to a full file system where you can select other types of attachments. This button has a text label when no attachments have been added yet. If attachments exist, an icon button appears instead.

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Field or Control	Description
File Name	Displays the original file name of the attachment. Click the link to open the attachment.
Description	The default description is the file name, but you can modify this to provide more descriptive text.
DateTime Attached	Displays the date and time that the file was uploaded.
 **Delete**	Click to remove the attachment.

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Integrating with Fusion Talent Management and Fusion Workforce Compensation

Understanding the Coexistence

The PeopleSoft HCM to Fusion Talent Management and Fusion Workforce Compensation coexistence enables customers to implement and maintain Fusion applications that leverage data from an established on-premise PeopleSoft HR system. This document focuses on how to set up and manage the PeopleSoft HCM side of the coexistence.

There are three main data transfer processes that comprise the coexistence:

- Sending core HR data from PeopleSoft HCM to Fusion.
- Migrating profile data from PeopleSoft HCM to Fusion.
- Receiving compensation data from Fusion.

Sending Core HR Data to Fusion

This process enables you to transform and send the following types of core HR data to Fusion:

- Location
- HR Business Unit
- Department
- Job Grade
- Job Code
- Person/Job
- Department Tree
- Position
- Job Grade Rate
- Salary
- Bonus

PeopleSoft HCM serves as the system of record for this data and the synchronization of this data with the Fusion Talent Management system occurs on a regular (e.g., daily) basis. You manage the frequency of the data synchronization between PeopleSoft HCM and Fusion Talent Management using the PeopleTools Process Scheduler.

See Send HR Data to Fusion Page.

Migrating Profile Data

This is a one-time process that migrates the performance appraisal data from PeopleSoft HCM 9.2 to Fusion. Once that process is run, the data is maintained in the Fusion system going forward.

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See Migrate Profile Data Page

Receiving Compensation Data

Fusion Workforce Compensation serves as the system of record for this process, which reviews and updates workforce compensation data. Through this process, Fusion Workforce Compensation passes data back to the PeopleSoft HCM 9.2 system to update employee records for future payroll processing.

It is also possible to pass bonus information from Fusion to PeopleSoft Payroll using existing integration functionality included with the PeopleSoft Variable Compensation application.

See Receiving Data from Fusion

Setting Up Domain Value Maps

Pages Used to Set Up Data Mapping

Page Name	Definition Name	Usage
Define Value Maps - Elements Page	EOTF_DEFINE_MAPS	Review assigned map elements.
Define Value Maps – Domains Page	EOTF_DEFINE_MAPS2	Review assigned domain elements.
Import Value Maps Page	EOTF_MAP_IMPORT	Import manually-defined XREFs.
Domain Value Map Page	EOTF_POPULATE_DVMS	Verify and update domain value maps.

Understanding Domain Value Map Setup

Domain value maps (DVMs) are what PeopleSoft HCM uses to associate PeopleSoft objects with Fusion objects when transforming data. PeopleSoft delivers the definitions for all of these DVMs, but the customer must verify their delivered populated values. In addition, some of the delivered DVMs require that you manually set up and populate values for them.

> **Note**
>
> You load and manage DVM definitions and values using the PeopleSoft Application Integration Framework, which is part of Enterprise Components and is a prerequisite for the coexistence.
>
> See Application Integration Framework: Understanding Value Maps

Delivered DVMs

The following table lists the DVMs that are delivered as part of the PeopleSoft HCM to Fusion Talent Management and Fusion Workforce Compensation coexistence. The table lists the name of each DVM along with the system object to which it pertains. In addition, the System Data column lists a code which indicates the type of values PeopleSoft delivers for it as system data. The system data codes are:

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- *PF:* The DVM has both PeopleSoft and Fusion values delivered as system data. Customers should verify the delivered values.
- *P:* The DVM has PeopleSoft values delivered as system data. Customers should verify the delivered values and add corresponding Fusion values.
- *M:* The DVM has no values delivered as system data and is also known as a “manual XREF”. Populating the values for this DVM requires setting up the date in Fusion, exporting the data to a .dat file, manually modifying the .dat file, saving it as a .csv file, and importing the values into PeopleSoft.
- *N:* The DVM has no values delivered as system data. Customers must populate the values for this DVM using the Populate Domain Value Maps page of the PeopleSoft Application Integration Framework.
- *X:* The DVM has no values delivered as system data. Populating the values for this DVM requires setting up the date in Fusion, exporting the data to a .dat file, manually modifying the .dat file, saving it as a .csv file, and importing the values into PeopleSoft. In addition, these DVMs need to be seeded with specific values.

See Application Integration Framework: Importing Value Maps

DVM Name	Related System Object	System Data
ACTION_REASON_XREF	Worker	M
ACTION_XREF	Worker	M
ADDRESS_USE_CODE	Worker	P
BONUS_ELEMENT_TYPE_XREF	PayrollElemenEntry	M
BONUS_INPUT_VALUE_XREF	PayrollElemenEntry	M
CountryCodeDVM	Most All	P
CURRENCY95CODE	Many	P
FREQUENCY_CODE	WorkerPosition	P
FREQUENCY_TYPE_CODE	Salary	P
GRADE_ACTIVE_STATUS_CODE	Grade	PF
JOB_ACTIVE_STATUS_CODE	Job Code	PF
JOB_FUNCTION_CODE	Job Code	P
JOB_MANAGER_LEVEL_CODE	Job Code	P
JOB_MEDICAL_CHECKUP_REQUIRED_CODE	Job Code	PF
JOB_REGULAR_FLAG_CODE	Job Code	P
LanguageCodeDVM	Most All	P
LEGAL_ENTITY_XREF	Many	M
LEGISLATIVE_DATA_GROUP_XREF	GradeRate	M
LOCATION_GEO_HIERARCHY_NODE_CODE	Location	P
MARITAL_STATUS	Worker (Person)	P*
PERSON_EMAIL_ADDRESS_TYPE_CODE	Worker (Person)	P
PERSON_ETHNICITY_CODE	Worker (Person)	N
PERSON_GENDER_CODE	Worker (Person)	P*
PERSON_HIGHEST_EDU_LEVEL_CODE	Worker (Person)	P
PERSON_NAME_PREFIX_CODE	Worker (Person)	P
PERSON_NAME_TYPE_CODE	Worker	P

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DVM Name	Related System Object	System Data
PERSON_NID_TYPE_CODE	Worker (Person)	P
PERSON_RELIGION_CODE	Worker (Person)	N
PHONE_TYPE_CODE	Worker (Person)	P
POSITION_FULL_PART_TIME_CODE	Position	P
POSITION_HIRING_STATUS_CODE	Position	P
POSITION_SECURITY_CLEARANCE_CODE	Position	P
POSITION_TYPE_CODE	Position	P
SALARY_COMP_ACTION_REASON_CODE	Salary	P
SALARY_ELEMENT_TYPE_XREF	Salary	M
SALARY_INPUT_VALUE_XREF	Salary	M
SETID_XREF	Many	M
StateCodeDVM	Location	P
TALENTPROFILETYPE_XREF	TalentProfileType	X
TP_CI_LANGUAGE_XREF	TPContentType	M
TP_CI_RELATIONSHIP_CODE	TPContentType/ TPContentItemRelationship	P
TP_CT_XREF	TPContentType	X
TP_IMPORTANCE_CODE	TalentProfileItem	P
TP_INTEREST_LEVEL_CODE	TalentProfileItem	P
TP_OBJECT_ASSOCIATION_XREF	TalentProfile	X
TP_USAGE_CODE	TalentProfileType/TalentProfile	P
TPINSTANCEQUALIFIERSET_IN_XREF	TalentProfileInstanceQualifier	X
TREE_VERSION_ACTIVE_STATUS_CODE	Many	PF
WORKER_ASSIGNMENT_CLASSIFICATION_CODE	Worker/ Assignments	P
WORKER_ASSIGNMENT_EMPLOYEE_CATEGORY_CODE	Worker	P
WORKER_ASSIGNMENT_STATUS_TYPE_XREF	Worker	M
WORKER_ASSIGNMENT_TYPE_CODE	Worker	P
WORKER_BARG_UNIT_CODE	Worker	N
WORKER_EMPL_TYPE_CODE	Worker/ Assignments	P
WORKER_PAYROLL_STATUS_CODE	Worker	P
WORKER_PERSON_TYPE_XREF	Worker	M
WORKER_PRIMARY_INDICATOR_CODE	Worker/ Assignments	P
WORKER_SYSTEM_PERSON_TYPE_CODE	Worker	P
WORKER_TYPE_CODE	Worker	P
WORKER_WORK_TERM_ASSIGNMENT_TYPE_CODE	Worker	P

* Indicates a DVM for which customers must map the PeopleSoft value of *Unknown* to *Null* in Fusion.

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> **Note**
>
> This table lists only the delivered static value maps (DVMs). The PeopleSoft HCM 9.2 to Fusion Talent Management and Fusion Workforce Compensation coexistence also includes delivered dynamic value maps (cross-references) as system data, but they require no customer modification. You can use the Define Value Maps component to review the definitions of both types of delivered value maps.

Manual Setup of XREF DVMs

Delivered type M (manual XREF) and type X DVMs (for example, WORKER_PERSON_TYPE_XREF and TP_OBJECT_ASSOCIATION_XREF) require manual set up.

> **Note**
>
> The DVMs with the XREF suffix are static value maps. Do not confuse the _XREF suffix with the term *cross-reference,* which is often used synonymously with dynamic value maps when discussing the Application Integration Framework.

To manually set up and import an XREF DVM:

1. Define the object in Fusion and export the primary Fusion keys and other descriptive attributes to a .dat file. This file should contain the auto-generated GUID, Fusion key and/or user-intelligent Fusion description fields corresponding to the PeopleSoft values populated for the DVM.
2. Open the .dat file in Microsoft Excel.
3. Enter the PeopleSoft keys to map the functional Fusion description and Fusion GUID, and save the file in .csv format. Make sure you configure the .csv file following these guidelines:
   a. The first row in the file must contain *DVM* in the first column and the name of the map to be imported in the second column.
   b. Each column in the second row of the file must identify the names of the elements into which the values will be imported. Reference data is optional. To define a reference data column that will be ignored by the import process, add an asterisk (*) in front of the name, or leave the name blank.
   c. Subsequent rows in the file identify the data values to be imported, and must contain the same number of columns as the second row.

   This example illustrates what a correctly configured .csv file should look like.

	A	B	C	D	E
1	DVM	LEGAL_ENTITY_XREF			
2	FT_LEGALENTY_GUID	*FusionKey	COMPANY	Description	Description2
3	8B572FEBB44DC355E040578C495D0EA3	940011	PSI	PSFT-PSI	US
4	8B572FEBB44EC355E040578C495D0EA3	40016	CWB	PSFT-CWB	US
5	8B572FEBB44FC355E040578C495D0EA3	40015	HX1	PSFT-HX1	US
6	8B572FEBB44EC355E040578C495D0EA3	940015	PSF	PSFT-PSF	US

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4. Import the modified .csv file using the Import Value Maps page.

   See Import Value Maps Page.

5. Review the imported data using the Populate Domain Value Maps page to verify that it is correct.

   See Domain Value Map Page.

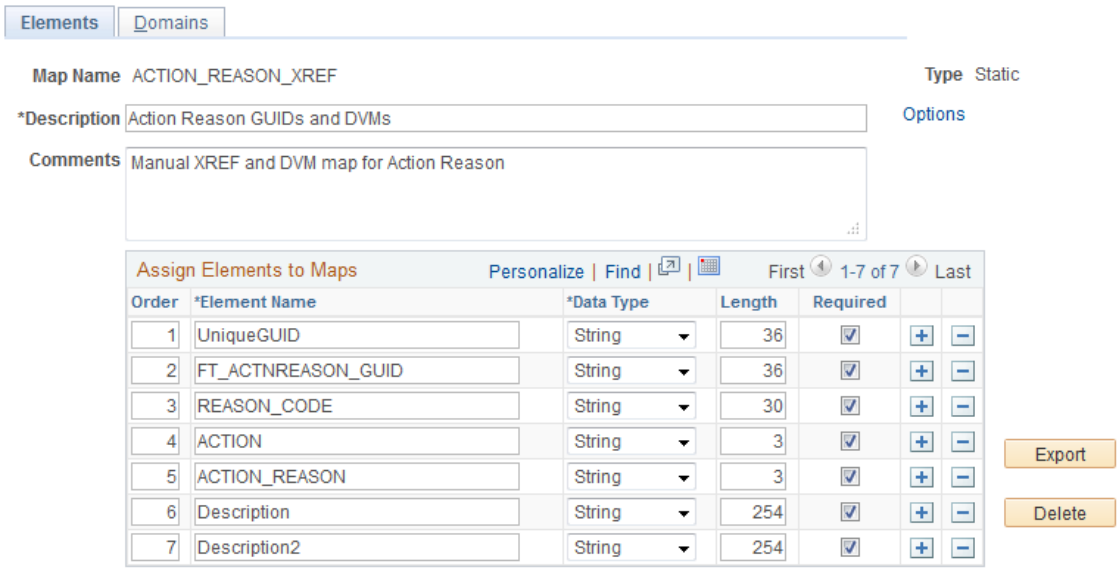
Define Value Maps - Elements Page

Use the Define Value Maps - Elements page (EOTF_DEFINE_MAPS) to review assigned map elements.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Transformation Framework**, and then **Define Value Maps**

This example illustrates the fields and controls on the Define Value Maps - Elements page.



PeopleSoft delivers all of the DVM definitions that are relevant to the coexistence with Fusion Talent Management and Fusion Workforce Compensation. Therefore you will typically use this page only as a reference for determining the elements that are assigned to a particular DVM.

Related Topics

- Application Integration Framework: Defining Value Maps

Define Value Maps – Domains Page

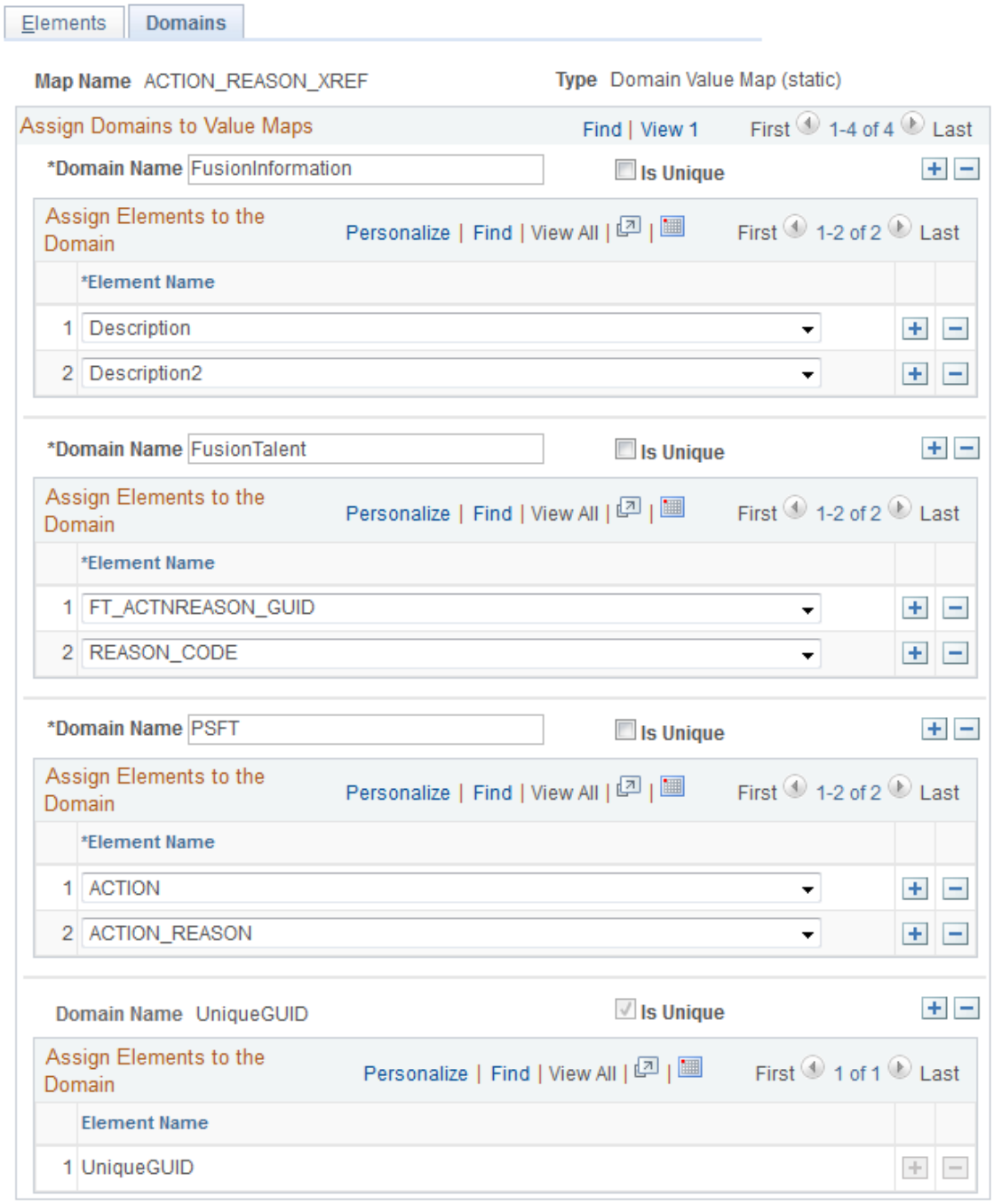
Use the Define Value Maps - Domains page (EOTF_DEFINE_MAPS2) to review assigned domain elements.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Transformation Framework**, and then **Define Value Maps**, and then **Domains**

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This example illustrates the fields and controls on the Define Value Maps - Domains page.



PeopleSoft delivers all of the DVM definitions that are relevant to the coexistence with Fusion Talent Management and Fusion Workforce Compensation. Therefore you will typically use this page only as a reference for determining the elements that are assigned to domains of a particular DVM.

Related Topics

- Application Integration Framework: Defining Value Maps

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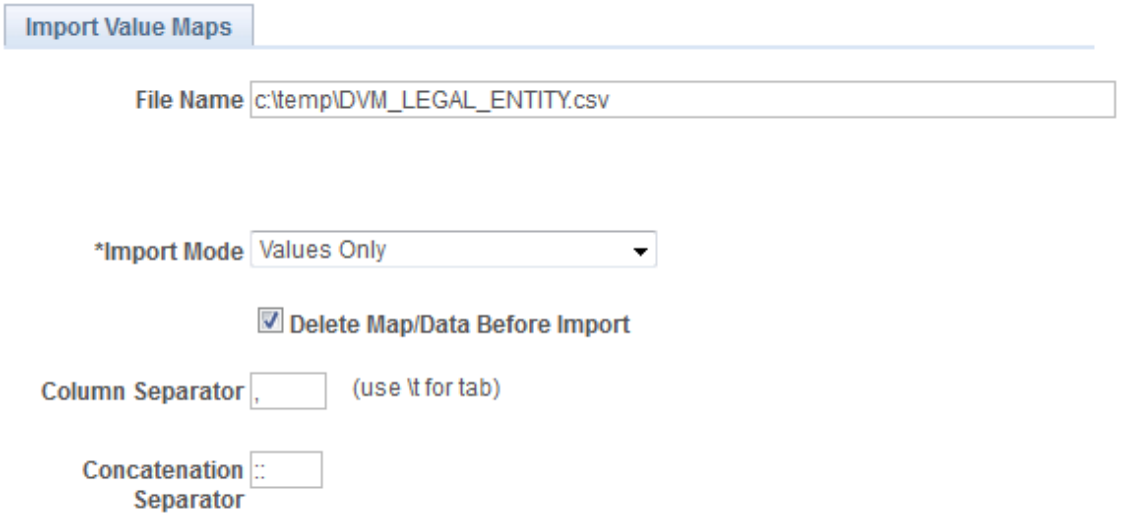
Import Value Maps Page

Use the Import Value Maps page (EOTF_MAP_IMPORT) to import manually-defined XREFs.

Navigation:

Enterprise Components, and then **Integration Definitions**, and then **Transformation Framework**, and then **Import Value Maps**

This example illustrates the fields and controls on the Import Value Maps page.



Field or Control	Description
File Name	Enter the name of the file to be imported, including the path.
Import Mode	Select the *Values Only* value. **Note:** It is important that you select the *Values Only* value. If you were to select either of the other values, the import process would override the map definition. This would likely result in having to manually redefine the map.
Delete Map/Data Before Import	Select this check box.
Column Separator	Leave this field blank.
Concatenation Separator	Leave this field blank.
Import	Click to initiate the Import process.

Related Topics

- Application Integration Framework: Importing Value Maps

Domain Value Map Page

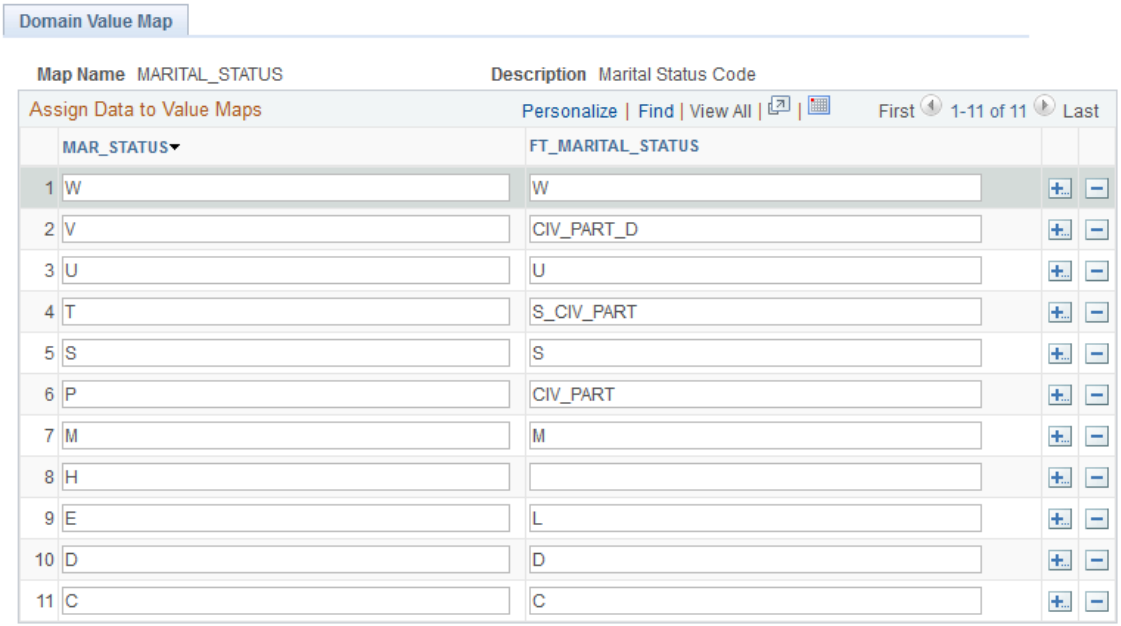
Use the Domain Value Map page (EOTF_POPULATE_DVMS) to verify and update domain value maps.

Navigation:

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Enterprise Components, and then **Integration Definitions**, and then **Transformation Framework**, and then **Populate Domain Value Maps**

This example illustrates the fields and controls on the Domain Value Map page.



A column appears on this page for each element assigned to the DVM, excluding Unique GUID, which is an element common to all DVMs. Use this page to verify delivered element values, and to add and update values to suit your business process needs.

> **Note**
>
> Make sure that all of the fields in all of the columns have values or you might encounter unexpected results when running the data transformation process (FT_EXTRACT). The exceptions to this are any Description or Description2 columns. Blank fields in these columns are not problematic.

Related Topics

- Application Integration Framework: Populating a Domain Value Map

Setting Up Web Services for the Coexistence

The files transported between the PeopleSoft environment and the Fusion environment are single compressed .zip files. The transfer of these files to and from the PeopleSoft environment is supported by PeopleSoft Integration Broker web service messages. PeopleSoft delivers the web service message structure as part of the PeopleSoft HCM 9.2 to Fusion Talent Management and Fusion Workforce Compensation coexistence, but there are several steps you must take to complete the Integration Broker configuration.

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Pages Used to Set Up Web Services for the Coexistence

Page Name	Definition Name	Usage
Service Operations - General Page	IB_SERVICE	Activate delivered service operations.
Web Service Access Page	WS_ACCESS_IB	Set access to permission lists.
Service Operations - Handlers Page	IB_SERVICEHDLR	Activate delivered handlers.
Service Operations - Routings Page	IB_SERVICERTNGS	Add routing definitions.
Routing Definition	IB_ROUTINGDEFN	Activate delivered routings.
Connector Properties Page	IB_ROUTINGDEFNCON	Configure routing connector properties.
Queue Definitions Page	IB_QUEUEDEFN	Activate delivered queue.
Node Definitions Page	IB_NODE	Update node credentials.
Connectors Page	IB_NODECONN	Configure node connector properties.
WS Security Page	IB_NODESECURITY	Update node security.

For more information on setting up web services, see the product documentation for *PeopleTools: Integration Broker*.

Service Operations - General Page

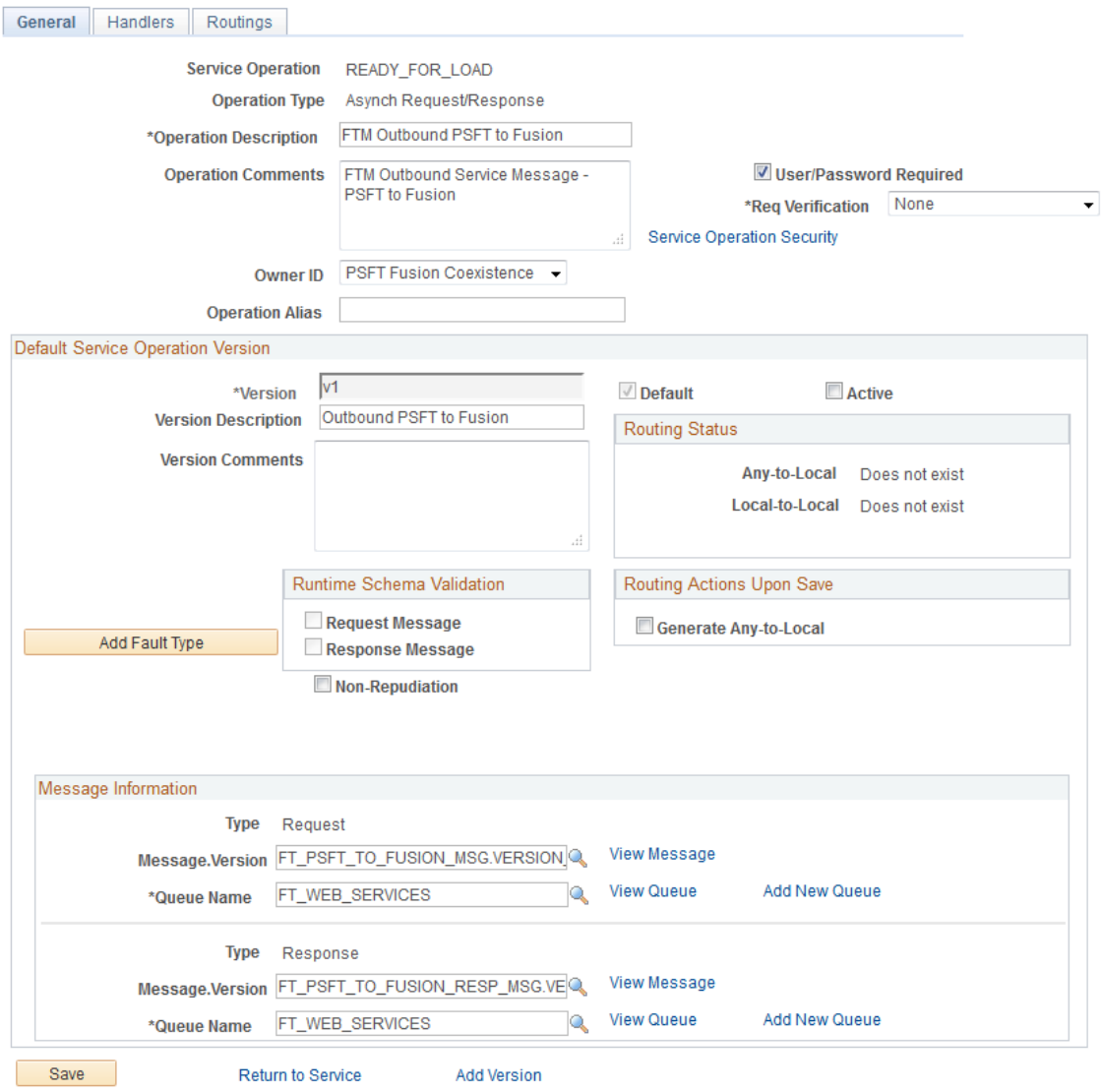
Use the Service Operations - General page (IB_SERVICE) to activate delivered service operations.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations**, and then **General**

This example illustrates the fields and controls on the Service Operations - General page.

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READY_FOR_LOAD and READY_FOR_TRANSMISSION

Select the **User/Password Required** and **Active** check boxes for the READY_FOR_LOAD and READY_FOR_TRANSMISSION service operations.

WORKFORCE_SYNC

Select the **Active** check box for the WORKFORCE_SYNC service operation. In addition, make sure that the value in the **Message.Version** field is *WORKFORCE_SYNC.INTERNAL*.

Web Service Access Page

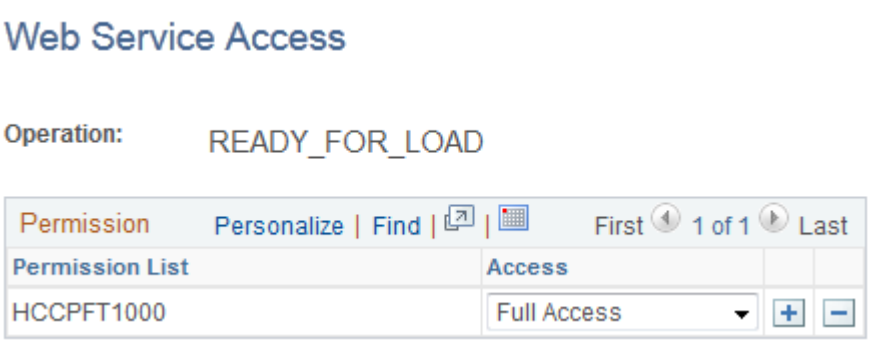
Use the Web Service Access page (WS_ACCESS_IB) to Set access to permission lists.

Navigation:

Click the Service Operations Security link on the Service Operations - General page.

This example illustrates the fields and controls on the Web Service Access Page.

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Set the **Access** field to *Full Access* for the HCCPFT1000 permission list. Do this for the READY_TO_LOAD, READY_FOR_TRANSMISSION, and WORKFORCE_SYNC service operations.

Service Operations - Handlers Page

Use the Service Operations - Handlers page (IB_SERVICEHDLR) to activate delivered handlers.

Navigation:

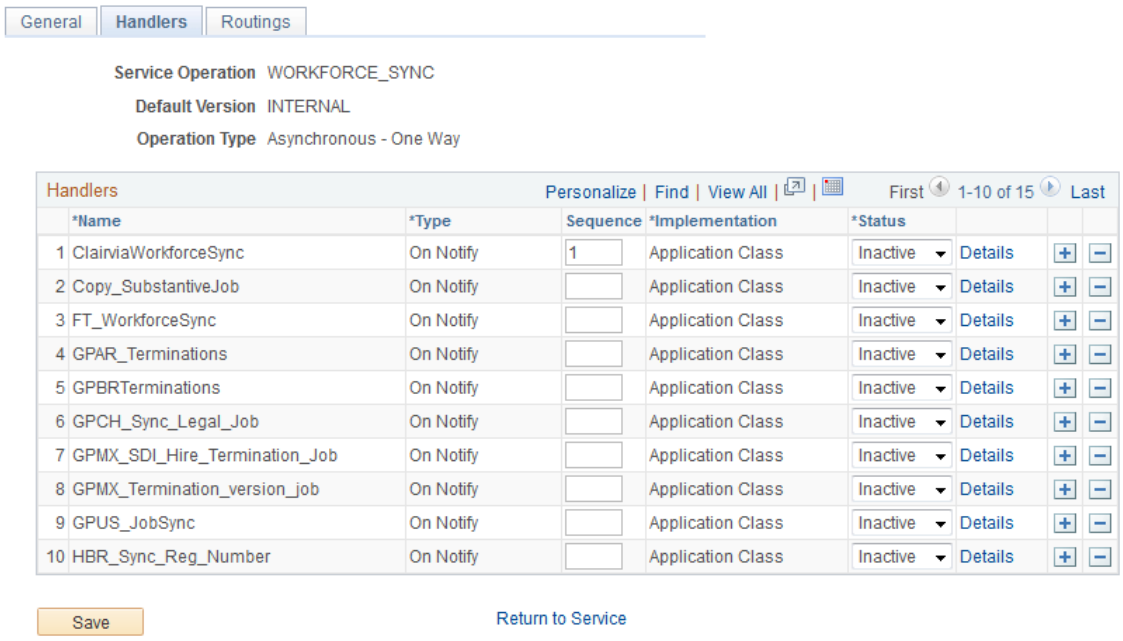
PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations**, and then **Handlers**

This example illustrates the fields and controls on the Service Operations - Handlers page for the READY_FOR_LOAD service operation.



This example illustrates the fields and controls on the Service Operations - Handlers page for the WORKFORCE_SYNC service operation.

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READY_FOR_LOAD and READY_FOR_TRANSMISSION

To activate the delivered handlers for the READY_FOR_LOAD and READY_FOR_TRANSMISSION service operations, select the *Active* value in the **Status** column for each handler.

WORKFORCE_SYNC

For the WORKFORCE_SYNC service operation, select *Active* in the **Status** column for the FT_WorkforceSync handler.

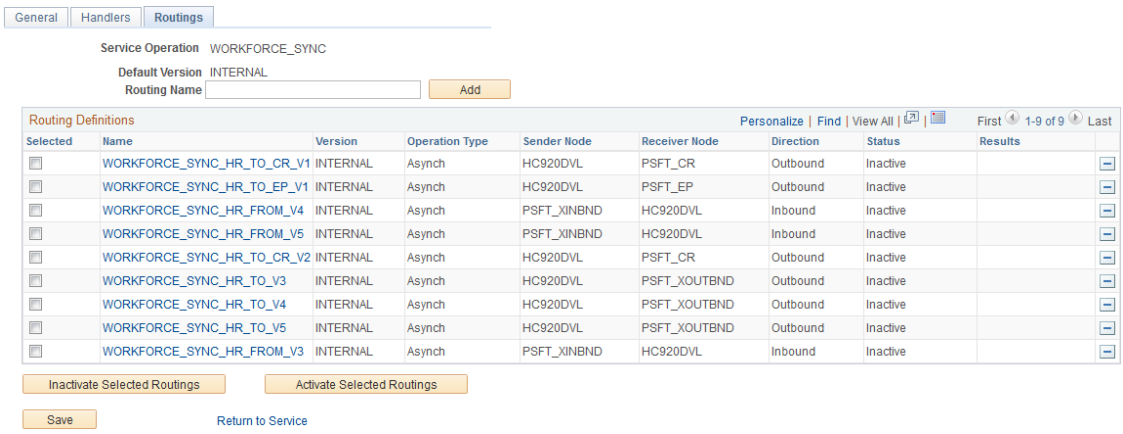
Service Operations - Routings Page

Use the Service Operations - Routings page (IB_SERVICERTNGS) to add routing definitions.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations**, and then **Routings**

This example illustrates the fields and controls on the Service Operations - Routings Page.



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For the WORKFORCE_SYNC service operation, enter *WORKFORCE_SYNC_LOCAL* in the **Routing Name** field and click the **ADD** button. This takes you to the Routing Definitions page.

Routing Definition

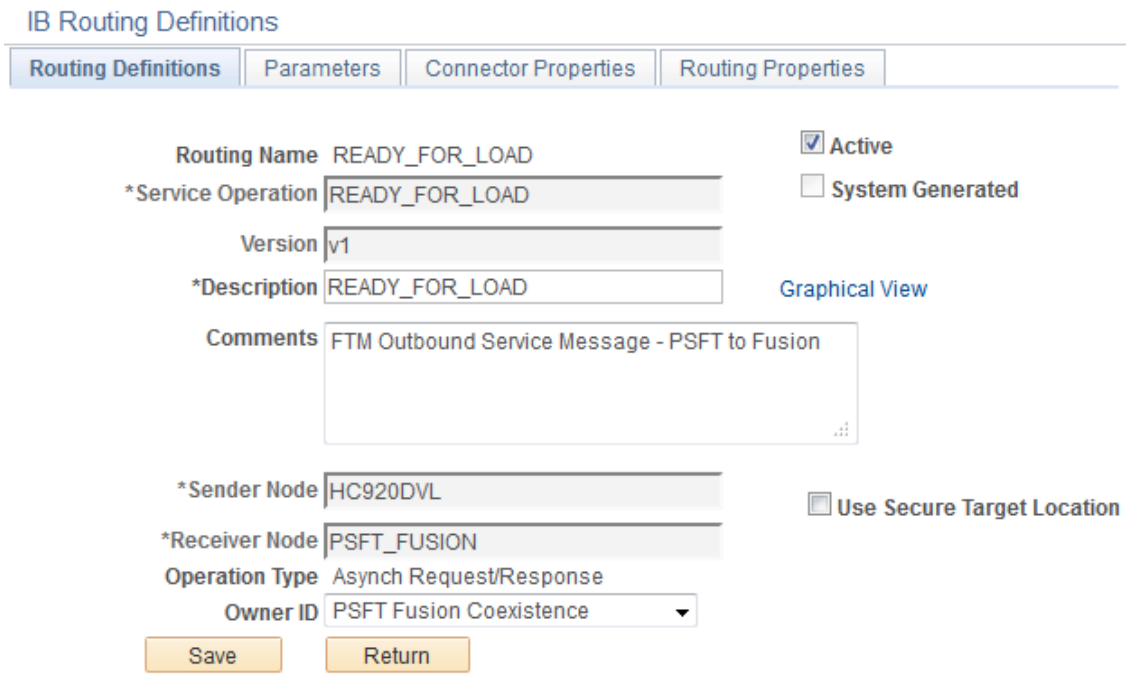
Use the Routing Definition page (IB_ROUTINGDEFN) to activate delivered routings.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Service Operations**, and then **Routings**

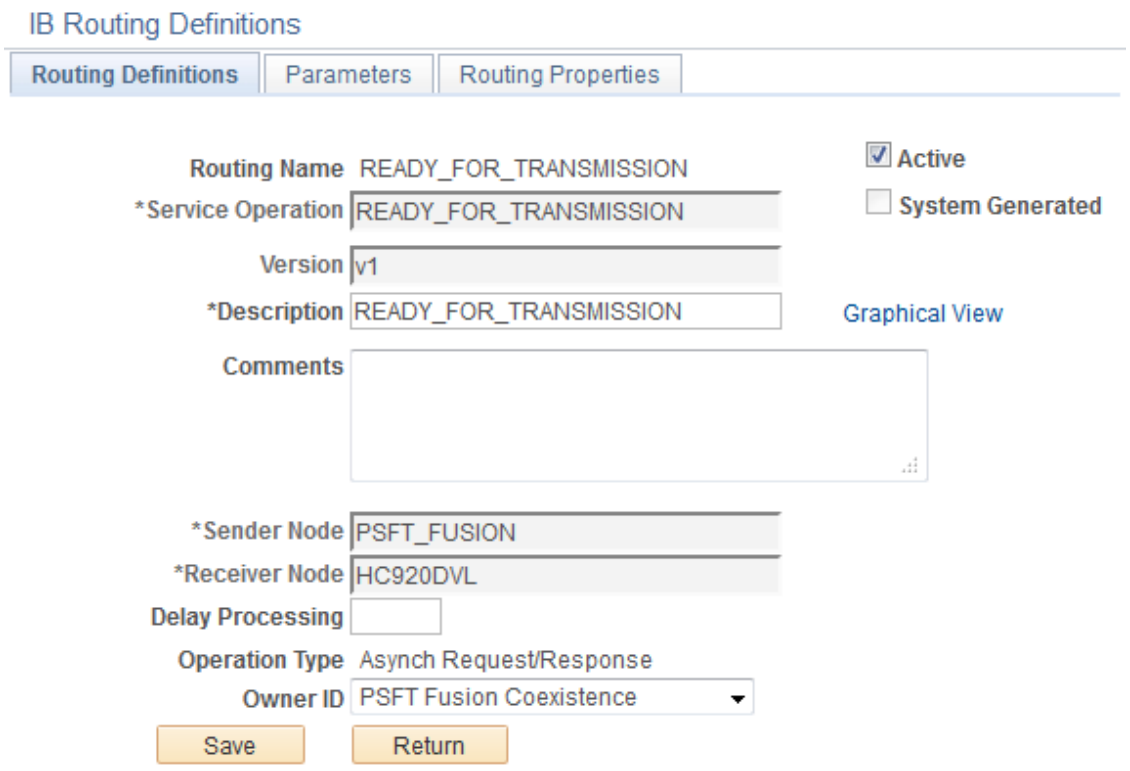
Click a routing link in the Name column.

This example illustrates the fields and controls on the Routing Definitions Page for the READY_FOR_LOAD routing.

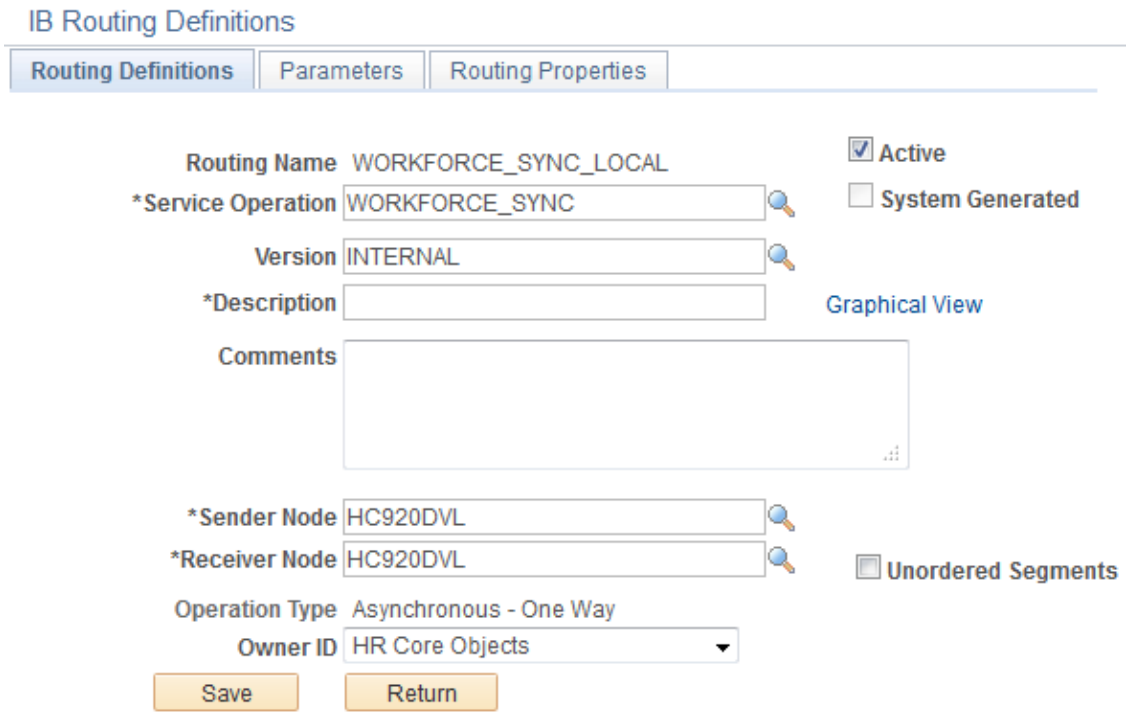


This example illustrates the fields and controls on the Routing Definitions Page for the READY_FOR_TRANSMISSION routing.

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This example illustrates the fields and controls on the Routing Definitions page for the WORKFORCE_SYNC_LOCAL routing.



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READY_FOR_LOAD and READY_FOR_TRANSMISSION

To activate the delivered routings for the READY_FOR_LOAD and READY_FOR_TRANSMISSION service operations, select the **Active** check box for each service operation's routing.

WORKFORCE_SYNC_LOCAL

Select the **Active** check box to activate the WORKFORCE_SYNC_LOCAL routing. In addition, enter your local node in the **Sender Node** and **Receiver Node** fields.

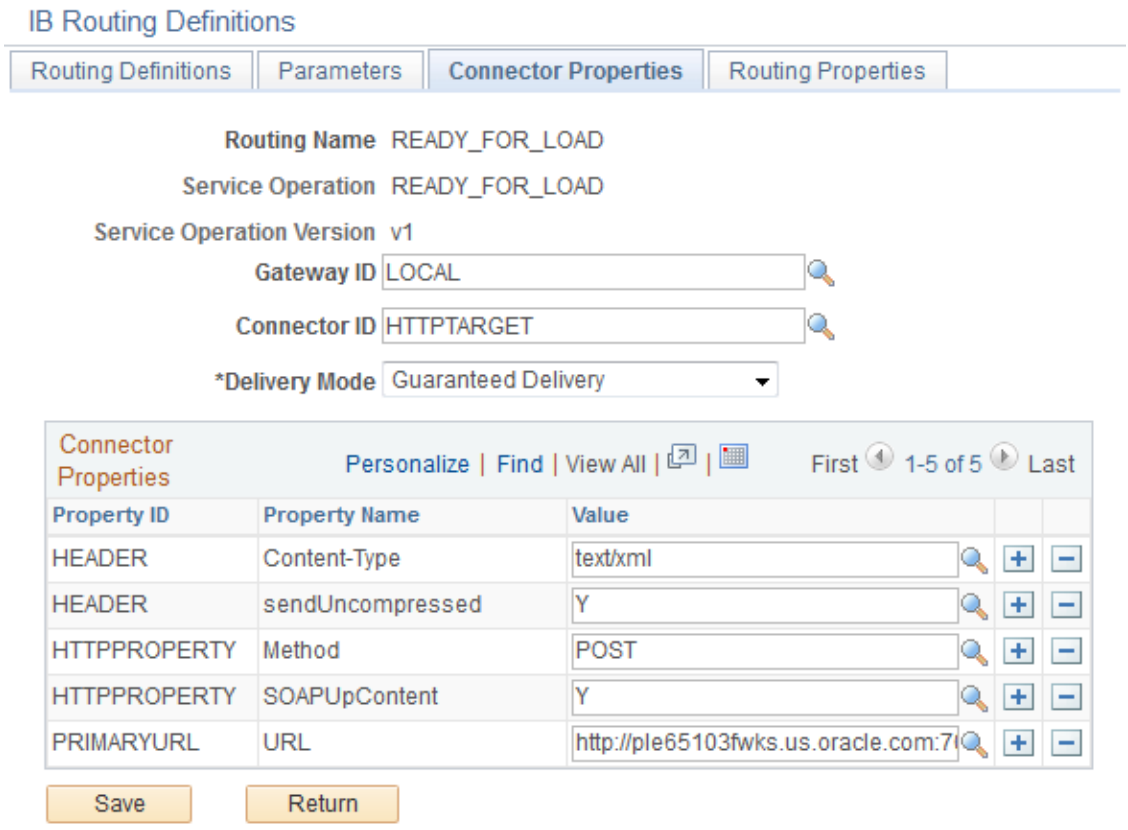
Connector Properties Page

Use the Connector Properties page (IB_ROUTINGDEFNCON) to configure routing connector properties.

Navigation:

Click the Connector Properties tab from the Routing Definition page.

This example illustrates the fields and controls on the Connector Properties page.



Add the following connector properties for the READY_TO_LOAD routing:

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Property ID	Property Name	Value
HEADER	Content-Type	text/xml
HEADER	sendUncompressed	Y
HTTPPROPERTY	Method	POST
HTTPPROPERTY	SOAPUpContent	Y
PRIMARYURL	URL	The URL that you use for your Fusion EndPoint URL. **Note:** The URL you enter here must have a location that can be pinged from your PeopleSoft system. Verify this when you set up your connection. In addition, this URL must be the Fusion end point URL, which should be provided by your Fusion cloud ops team.

This is an example of the Fusion EndPoint URL: https://hcgg-test.hcm.us2.oraclecloud.com/soa-infra/services/default/HcmCommonBatchLoaderCoreInboundLoaderComposite/inboundloaderprocess_client_ep

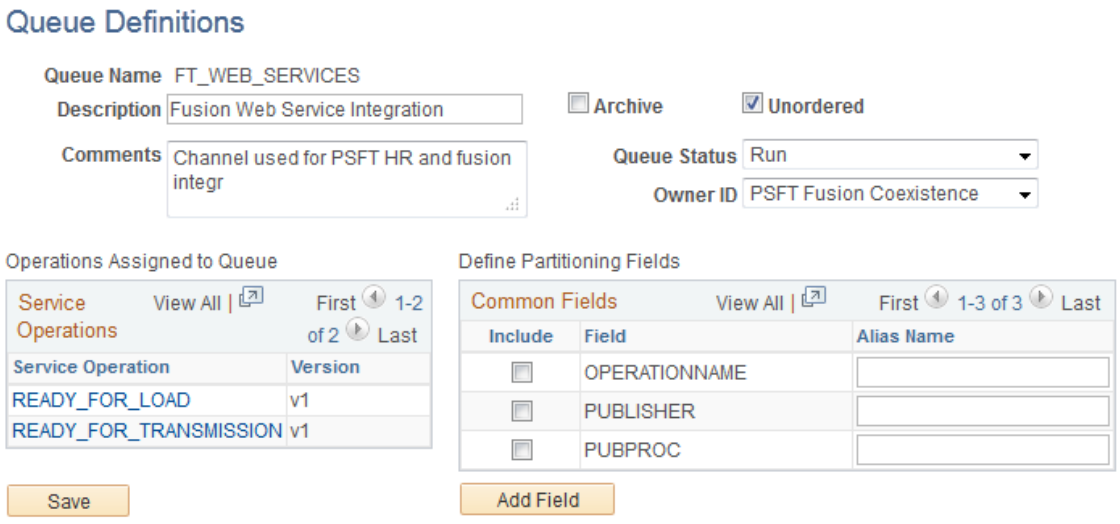
Queue Definitions Page

Use the Queue Definitions page (IB_QUEUEDEFN) to activate delivered queues.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Queues**

This example illustrates the fields and controls on the Queue Definitions page.



To activate a queue, select the *Run* value in the **Queue Status** field. In addition, ensure that the **Unordered** check box is selected. Make sure you do this for both the FT_WEB_SERVICES and PERSON_DATA queues.

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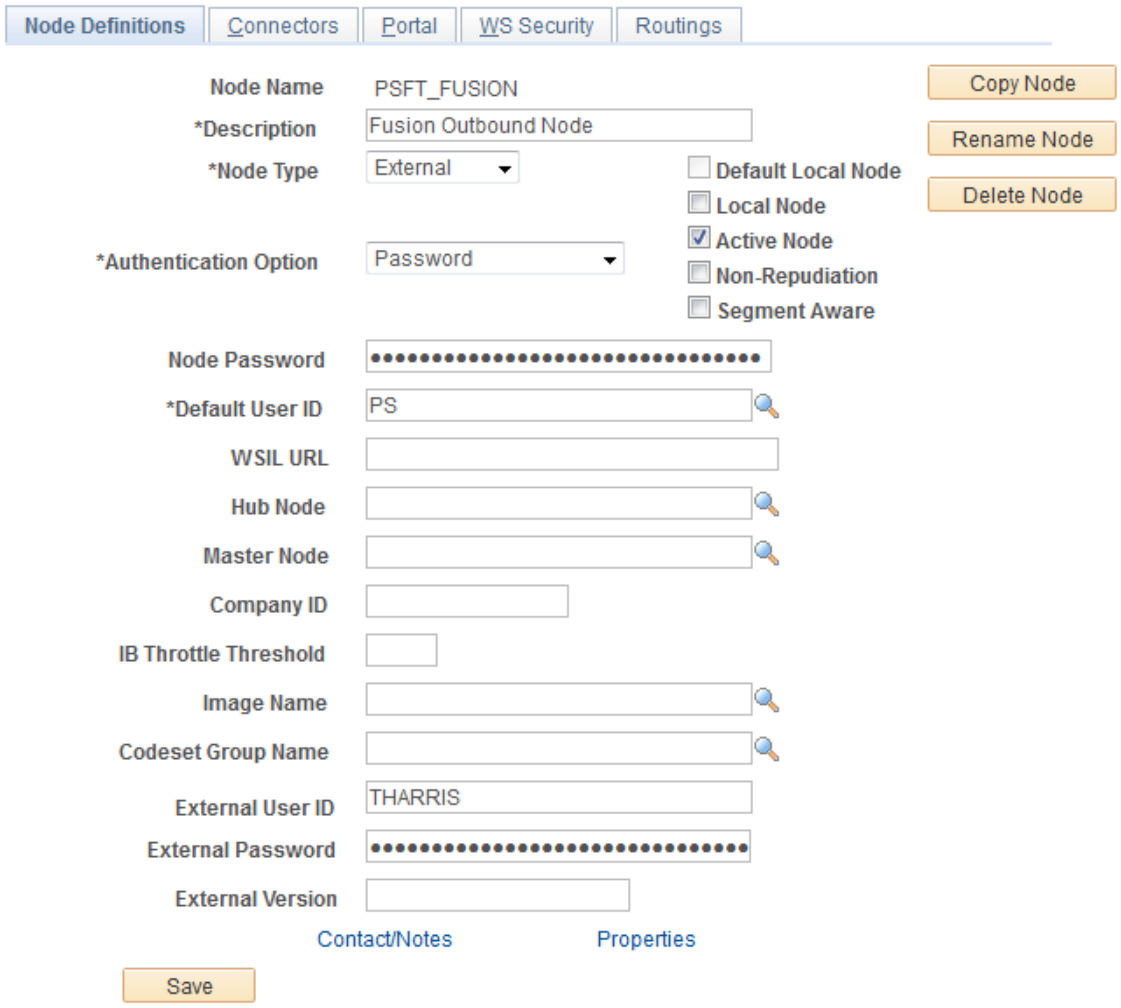
Node Definitions Page

Use the Node Definitions page (IB_NODE) to update node credentials.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Node**, and then **Node Definitions**

This example illustrates the fields and controls on the Node Definitions page.



For the PSFT_FUSION node, make sure the values of the **Authentication Option, Node Password, Default User ID, External User ID,** and **External Password** fields match the credentials defined for your Fusion system.

Connectors Page

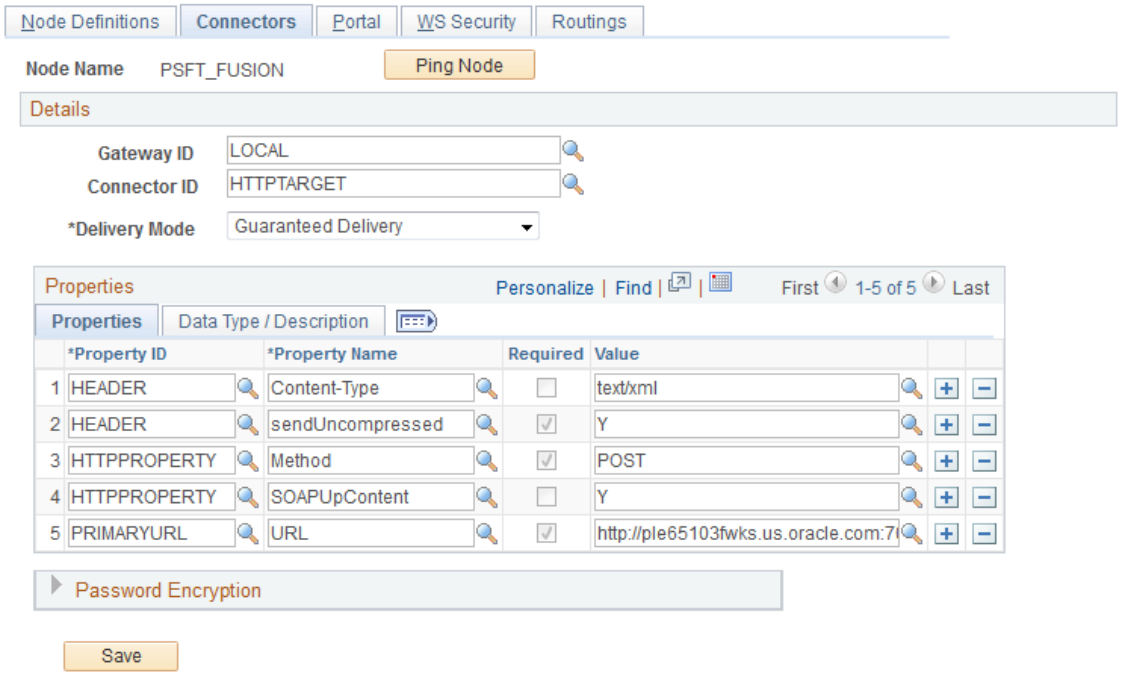
Use the Connectors page (IB_NODECONN) to configure node connector properties.

Navigation:

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PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Node**, and then **Connectors**

This example illustrates the fields and controls on the Connectors page.



Add the following connector properties for the PSFT_FUSION node:

Property ID	Property Name	Value
HEADER	Content-Type	text/xml
HEADER	sendUncompressed	Y
HTTPPROPERTY	Method	POST
HTTPPROPERTY	SOAPUpContent	Y
PRIMARYURL	URL	The URL that you use for your Fusion EndPoint URL.

WS Security Page

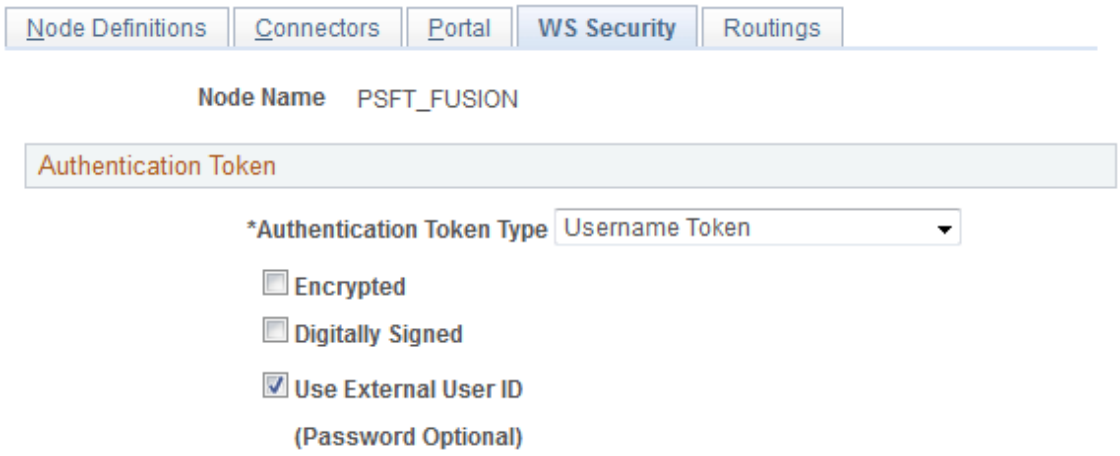
Use the WS Security page (IB_NODESECURITY) to update node security.

Navigation:

PeopleTools, and then **Integration Broker**, and then **Integration Setup**, and then **Node**, and then **WS Security**

This example illustrates the fields and controls on the WS Security page.

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Field or Control	Description
Authentication Token Type	Select the *Username Token* value.
Authentication Token Type	Make sure this check box is selected.

Managing Roles and User Profiles for the Coexistence

To have access to all of the functionality associated with the PeopleSoft HCM 9.2 to Fusion Talent Management and Workforce and Compensation coexistence, user IDs must be associated with the correct permission lists and roles.

Pages Used to Manage Roles and User Profiles

Page Name	Definition Name	Usage
Permission Lists Page	ROLE_CLASS	Confirm permission lists for coexistence-related roles.
Roles Page	USER_ROLES	Add the coexistence-related roles to user IDs.

Permission Lists Page

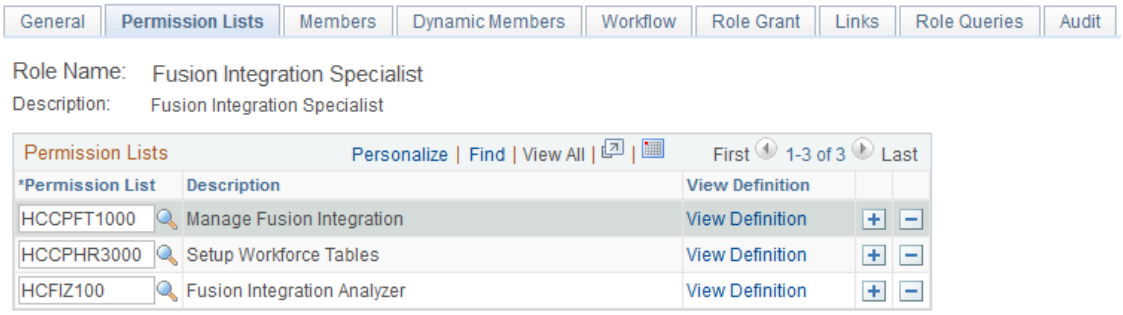
Use the Permission Lists page (ROLE_CLASS) to confirm permission lists for coexistence-related roles.

Navigation:

PeopleTools, and then **Security**, and then **Permissions & Roles**, and then **Roles**, and then **Permission Lists**

This example illustrates the fields and controls on the Permission Lists page.

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Fusion Integration Specialist Permission Lists

For the Fusion Integration Specialist role, confirm that the following permission lists are added in the **Permission Lists** group box:

- *HCCPFT1000* (Manage Fusion Integration)
- *HCCPHR3000* (Setup Workforce Tables)
- *HCFIZ100* (Fusion Integration Analyzer)

EOTF_ADMIN Role Permission Lists

For the EOTF_ADMIN role, confirm that the following permission lists are added in the **Permission Lists** group box:

- *EOTF1000* (Transform Framework Setup)
- *EOTF1100* (Transform Framework Data Admin)
- *EOTF1200* (Transform Framework Runtime)

Roles Page

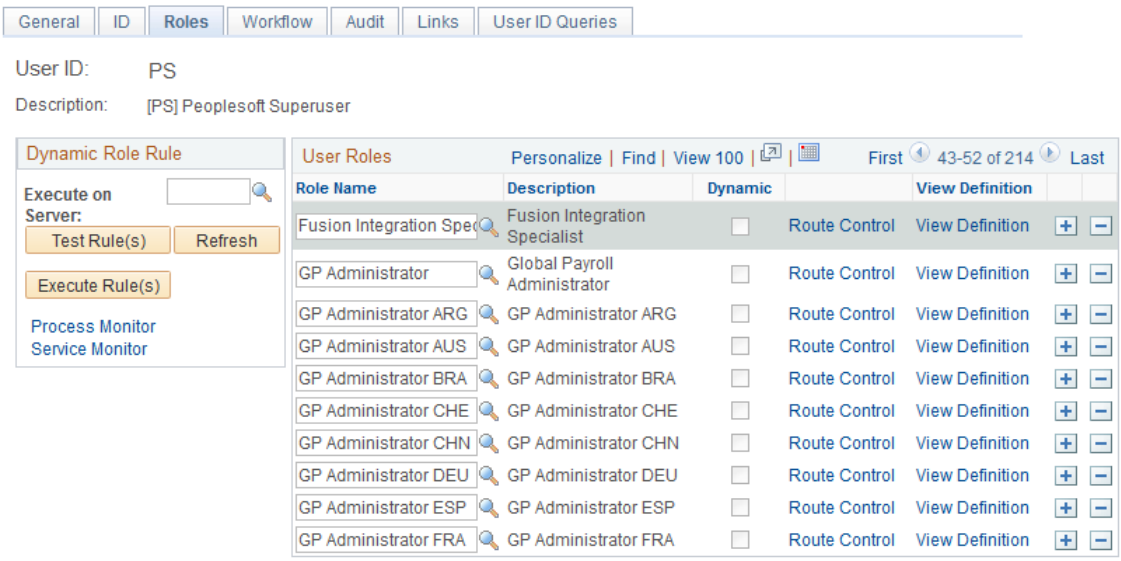
Use the Roles page (USER_ROLES) to add the coexistence-related roles to user IDs.

Navigation:

PeopleTools, and then **Security**, and then **User Profiles**, and then **User Profiles**, and then **Roles**

This example illustrates the fields and controls on the Roles page.

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For user IDs that need to be able to administrate and run the integration processes, add the *Fusion Integration Specialist* and *HR Labor Comp Specialist* roles in the **User Roles** group box.

For user IDs that need to be able to set up and administrate transformation maps and values, add the *EOTF_ADMIN* (Transform Framework Admin) role in the **User Roles** group box.

> **Note**
>
> For user IDs that need only to update domain map values, you can add the role *EOTF_ANALYST* (Transform Framework Analyst) instead of *EOTF_ADMIN.*

Creating URL Objects for the FTP Servers

You must create a URL object for the FTP servers used for the PeopleSoft HCM to Fusion Talent Management and Fusion Workforce Compensation coexistence.

Pages Used to Create URL Objects for the FTP Servers

Page Name	Definition Name	Usage
URL Maintenance Page	URL_TABLE	Create URL objects for the FTP servers

URL Maintenance Page

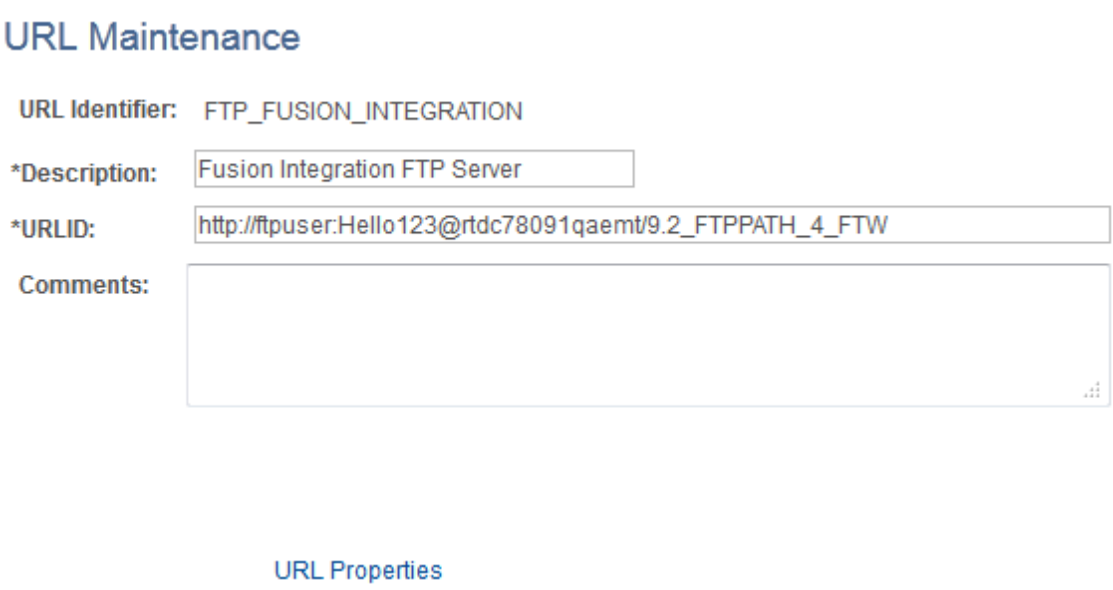
Use the URL Maintenance page (URL_TABLE) to create URL objects for the FTP servers.

Navigation:

PeopleTools, and then **Utilities**, and then **Administration**, and then **URLs**

This example illustrates the fields and controls on the URL Maintenance page.

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Use this page to define a URL object for an FTP server. You must define a separate URL object for each of the FTP servers used in the coexistence.

Configuring the Coexistence

Pages Used to Configure the Coexistence

Page Name	Definition Name	Usage
Configuration Page	FT_CONFIG	Configure outbound/inbound file and notification options.
Fusion Integration Installation Options Page	FT_INSTALL	Define the domains, configuration, and data filter options for your Fusion integration.
Job Action/Reason Sequence Page	FT_JOB_ACT_SEQ	Define the inbound interface sequence order for associated job actions and reasons.

Configuration Page

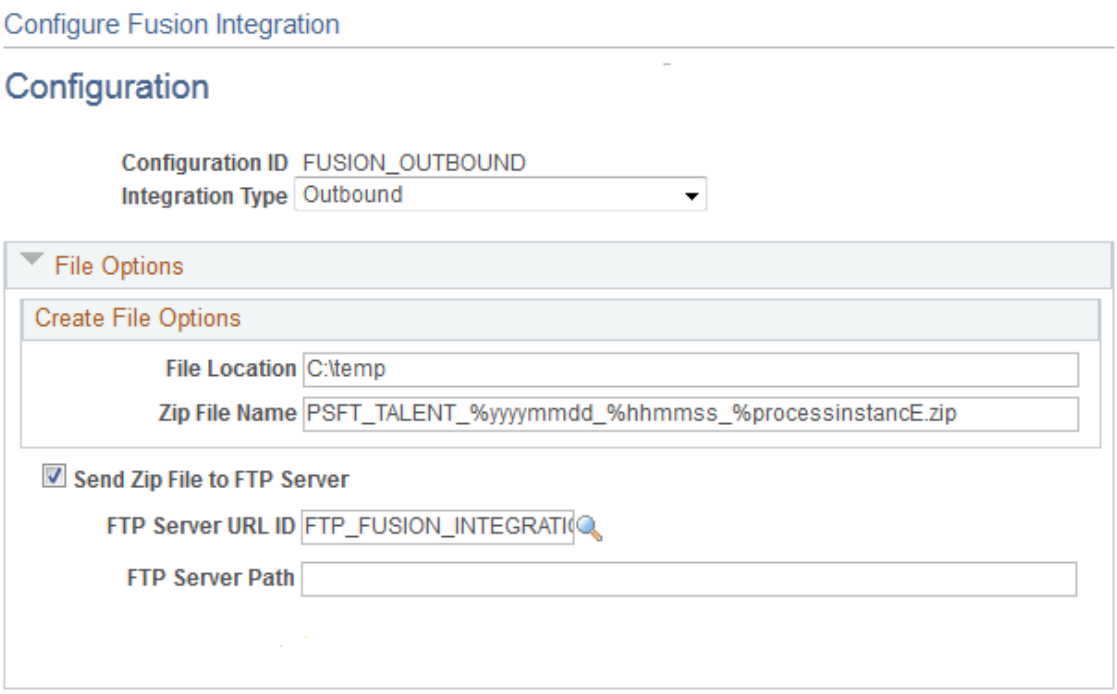
Use the Configuration page (FT_CONFIG) to configure outbound/inbound file and notification options.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Fusion Integrations**, and then **Talent/Workforce Compensation**, and then **Configure Fusion Integration**, and then **Configuration**

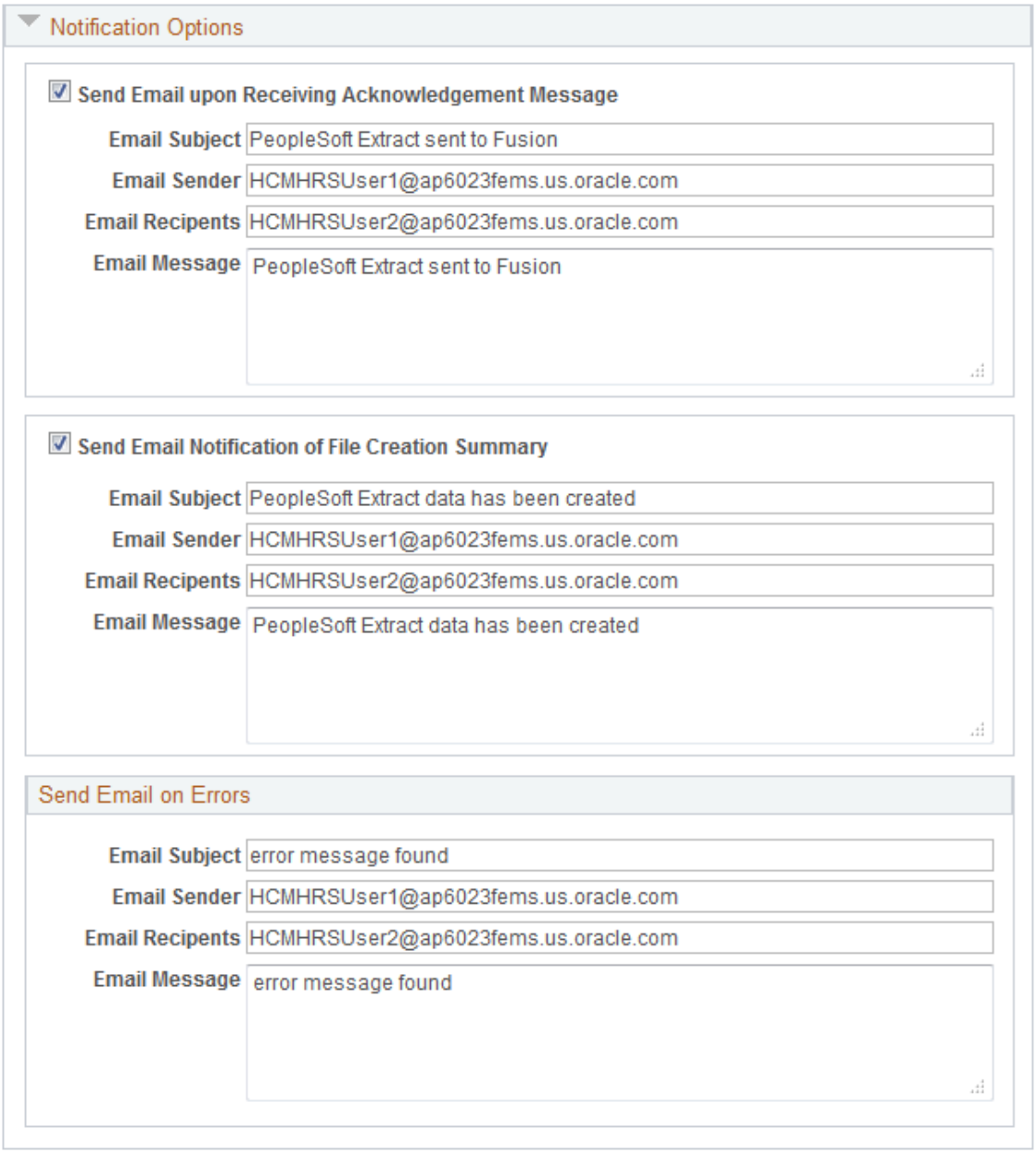
This example illustrates the fields and controls on the Configuration page.

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This example illustrates the fields and controls on the Configuration page.

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Use this page to create configuration IDs to define different default processing options for both outbound and inbound data processing. You can then use these configuration IDs to specify processing options for the various coexistence run control pages.

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Field or Control	Description
Integration Type	Select which type of integration you are configuring. Values are: *Inbound:* Integration for incoming data from Fusion Workforce Compensation. *Outbound:* Integration for data transformation and extract to send to Fusion. This selection affects which fields appear in the **File Options** and **Notification Options** group box. If you select *Inbound*, the group box containing the **File Location** and **Zip File Name** fields is labeled **Manual Load File Options** and the **Receive Zip File from FTP Server** check box appears in the **File Options** group box. In addition, the check box that appears in the **Notification Options** group box is labeled **Send Email on Successful File Load**. If you select *Outbound*, the group box containing the **File Location** and **Zip File Name** fields is labeled **Create File Options** and the **Send Zip File from FTP Server** check box appears in the **File Options** group box. In addition, two check boxes appear in the **Notification Options** group box labeled **Send Email upon Receiving Acknowledgement Message** and **Send Email Notification of File Creation Summary.**

File Options

The purpose of the fields in this group box depends on whether you are configuring an inbound or outbound integration. If you are configuring an inbound integration, these fields define how and from where you are receiving information from Fusion. If you are configuring an outbound integration, these fields define how and to where you are sending information to Fusion.

Field or Control	Description
File Location	Enter the existing file location used for the integration process. For the outbound process, this is the location where the system creates output files and the resulting zip file. For the inbound process, this is the location from which the system receives, extracts, and processes the inbound zip file. Therefore, the file location needs to be read-writable by the process. **Note:** The file location must be local to the PS scheduler server. In other words, it must be accessible at run time.

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Field or Control	Description
Zip File Name	Enter the name of the zip file that contains data received from Fusion or data that you send to Fusion. The zip file name can contain the following value place holders, which are replaced by actual values at run time: *%processinstance:* The process instance of the process. *%runcontrol:* The run control ID of the process. *%userid:* The ID of the user who runs the process. *%date:* The date of zip file creation. *%time:* The time of zip file creation. *%yyyymmdd:* The date of zip file creation in yyyymmdd format. *%hhmmss:* The time of zip file creation in hhmmss format. **Note:** The outbound zip file name must have the .zip extension, in lower case. Therefore, when you save the page, the system validates the name and updates it to include a lower case .zip if necessary. You can override the zip file name specified for a configuration ID on the run control pages using the **Output Zip File Override** field.
Send Zip File to FTP Server	Select to enter FTP server details for sending data to Fusion. If you select this check box, the FTP Server URL ID and FTP Server Path fields appear. In production, this check box should remain selected to automatically send the outbound data to the Fusion FTP server. If this option is deselected then the program creates the zip file, but does not send the file to the Fusion FTP server. Instead, the file is placed in the location specified in the **File Location** field. You might deselect this check box during test or to otherwise inspect the file before sending it to Fusion. In addition, the system does not call the web services used to communicate the creation of the file when this option is deselected.

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Field or Control	Description
Receive Zip File from FTP Server	If you select this check box, the system automatically retrieves the inbound zip file from the FTP server from the path specified in the **FTP Server Path** field and moves it to the location specified in the **File Location** field. If you deselect this check box, the system expects that the inbound zip file has already been copied into the file location. **Note:** If you use the web service to automatically load the file, the system uses the inbound default configuration ID specified on the Fusion Integration Installation Options. Typically you will want to select this check box and provide the FTP information on that configuration ID in order to automatically retrieve the file from the FTP server.
FTP Server URL ID	Enter the URL ID of the FTP server to which you send data bound for Fusion or from which you receive data from Fusion.
FTP Server Path	Enter the path of the FTP server to which you send data bound for Fusion or from which you receive data from Fusion.

Notification Options

The types of notifications that you can enable in this group box depend on whether the integration is inbound or outbound. Selecting any of the “Send Email” check boxes enables you to enter the subject, sender, recipients, and message text for the associated notification email.

Field or Control	Description
Send Email on Successful File Load	Select to send a notification email whenever incoming files are loaded successfully.
Send Email upon Receiving Acknowledgment Message	Select to send a notification email whenever the system receives an acknowledgement from Fusion that the outgoing file was received.
Send Email Notification of File Creation Summary	Select to send a notification email with a summary of information regarding the creation of each outgoing zip file.

> **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 Enterprise Components: Understanding Notification Composer.

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Send Email on Errors

Unlike the other notifications, emails sent when the system encounters errors with the sending or receiving of zip files are not optional. Enter the subject, sender, recipients, and message text for the error message.

Fusion Integration Installation Options Page

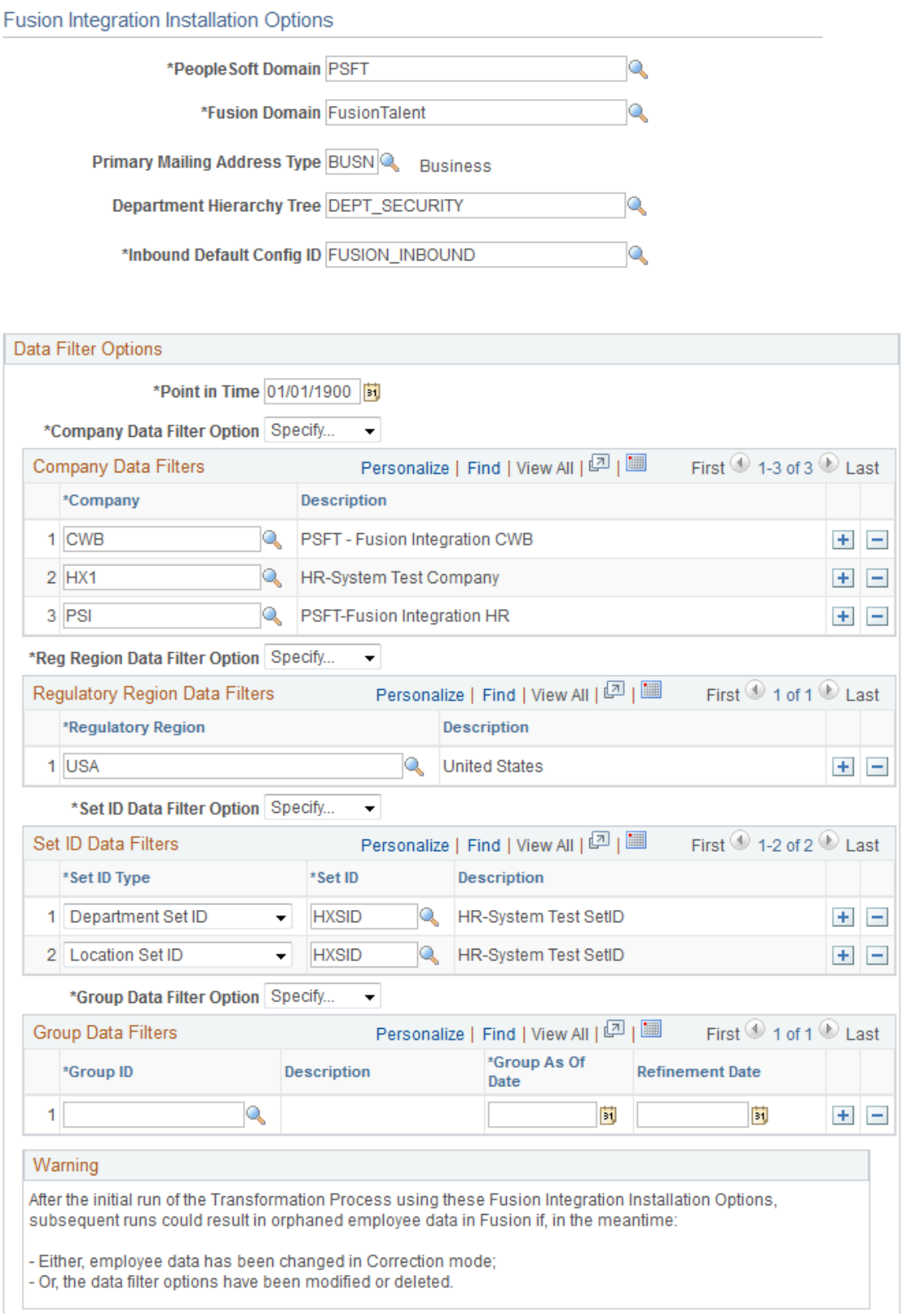
Use the Fusion Integration Installation Options page (FT_INSTALL) to define the domains, configuration, and data filter options for your Fusion integration.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Fusion Integrations**, and then **Talent/Workforce Compensation**, and then **Fusion Installation Options**, and then **Fusion Integration Installation Options**

This example illustrates the fields and controls on the Fusion Integration Installation Options page.

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> **Note**
>
> This page is required setup for Fusion integration.

Field or Control	Description
PeopleSoft Domain	The value in this field should be *PSFT* to correspond to the values used in the Application Integration Framework. All of the DVMs and XREFs are delivered with the *PSFT* domain value. If you change this value, then you must update the PeopleSoft domain definitions for all of the corresponding DVMs and XREFs.
Fusion Domain	This value in this field should be *FusionTalent* to correspond to the values used in the Application Integration Framework. All of the DVMs and XREFs are delivered with the *FusionTalent* domain value. If you change this value then you must update the Fusion domain definitions for all of the corresponding DVMs and XREFs.
Primary Mailing Address Type	Select the address type that the system uses to determine the primary mailing address for employees. The system uses this value as the default mailing address on the Fusion employee HR address record. In addition, the system uses this value to set the Person Address default in Fusion.
Department Hierarchy Tree	The system uses the value you enter here to determine the manager for employees in specific cases. The system determines an employee's manager based on: 1. The supervisor ID in the Job record. 2. The manager of the department if there is no supervisor ID in the Job record. 3. If the manager from steps 1 and 2 is the same as the employee, the system uses the department hierarchy tree specified here to find the parent department and retrieve the manager of the parent department.
Inbound Default Config ID (inbound default configuration ID)	Enter the ID of the default inbound configuration you want the system to use for inbound web service calls. See Receiving Data from Fusion.

Data Filter Options

The fields in this group box enable you to filter the employee data that the system extracts, transforms, and sends to Fusion when you run the FT_EXTRACT process.

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> **Note**
>
> Control data is not affected by these filter options.
>
> See Send HR Data to Fusion Page.

Field or Control	Description
Point in Time	The system extracts and publishes data only for employees whose **HR Status** is *Active* as of the date you enter here or later.
Company Data Filter Option	Define how the system filters by company when it extracts and publishes data to Fusion. Values are: *All:* The system extracts and publishes data for all companies. *Specify...:* The system extracts and publishes data only for the companies that you specify in the **Company Data Filters** grid, which becomes available when you select this value.
Reg Region Data Filter Option (regulatory region data filter option)	Define how the system filters by regulatory region when it extracts and publishes data to Fusion. Values are: *All:* The system extracts and publishes data for all regulatory regions. *Specify...:* The system extracts and publishes data only for the regulatory regions that you specify in the **Regulatory Region Data Filters** grid, which becomes available when you select this value. **Note:** Currently, it is only possible to specify US regulatory regions.
Set ID Data Filter Option	Define how the system filters by set ID when it extracts and publishes data to Fusion. Values are: *All:* The system extracts and publishes data for all set IDs. *Specify...:* The system extracts and publishes data only for the set IDs that you specify in the **Set ID Data Filters** grid, which becomes available when you select this value.
Group Data Filter Option	Define how the system filters by Groups when it extracts and publishes data to Fusion. Values are: *All:* The system extracts and publishes data for all groups. *Specify...:* The system extracts and publishes data only for the group IDs that you specify in the **Group Data Filters** grid, which becomes available when you select this value. **Note:** The system extracts and publishes data only for employees whose HR status is Active on or before the date in the Refinement Date field.

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> **Note**
>
> In selecting your data filters, make sure that the assignment supervisors for the filtered employees also meet your filter criteria. If the assignment supervisors do not meet the filter criteria, the system automatically selects the employees that reference those assignment supervisors for data transformation.
>
> To identify the supervisors of the filtered employees, you need to reference those employees' assignment records.

Job Action/Reason Sequence Page

Use the Job Action/Reason Sequence page (FT_JOB_ACT_SEQ) to define the inbound interface sequence order for associated job actions and reasons.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Fusion Integrations**, and then **Talent/Workforce Compensation**, and then **Fusion Inbound Sequence**, and then **Job Action/Reason Sequence**

This example illustrates the fields and controls on the Job Action/Reason Sequence page.

Job Action/Reason Sequence

Job Action/Reason Sequence — Personalize | Find | View All | First 1-7 of 7 Last

	*Action	Short Description	Reason Code	Action Reason	Sequence Order
1	HIR	Hire	PRI	First Job	1
2	PAY	Pay Rt Chg	COL	COLA	2
3	PAY	Pay Rt Chg	MER	Merit	3
4	PAY	Pay Rt Chg	ADJ	Adjustment	4
5	PRO	Promotion	OPR	Outst Perf	5
6	DTA	Data Chg	CPR	Corrct-Pay	6
7	AWD	Award Mnt	ESP	SES Perf	7

This page is required only for receiving inbound compensation data from Fusion. Fusion can send multiple job actions and reasons back from Workforce Compensation. This page defines the sequence in which the system processes changes. The sequence is by action and action reason (reason code). Add all of the job actions and corresponding reason codes used by the inbound process.

Defining a Rating Model

Prior to migrating profile data to Fusion, you must define a specific rating model. The rating model represents a set of numeric codes for ranking an employee's degree of expertise or experience in a competency. This section discusses how to define the LANG rating model.

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Pages Used to Define a Rating Model

Page Name	Definition Name	Usage
Rating Model Page	RATING_MDL_TBL	Define the LANG rating model.

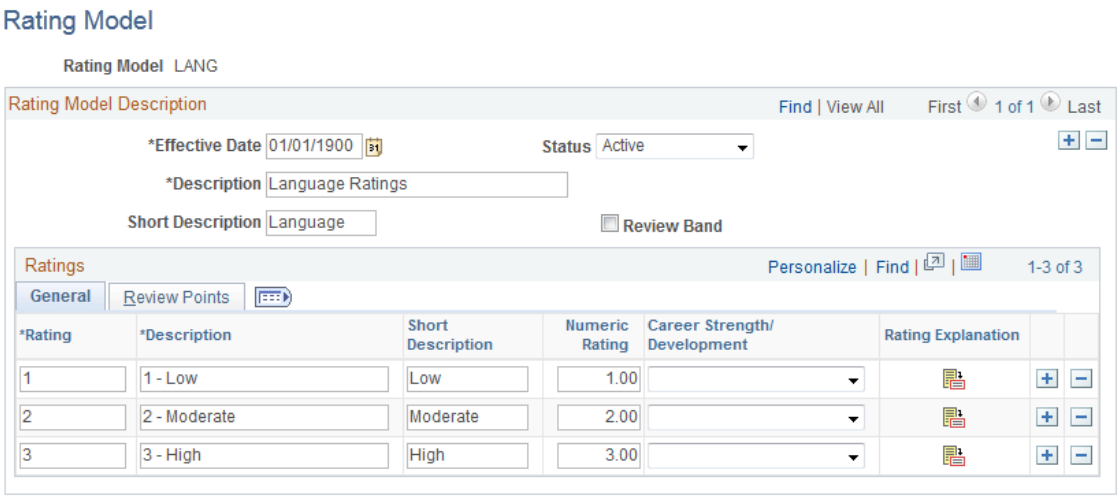
Rating Model Page

Use the Rating Model page (RATING_MDL_TBL) to define the LANG rating model.

Navigation:

Set Up HCM, and then **Product Related**, and then **Profile Management**, and then **Content Catalog**, and then **Rating Model**

This example illustrates the fields and controls on the Rating Model page.



Rating Model Description

Field or Control	Description
Effective Date	Enter an effective date of 01/01/1900.
Status	Set the status to *Active*.
Description	Enter a description of Language Ratings.
Short Description	Enter a short description of Language.
Review Band	Leave this check box deselected.

General Tab

Enter three rows with the following values:

Rating	Description	Short Description	Numeric Rating
1	1 - Low	Low	1.00

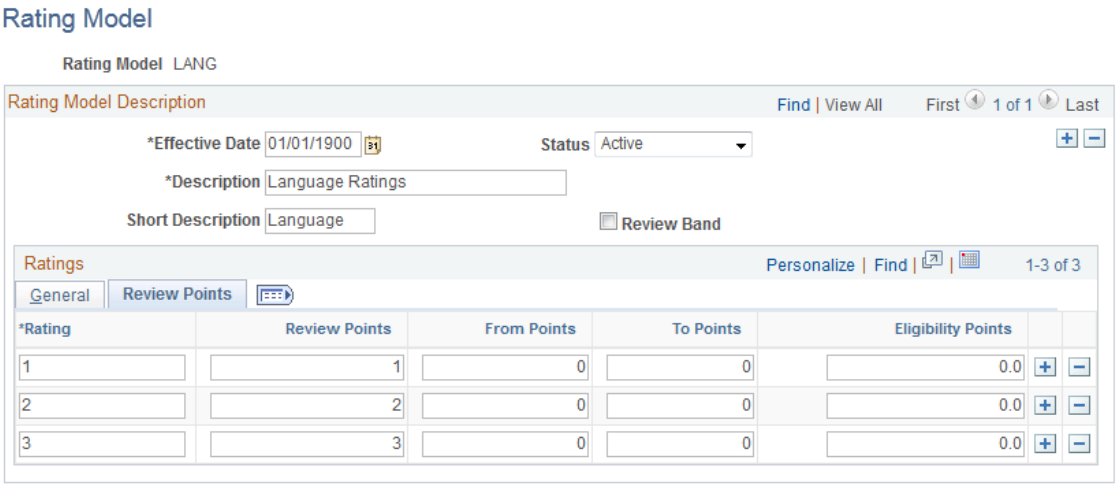
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Rating	Description	Short Description	Numeric Rating
2	2 - Moderate	Moderate	2.00
3	3 - High	High	3.00

> **Note**
>
> Leave the Career Strength/Development field blank for all three rows.

Review Points Tab

This example illustrates the fields and controls on the Review Points tab on the Rating Model page.



Enter the following values for the three ratings you entered on the General tab:

Rating	Review Points	From Points	To Points	Eligibility Points
1	1	0	0	0.0
2	2	0	0	0.0
3	3	0	0	0.0

Analyzing PeopleSoft HCM Source Data

Before sending any PeopleSoft HCM data to Fusion, you can run the Source Data Analyzer reports to identify any PeopleSoft HCM source data that is not compatible with Fusion.

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Pages Used to Analyze PeopleSoft HCM Source Data

Page Name	Definition Name	Usage
Run Source Data Analyzer Page	FMEV_RUN	Generate reports that identify PeopleSoft HCM source data that is incompatible with Fusion.

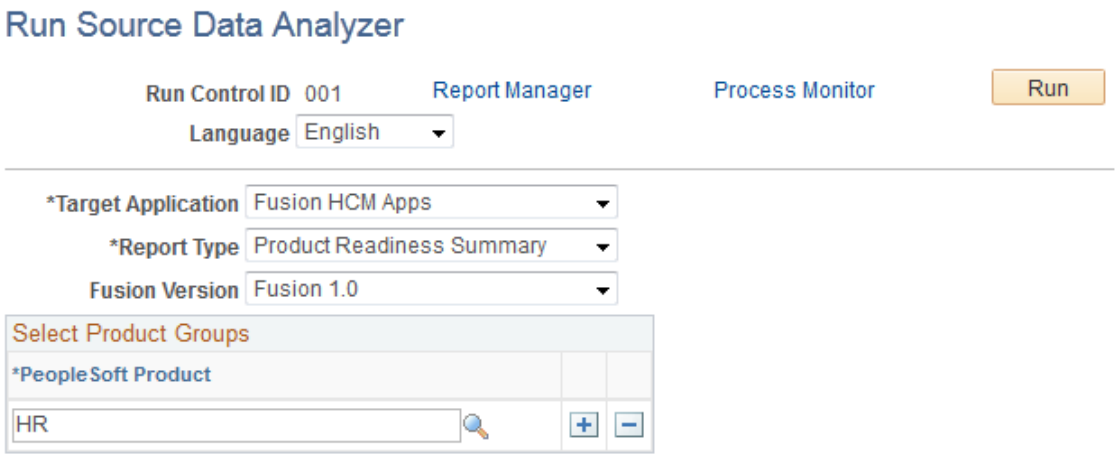
Run Source Data Analyzer Page

Use the Run Source Data Analyzer page (FMEV_RUN) to generate reports that identify PeopleSoft HCM source data that is incompatible with Fusion.

Navigation:

Set Up HCM, and then **Common Definitions**, and then **Integration Reports**, and then **Source Data Analyzer**, and then **Run Source Data Analyzer**

This example illustrates the fields and controls on the Run Source Data Analyzer page.



You can use this page to generate two different types of reports: Product Readiness Summary and Product Readiness Detail.

The Product Readiness Summary report generates a PDF file that provides a description of all the reports along with an error count for each report.

Depending on the Report ID that you select, the Product Readiness Detail report generates either a PDF file or a Microsoft Excel file containing detailed information for each error. The Product Readiness Detail report also includes a summary section that is identical to the Product Readiness Summary report.

Field or Control	Description
Target Application	Select *Fusion HCM Apps*.
Report Type	Select whether you want to generate a *Product Readiness Summary* or *Product Readiness Detail* report.

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Field or Control	Description
Fusion Version	Select the version of Fusion with which you are integrating.
PeopleSoft Product	Select your PeopleSoft Product. Values are: *HR* (Human Resources Core) and *PRO* (Profiles).
Report ID	Select the specific detail report that you want to generate. This field is available only if you select *Product Readiness Detail* in the **Report Type** field.

Sending Data to Fusion

Pages Used to Send Data to Fusion

Page Name	Definition Name	Usage
Send HR Data to Fusion Page	FT_XTRCT_RUN_CNTL	Send core HR data to Fusion.
Progress Reporting Page	FT_PROG_RPT	View details of the integration objects processed by the extraction process. This page displays the progress for both objects that are in process and objects that are completed.
Migrate Profile Data Page	FT_X_RUN_CNTL_TP	Migrate Profile data to Fusion.

Send HR Data to Fusion Page

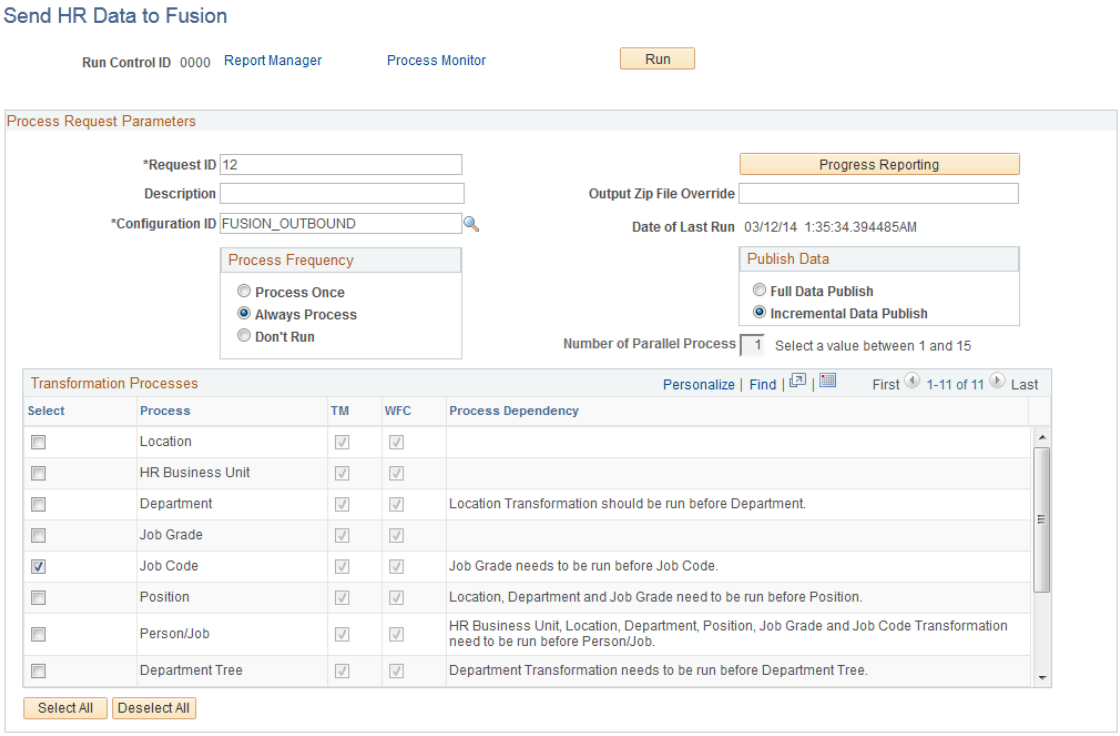
Use the Send HR Data to Fusion page (FT_XTRCT_RUN_CNTL) to send core HR data to Fusion.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion Integration**, and then **Talent/Workforce Compensation**, and then **Send HR Data to Fusion**

This example illustrates the fields and controls on the Send HR Data to Fusion page.

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Process Request Parameters

Use the fields in this group box to define the high level parameters for the transformation process.

> **Note**
>
> The **Process Frequency** group box is a standard component of run control pages for Application Engine processes. You will almost always want the **Always Process** radio button selected.

Field or Control	Description
Request ID	Enter a unique ID for the request.
Description	Enter an optional description for the transformation process run.
Configuration ID	Enter an outbound configuration ID. This ID instructs the system what to name the resulting zip file along with where to post it. It also defines the notification options. See Configuration Page

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Field or Control	Description
Output Zip File Override	If you want to enter a file name that is different than the one specified by the selected configuration ID, enter it here. **Note:** The outbound zip file name must have the .zip extension, in lower case. Therefore, when you save the page, the system validates the name and updates it to include a lower case .zip if necessary.
Full Data Publish	Select to extract data for all employees.
Incremental Data Publish	Select to extract data only for employees who had a change to their Person- or Job-related entities after the last successful extract process. The incremental extract process includes employees with a Last Update Date Time that is greater than the last successful extract run time. **Note:** Incremental file load capability is supported only by File Based Loader. Customers who use HR2HR for loading data into Fusion should not run incremental extractions. The system extracts all of the rows corresponding to Person and Job, even when only one of the rows of data is updated or newly inserted. The system processes full data extraction every time for entities that are not related to Job, Person, or Salary. If an employee has only Person-related changes, the system sends only Person-related data in the incremental extract. If an employee has only Job-related changes, the system sends only Job-related data in the incremental extract. For job rows that are inserted in Correct History mode, Fusion handles the change by deleting subsequent rows for the employee.
Number of Parallel Process	You can execute the FT_EXTRACT Application Engine process in up to 15 parallel instances. Use this field to enter the number of parallel process instances you want to run. This field is available only if you select the **Full Data Publish** option. Parallel processing works only for Person- and Job-related entities. The system processes the other entities, such as Location and Department, in serial mode. **Note:** The maximum number of parallel instances that you can run depends on the PSAESRV max instance value in your process scheduler configuration and on the Application Engine Max concurrent value of the server definition. For optimum performance, select a **Number of Parallel Process** value based on your system's available memory. If any one of the parallel instances ends with a result of *No Success*, the parent application engine program also results in *No Success*.

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Field or Control	Description
Progress Reporting	Click to access the Progress Reporting page where you can view the details of the integration objects processed by the extraction process. See Progress Reporting Page

Transformation Processes

The fields in this group box determine the type of core HR data that the system processes when you click the **Run** button.

Field or Control	Description
Select	Select this check box next to each type of core HR data you want included in the transformation process.
Process	Lists the different processes for core HR data that can be included in the overall transformation process. There is a separate Application Engine process for each item listed here. Each process generates one or more flat files. FT_EXTRACT is the controlling program that calls each Application Engine process you select here.
Description	Enter an optional description for the transformation process run.
TM (Talent Management) and **WFC** (Workforce Compensation)	Indicate whether the data type applies to Fusion Talent Management or Fusion Workforce Compensation.
Process Dependency	Lists dependencies for certain types of data transformation. Pay close attention to these dependencies when selecting which types of data to include in the transformation.

Running the Transformation Process

Click the **Run** button to initiate the FT_EXTRACT Application Engine process. This process calls the Application Engine processes you select in the **Transformation Processes** group box to extract the specified data. It then transforms the data into a format readable by Fusion Talent Management and Fusion Workforce Compensation and posts it as a single zip file to the FTP server defined by the specified configuration ID.

You can review any errors that the process encounters on the Error Summary page. After reviewing those errors, you can rerun the FT_EXTRACT process if necessary.

> **Note**
>
> The FT_EXTRACT process filters the extracted employee data based on the data filter options defined on the Fusion Integration Installation Options page. It does not, however, apply these data filter options to control data.

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> **Note**
>
> The FT_EXTRACT process does not support data values that contain the pipe (|) character.

Related Topics

- Fusion Integration Installation Options Page
  Use the Fusion Integration Installation Options page (FT_INSTALL) to define the domains, configuration, and data filter options for your Fusion integration.
- Transformation Error Review - Error Summary Page
  Use the Transformation Error Review - Error Summary page (FT_ERR_LOG_REVIEW) to review transformation errors for inbound and outbound processes.

Progress Reporting Page

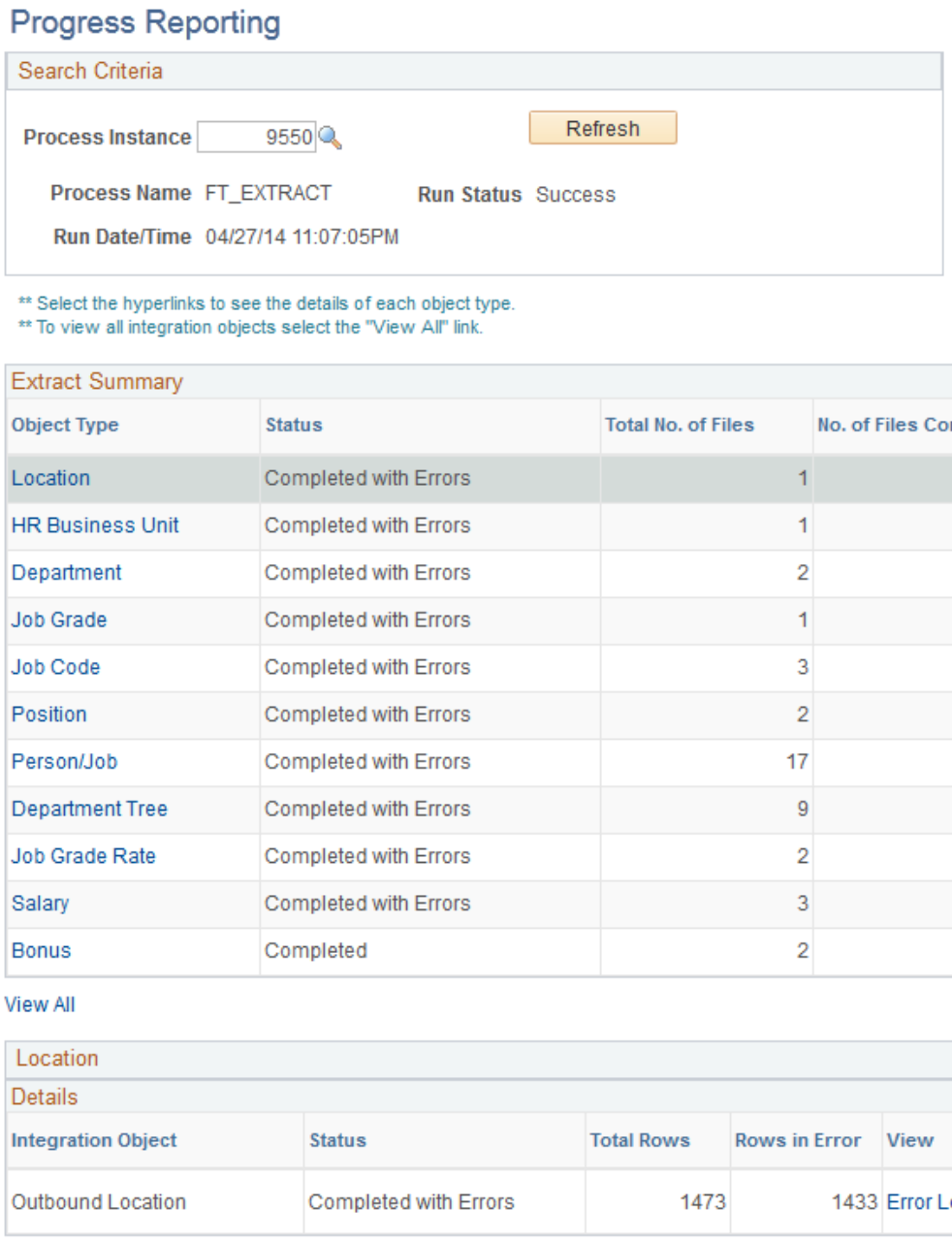
Use the Progress Reporting page (FT_PROG_RPT) to view details of the integration objects processed by the extraction process.

Navigation:

- **Workforce Administration**, and then **Collective Processes**, and then **Fusion Integration**, and then **Talent/Workforce Compensation**, and then **Fusion Extraction Progress**
- Click the Progress Reporting button on the Send HR Data to Fusion page.

This example illustrates the fields and controls on the Progress Reporting page.

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Field or Control	Description
Object Type	Click to view details about the object type in a group box at the bottom of the page. The group box lists each integration object associated with the object type, along with its status, the total rows, and the number of rows in error.
Error Log	For integration objects with rows in error, click this link to access the Transformation Error Review - Error Summary page for the corresponding process instance and integration object.

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Related Topics

- Transformation Error Review - Error Summary Page
  Use the Transformation Error Review - Error Summary page (FT_ERR_LOG_REVIEW) to review transformation errors for inbound and outbound processes.

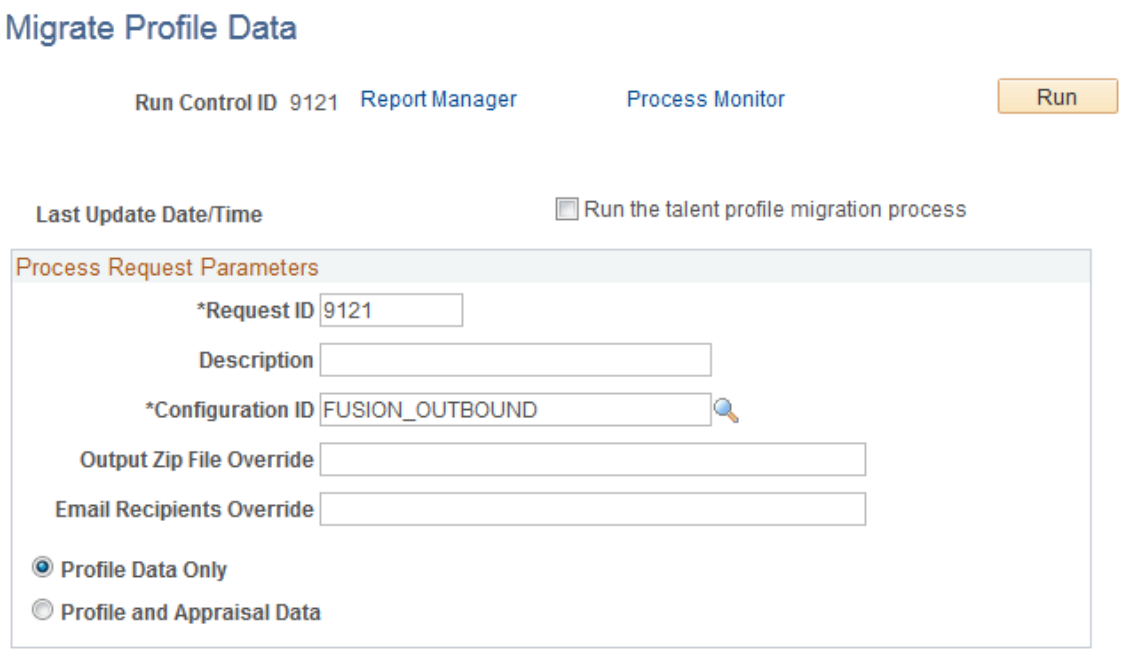
Migrate Profile Data Page

Use the Migrate Profile Data page (FT_X_RUN_CNTL_TP) to send core HR data to Fusion.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion Integration**, and then **Talent/Workforce Compensation**, and then **Migrate Profile Data**

This example illustrates the fields and controls on the Migrate Profile Data page.



Field or Control	Description
Run the talent profile migration process	Once you run the Talent Profile Migration process (FT_EXTRCT_TP), the **Run** button becomes unavailable. This is because you typically run this process only once. If it becomes necessary to run this process again, select the **Run the talent profile migration process** to re-enable the **Run** button. **Note:** The system does not pass any changes to profile data to Fusion after you have migrated your profile data from PeopleSoft HCM to Fusion. If you need to resend data for an employee, you must first set the FT_PROF_MIGR_DATE to Null on the FT_XTRCT_EMPLID record for that employee.

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Process Request Parameters

Field or Control	Description
Request ID	Enter a unique request ID for the migration.
Description	Enter an optional description for the migration.
Configuration ID	Enter an outbound configuration ID. This ID instructs the system what to name the resulting zip file along with where to post it. See Configuration Page
Output Zip File Override	If you want to enter a file name that is different than the one specified by the selected configuration ID, enter it here. **Note:** The outbound zip file name must have the .zip extension, in lower case. Therefore, when you save the page, the system validates the name and updates it to include a lower case .zip if necessary.
Email Recipients Override	If you want to enter an email recipient that is different than the one specified for email notifications upon file creation.
Profile Data Only and **Profile and Appraisal Data**	Select whether the process migrates profile data only or both profile and appraisal data.

Running the Migration Process

Click the Run button to initiate the FT_EXTRCT_TP Application Engine process. This process extracts profile data and appraisal data, transforms it into a format readable by Fusion Talent Management and Fusion Workforce Compensation and posts it as a single zip file to the FTP server defined by the specified configuration ID.

> **Note**
>
> The FT_EXTRCT_TP process filters the extracted employee-related talent profiles based on the data filter options defined on the Fusion Integration Installation Options page. It does not use these data filter options, however, when extracting non-employee-related talent profiles or talent profile content data.

Receiving Data from Fusion

These topics provide an overview of the inbound process and discuss receiving data from Fusion.

Pages Used to Receive Data from Fusion

Page Name	Definition Name	Usage
Receive Comp Data from Fusion Page	FT_XTRT_I_RUN_CNTL	Receive Compensation data from Fusion.

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Page Name	Definition Name	Usage
Cancel Compensation Data Page	FT_XTRT_I_D_RUNCNT	Delete Compensation data from inbound staging tables.
Inbound Status Monitor Page	FT_CWBOBJ_INSTATUS	Review inbound status and transaction errors.
<Integration Object> Detail Page	FT_VC_AWARD_DTL FT_SALARY_DTL FT_ASGN_AUDIT_DTL	Review errors associated with an inbound integration object.
<Integration Object> Detail Page	FT_VC_AWARD_SEC FT_SAL_DETAIL_SEC FT_ASGN_AUDIT_SEC	Correct errors to inbound integration objects.
<Integration Object> Audit Report Page	FT_VC_AWARD_SUM FT_SAL_AUD_RPT FT_ASGN_AUDIT_SUM	Review a summary of integration object changes.

Understanding the Inbound Process

The typical process flow for moving data from Fusion Workforce Compensation to PeopleSoft HCM 9.2 is as follows:

1. A Fusion administrator posts a zipped file of the Fusion Workforce Compensation data to the outgoing directory of the FTP server.
2. Fusion Workforce Compensation initiates the READY_FOR_TRANSMISSION asynchronous web service call to notify PeopleSoft HCM 9.2 that the file is available.
3. PeopleSoft HCM 9.2 retrieves the zipped file from the FTP server and extracts the data into staging tables.
4. A PeopleSoft HCM 9.2 administrator uses the Receive Comp Data from Fusion page to transform and load the data from the staging tables into the application source tables.

Optionally, a PeopleSoft HCM 9.2 administrator can bypass the automatic loading of the file through web service messages and manually load the file using the Receive Comp Data from Fusion page.

> **Note**
>
> The inbound process loads bonus data into the PS_VC_AWARD table. To pay out these bonuses, however, you must define an ad-hoc Variable Compensation plan in PeopleSoft 9.2 Variable Compensation and set up an integration between PeopleSoft 9.2 Variable Compensation and your PeopleSoft payroll application (PeopleSoft Payroll for North America or PeopleSoft Global Payroll).

Related Topics

- PeopleSoft Human Resources Manage Variable Compensation: Integrating with Payroll Applications
- Receive Comp Data from Fusion Page
  Use the Receive Comp Data from Fusion page (FT_XTRT_I_RUN_CNTL) to receive Compensation data from Fusion.

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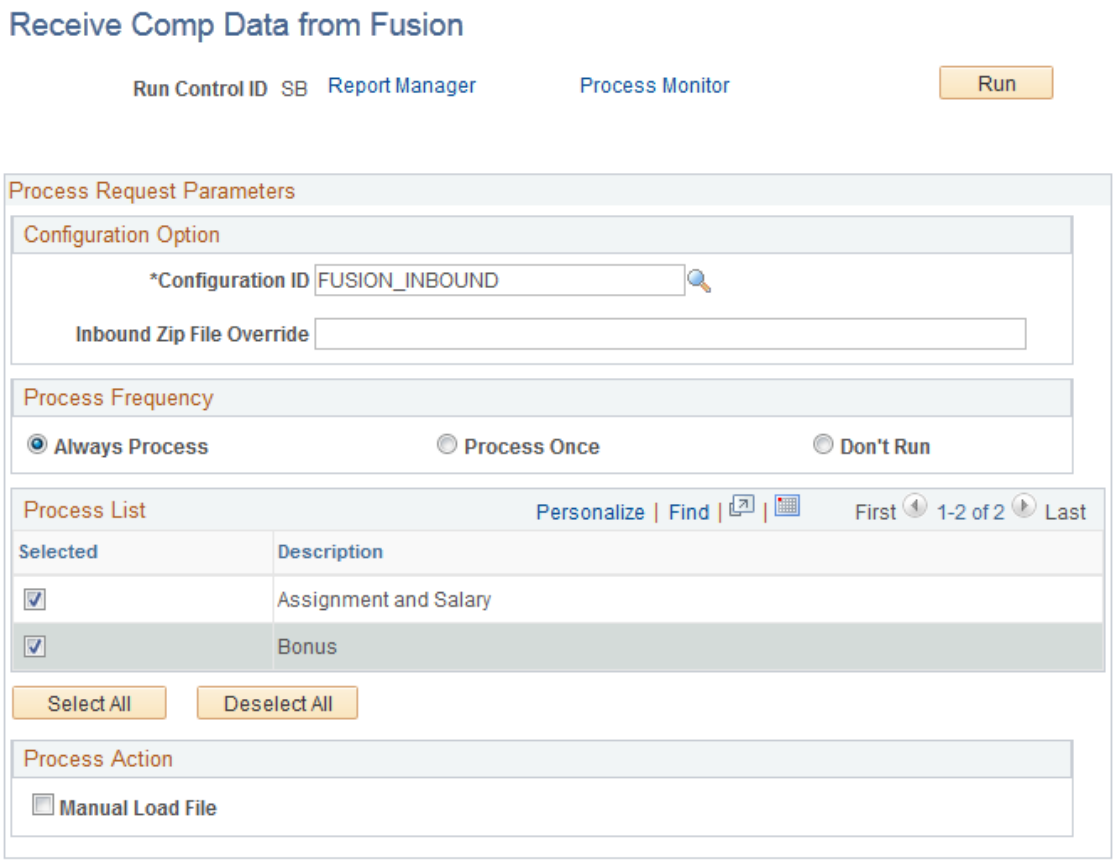
Receive Comp Data from Fusion Page

Use the Receive Comp Data from Fusion page (FT_XTRT_I_RUN_CNTL) to receive Compensation data from Fusion.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion integration**, and then **Talent/Workforce Compensation**, and then **Receive Comp Data from Fusion**

This example illustrates the fields and controls on the Receive Comp Data from Fusion page before a file has been loaded.



This is how the page appears if the data has not yet been loaded to the staging tables for the selected run control ID, either manually, or through web services.

> **Note**
>
> The **Process Frequency** group box is a standard component of run control pages for Application Engine processes. You will almost always want the **Always Process** radio button selected.

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Configuration Option

Field or Control	Description
Configuration ID	Enter an inbound configuration ID. This ID instructs the system how and where to find the posted zipped file containing the Fusion Workforce Compensation data. See Configuration Page.
Inbound Zip File Override	If you want to enter a file name that is different than the one specified by the selected configuration ID, enter it here.

Process List

Select the check box next to the type of Fusion Workforce Compensation data you want to load into the staging tables. Your options are: *Assignment and Salary* and *Bonus*.

Process Action

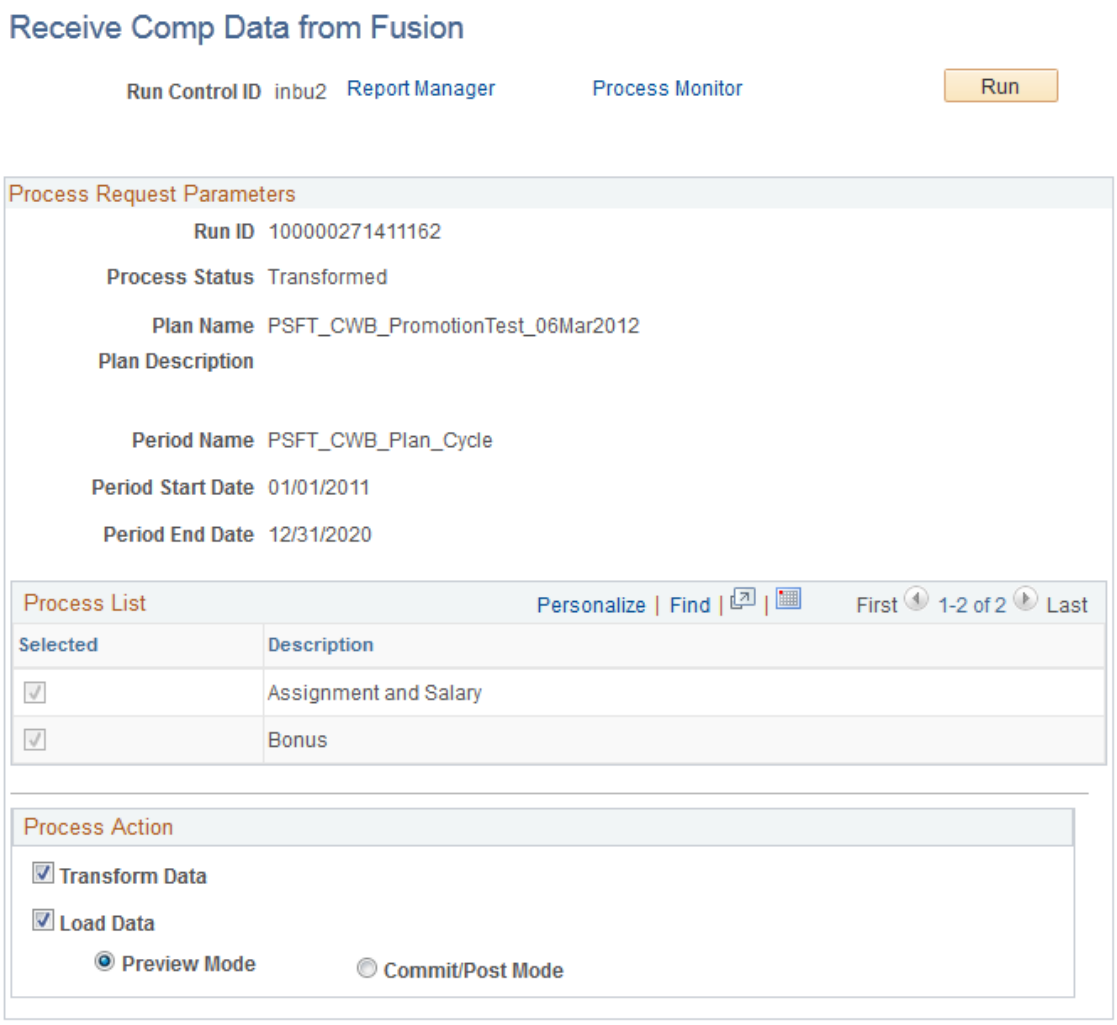
Only one process action is available: **Manual Load File**.

Loading the File

Click the **Run** button to run the FT_LOAD Application Engine process. With the **Manual Load File** check box selected, this process loads the data from the zipped Fusion Workforce Compensation file to staging tables within PeopleSoft HCM 9.2.

This example illustrates the fields and controls on the Receive Comp Data from Fusion page after the file has been loaded.

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This is how the page appears if the data has already been loaded to the staging tables for the selected run control ID, either manually, or through web services.

Process Request Parameters

Field or Control	Description
Run ID	Displays the unique Fusion process run ID.
Process Status	Displays the status of the data retrieved from Fusion Workforce Compensation. Possible values are: *Not Processed* *Loaded from File* *Transformed* *Previewed* *Manually Posted* *Posted*
Plan Name and **Plan Description**	Displays the name and description of the Fusion Workforce Compensation plan.

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Field or Control	Description
Period Name, Period Start Date, and **Period End Date**	Displays the name of the focal cycle period along with its starting and ending date.

Process List

Indicates the type of compensation data included in the process. This system uses the Logical Business Object (LBO) list included in the inbound web service message to determine which integration objects are included.

Process Action

Field or Control	Description
Transform Data	Select to transform the data in the staging tables to a format readable by PeopleSoft HCM 9.2.
Load Data	Select to load the data into the PeopleSoft application source tables. If you select this option, the **Preview Mode** and **Commit/Post Mode** options become available. If you select this check box and run the process for data that has not yet been transformed, the system will not load the data and give you and display a message.
Preview Mode	Selecting this option enables you to preview and validate the data before actually loading it into the application source tables. You use the Inbound Status Monitor page to preview and validate the data. See Inbound Status Monitor Page.
Commit/Post Mode	Select to commit to loading the data into the application source tables.

Transforming and Loading Data

Click **Run** to initiate the FT_LOAD process. Depending on which process actions you select, this process transforms the data in the staging tables and/or loads it into the application source tables.

Cancel Compensation Data Page

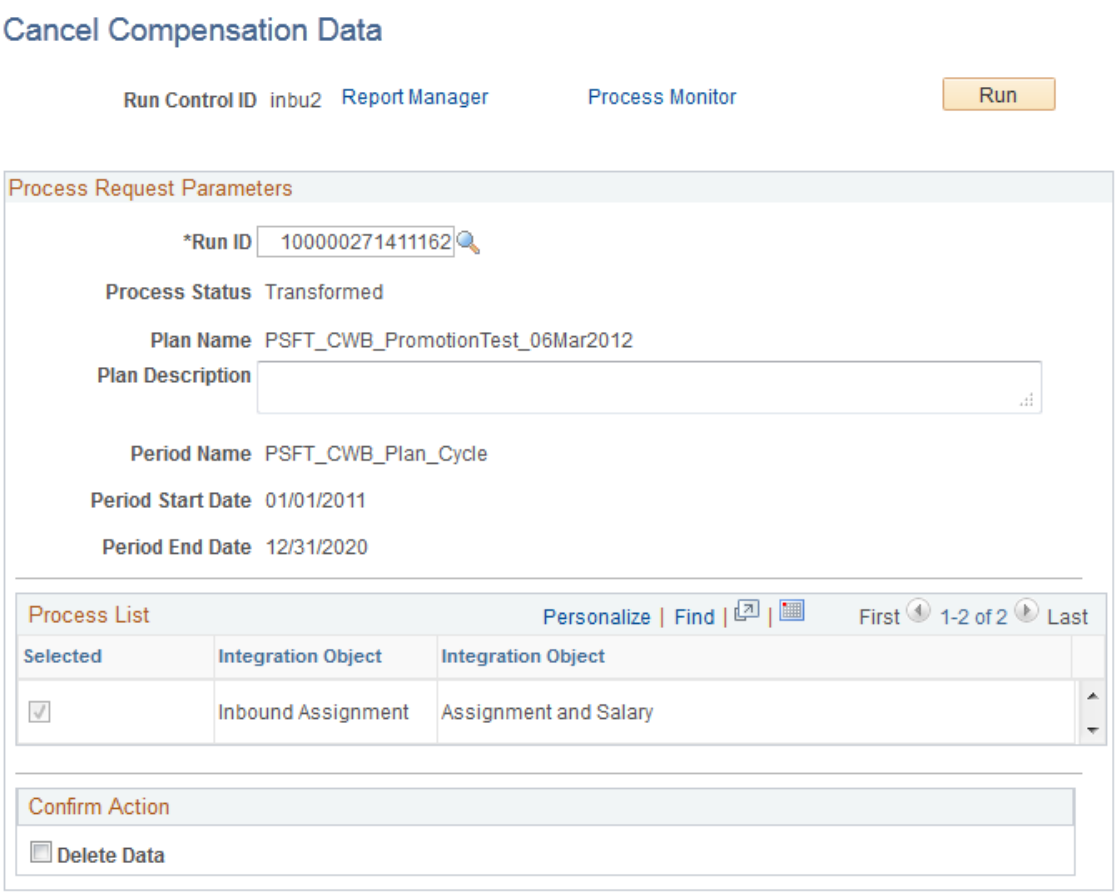
Use the Cancel Compensation Data page (FT_XTRT_I_D_RUNCNT) to delete Compensation data from inbound staging tables.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion integration**, and then **Talent/Workforce Compensation**, and then **Cancel Fusion Compensation**, and then **Cancel Compensation Data**

This example illustrates the fields and controls on the Cancel Compensation Data page.

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Process Request Parameters

Field or Control	Description
Run ID	Enter the unique Fusion process run ID for which you are deleting data.
Process Status	Displays the status of the data retrieved from Fusion Workforce Compensation.
Plan Name and **Plan Description**	Displays the name and description of the Fusion Workforce Compensation plan.
Period Name, Period Start Date, and **Period End Date**	Displays the name of the focal cycle period along with its starting and ending date.

Process List

Indicates the type of compensation data included in the process.

Confirm Action

Select the **Delete Data** check box to confirm that you want to delete the data from the selected run ID. If you click the **Run** button while this check box is deselected, the system gives you a warning message and does not allow you to initiate the process.

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Deleting Data

Click the Run button to initiate the FT_LOAD process. With the **Delete Data** check box selected, the system deletes the data associated with the selected run ID from the staging tables.

> **Note**
>
> This process has no effect on data that has already been loaded from the staging tables to the PeopleSoft application source tables.

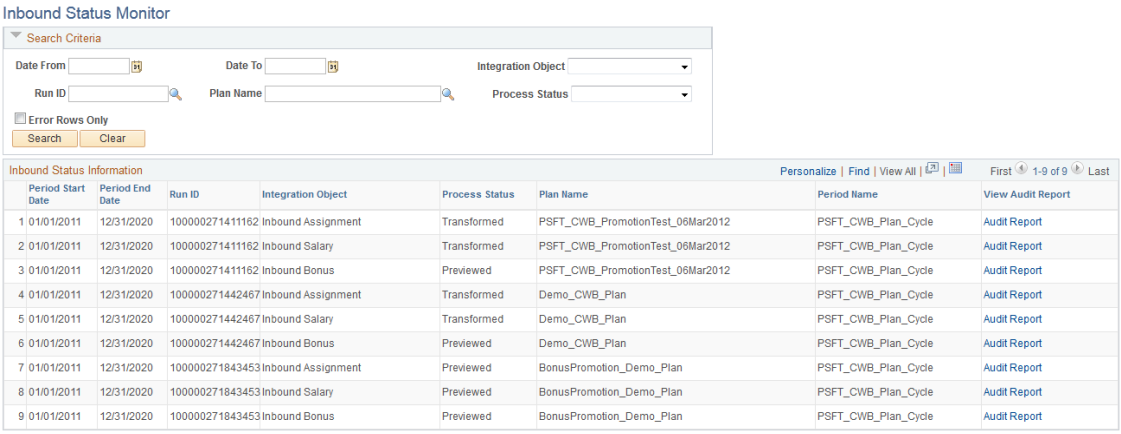
Inbound Status Monitor Page

Use the Inbound Status Monitor page (FT_CWBOBJ_INSTATUS) to review inbound status and transaction errors.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion integration**, and then **Talent/Workforce Compensation**, and then **Monitor Fusion Inbound Status**, and then **Inbound Status Monitor**

This example illustrates the fields and controls on the Inbound Status Monitor page.



Search Criteria

Use the fields in this group box to filter the process runs displayed in the **Inbound Status Information** group box.

Field or Control	Description
Date From and **Date To**	Use these fields to set a date range for the Fusion periods that you want to display.
Integration Object	Select the specific type of data you want to view.
Run ID	Enter the unique Fusion process run ID that you want to view.

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Field or Control	Description
Plan Name	Enter the name of the Fusion Workforce Compensation plan for which you want to view inbound process runs.
Process Status	Select the status for which you want to view inbound process runs.
Error Rows Only	Select to display only the inbound process runs with errors.
Search	Click to display the inbound process runs that match your search criteria.
Clear	Click to clear the fields in the **Search Criteria** group box.

Inbound Status Information

This group box displays the inbound process runs that meet your specified search criteria.

Field or Control	Description
Period Start Date and **Period End Date**	Displays the start and end date of the focal cycle period.
Run ID	Displays the unique ID of the process run.
Integration Object	Indicates the type of compensation data included in the process.
Process Status	Displays the status of the data retrieved from Fusion Workforce Compensation.
Plan Name	Displays the name of the Fusion Workforce Compensation plan.
Period Name	Displays the name of the focal cycle period.
All Error(s)	Click the **View Error(s)** link to access the <Integration Object> Detail Page for a process run.
Transformation Error(s)	Click the **DVM/XRef Error(s)** link to access the Transformation Error Review - Error Summary Page for a process run.
View Audit Report	Click the **Audit Report** link to access the <Integration Object> Audit Report Page for a process run.

<Integration Object> Detail Page

Use the <Integration Object> Detail page (FT_VC_AWARD_DTL, FT_SALARY_DTL, FT_ASGN_AUDIT_DTL) to review errors associated with an inbound integration object.

Navigation:

Click the View Error(s) link on the Inbound Status Monitor page.

Search Criteria

Use the fields in this group box to sort the integration object details displayed in the <Integration Object> Detail group box.

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> **Note**
>
> The actual fields available in this group box depend on the type of integration object for which you are viewing details.

Field or Control	Description
Employee ID	Enter the unique ID of the employee whose details you want to view.
Plan ID	Enter he unique ID of the compensation plan for which you want to view details.
Job Code Set ID	Enter the set ID of the job code for which you want to view details.
Company	Enter the company for which you want to view details.
Payout Period ID	Enter the ID of the payout period for which you want to view details.
Job Code	Enter the job code for which you want to view details.
Currency Code	Enter the currency code for which you want to view details.
Award Date	Enter the award date of the bonus details you want to view.
Award Value	Enter the value of the bonus details you want to view.
Change Status	Select a value to filter the details based on the manual changes that were made to them, if any. Values are: *Manually Posted* and *Value(s) Changed.*
Frequency	Enter a frequency for which you want to view details.
Action	Enter an action for which you want to view details.
Reason Code	Enter a reason code for which you want to view details.
Job Code Changes	Select to display only rows of details that include job code changes.
Salary Grade Changes	Select to display only rows of details that include salary grade changes.
Position Number Changes	Select to display only rows of details for which the position number value has changed.
All Rows	Select to display all rows of details that meet your search criteria.
Error Rows Only	Select to display only rows of details that meet your search criteria and include errors.
Search	Click to filter the displayed details according to your search criteria.
Clear	Click to clear all search criteria fields and rows of details.

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<Integration Object> Detail

This group box displays the details according to the search criteria you specify. Click the View/Update for a row to access the <Integration Object> Detail page where you can view and update data for the row.

<Integration Object> Detail Page

Use the <Integration Object> Detail page (FT_VC_AWARD_SEC, FT_SAL_DETAIL_SEC, FT_ASGN_AUDIT_SEC) to correct errors to inbound integration objects.

Navigation:

Click the View/Update link on the <Integration Object> Detail page.

Field or Control	Description
Manually Posted	Select this check box to indicate that you have manually posted (or entered) the data into the PeopleSoft system. The system will perform no further processing for this row. When you select this check box, all the fields on this page become unavailable.

<Integration Object> Detail

This group box displays details associated with the transaction. In addition, it enables you to manually update the **PeopleSoft Values** for some fields.

> **Note**
>
> The values that you can manually update on this page depend on the type of integration object for which you are viewing transaction details.

Error Details

If there are errors associated with the transaction, the page displays details regarding the errors here.

<Integration Object> Audit Report Page

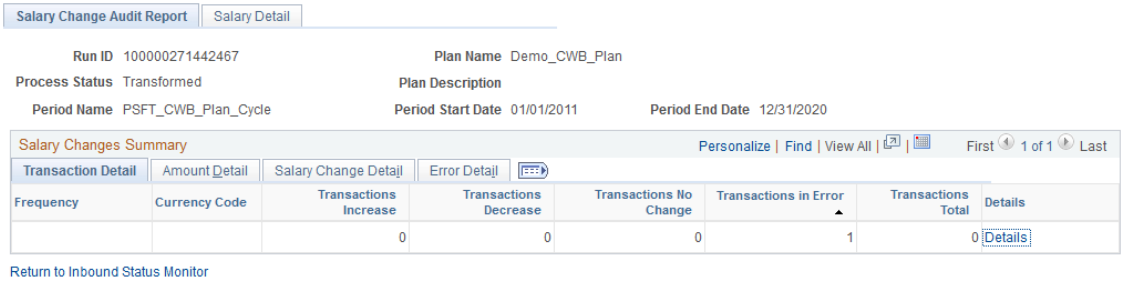
Use the <Integration Object> Audit Report page (FT_VC_AWARD_SUM, FT_SAL_AUD_RPT, FT_ASGN_AUDIT_SUM) to review a summary of integration object changes.

Navigation:

Click the Audit Report link on the Inbound Status page.

This example illustrates the fields and controls on the <Integration Object> Audit Report page.

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This page displays a summary of information associated with a specific row. You can click the Detail link to access the <Integration Object> Detail page for the row.

Reviewing Transformation Error Information

Pages Used to Review Transformation Error Information

Page Name	Definition Name	Usage
Transformation Error Review - Error Summary Page	FT_ERR_LOG_REVIEW	Review transformation errors for inbound and outbound processes.
Transformation Error Review - Error Data Page	FT_ERR_DATA_REVIEW	Review the details for a specific error.
Transformation Error Report Page	FT_ERR_LOG_RPT	Generate reports listing the errors for a specific transformation process instance.

Transformation Error Review - Error Summary Page

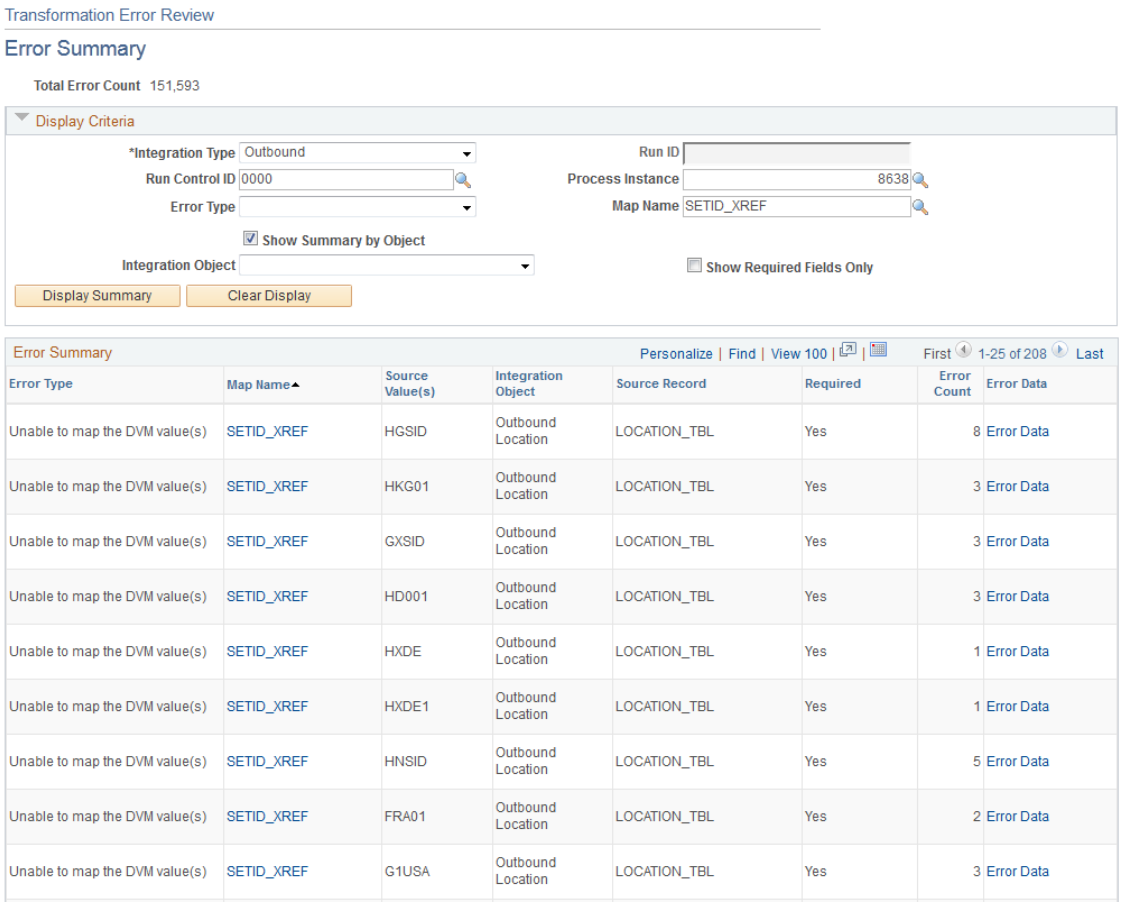
Use the Transformation Error Review - Error Summary page (FT_ERR_LOG_REVIEW) to review transformation errors for inbound and outbound processes.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion Integration**, and then **Talent/Workforce Compensation**, and then **Review Fusion Transform Error**

This example illustrates the fields and controls on the Transformation Error Review - Error Summary page.

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Display Criteria

Use the fields in this group box to filter and sort the errors that the system displays in the Error Summary group box.

Field or Control	Description
Integration Type	Select whether you want to view errors for *Inbound* or *Outbound* processes. If you select *Inbound*, the Run ID field becomes available.
Run ID	Enter a specific run ID for which you want to view errors. **Note:** This field applies to inbound errors only. It represents the Fusion Workforce Compensation process run ID.
Run Control ID	Enter a specific run control ID for which you want to view errors.
Process Instance	Enter a specific process instance for which you want to view errors.

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Field or Control	Description
Error Type	Select the type of errors you want to view. Possible values are: *Unable to load DVM map* *Duplicate Content Item Name* *Unable to map the DVM value(s)* *Employee with multiple jobs* *Entire object bypassed* *Missing reference object* *Multiple Salary Bases* *Position override* *Reference to object in error* *Unable to load XREF map* *Unable to map the XREF*
Map Name	Enter a specific value map for which you want to view errors.
Show Summary by Object	Select to group the errors in the **Error Summary** group box by **Integration Object**. This check box is selected by default. If you deselect it, the system groups the errors by **Map Name** and **Source Value(s)**. In addition, deselecting this check box causes the **Integration Object** and **Show Required Fields Only** to become unavailable.
Integration Object	Select a specific integration object for which you want to view errors.
Show Required Fields Only	Select to view only those errors that have a value of *Yes* in the **Required** column.
Display Summary	Click to display the errors that meet your selected display criteria.
Clear Display	Click to hide the **Error Summary** group box.

Error Summary

This group box displays all errors that meet your selected display criteria when you click the **Display Summary** button.

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Field or Control	Description
Error Type	Lists the type of error. Possible values are: *Unable to load DVM map* *Duplicate Content Item Name* *Unable to map the DVM value(s)* *Employee with multiple jobs* *Entire object bypassed* *Missing reference object* *Multiple Salary Bases* *Position override* *Reference to object in error* *Unable to load XREF map* *Unable to map the XREF*
Map Name	Lists the name of the value map associated with the error. If this name is displayed as a link, you can click it to access the Domain Value Map Page.
Source Value(s)	Lists the original source value associated with the error.
Integration Object	Lists the integration object associated with the error. The integration object represents the type of data being processed and whether it was outbound or inbound.
Source Record	Lists the table that originally contained the data associated with the error.
Required	Indicates whether the error row is associated with data that is required in order for the integration object to be sent to Fusion. If the value for a row is No, the system sets the target value to Null and allows the associated integration object to be sent to Fusion. Rows with a value of *Yes* (sometimes referred to as “hard errors”) prevent the system from sending the associated integration object to Fusion.
Error Count	Lists the actual number of errors associated with an error row in the summary.
Error Data	Click this link for an error row to access the Error Data page.

Understanding Transformation Errors

The following table provides explanations of the transformation errors that the FT_EXTRACT process can generate.

Transformation Error	Explanation
Unable to load DVM map	This error type is for future use.
Duplicate Content Item Name	Two JPM Catalog Item rows have the same Catalog Item Type (JPM_CAT_TYPE) value. The system bypassed these rows and did not send them to Fusion.

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Transformation Error	Explanation
Unable to map the DVM value(s)	While loading data into the .DAT output files, the process found no Fusion DVM map values that corresponded to the values set in the Populate Domain Value Maps page for a PeopleSoft object value. For example, let us assume that the LEGAL_ENTITY_XREF DVM has map values defined for the following companies: PSI, CWB, HX1, and GBI. While loading the .DAT files, the FT_EXTRACT process encounters a row of data with a company value of ACC. The process logs this row of data with the Unable to map the DVM value(s) error type.
Employee with multiple jobs	The process encountered an employee with two or more active jobs (PeopleSoft HCM accommodates employees with multiple jobs, but Fusion does not).
Entire object bypassed	One of the object rows, for example, Department, Location, or Assignment contained an error that forced the process to bypass it. Fusion cannot load incomplete data, so even if only one of the object rows contained an error, the system bypassed the entire object and all of its rows to avoid sending incomplete data to Fusion.
Missing reference object	The process encountered an object that references another object that is missing and/or has not been part of the migration process.
Multiple Salary Bases	An employee's current active row included two or more compensation rows (PeopleSoft HCM accommodates employees with multiple compensation rows, but Fusion does not).
Termination row updates	The process encountered an employee with an action row before a termination row on the same day. In this case, the process sends only the termination row to Fusion.
Position override	The process encountered an employee with overridden Position data.
Reference to object in error	A current row for an object contained a reference to an object that is to be bypassed and there is a reference to this object in another object.
Unable to load XREF map	This error type is for future use.
Unable to map the XREF	While loading data into the .DAT output files for an object the process found no GUID for an object referenced by the original object.

Transformation Error Review - Error Data Page

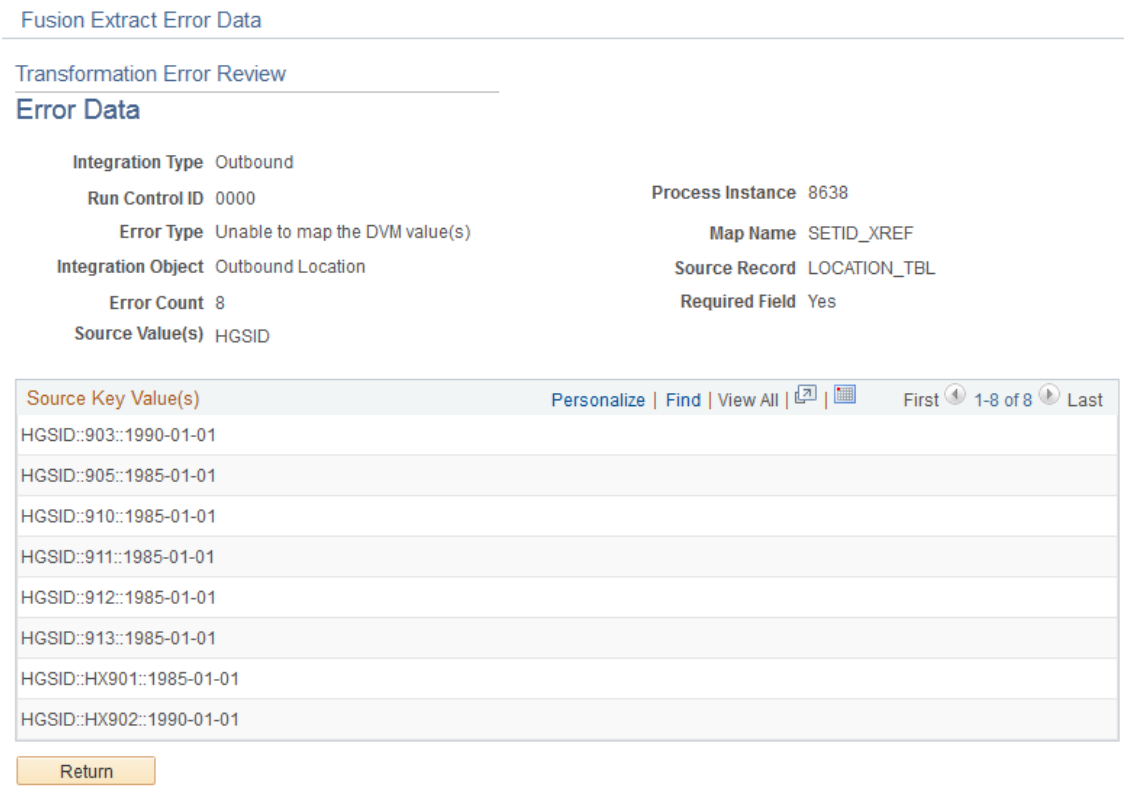
Use the Transformation Error Review - Error Data page (FT_ERR_DATA_REVIEW) to review the details for a specific error.

Navigation:

Click an Error Data link on the Transformation Error Review - Error Summary Page.

This example illustrates the fields and controls on the Transformation Error Review - Error Data page.

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This page displays all of the information displayed on the Error Summary page for the error row along with the **Source Key Value(s)** for the error, which you can use to locate the row in the source record.

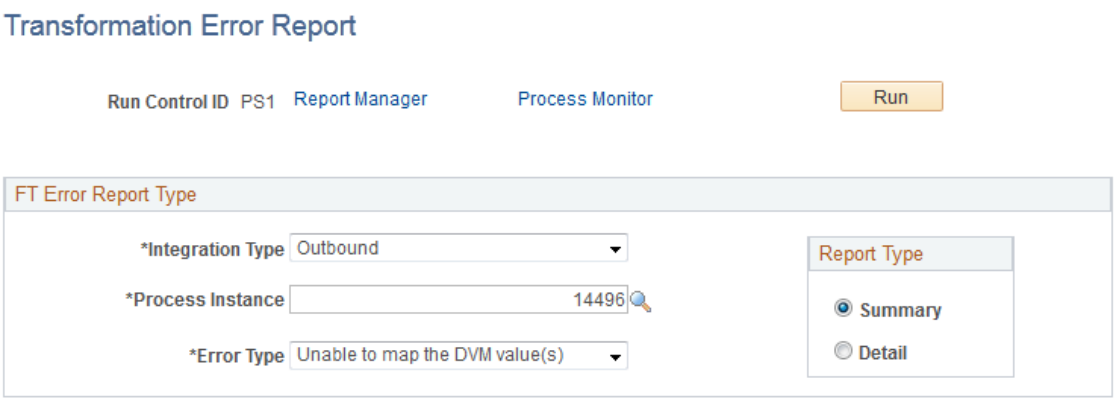
Transformation Error Report Page

Use the Transformation Error Report page (FT_ERR_LOG_RPT) to generate reports listing the errors for a specific transformation process instance.

Navigation:

Workforce Administration, and then **Collective Processes**, and then **Fusion Integration**, and then **Talent/Workforce Compensation**, and then **Report Fusion Transform Error**

This example illustrates the fields and controls on the Transformation Error Report page.



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Field or Control	Description
Integration Type	Select whether you want to generate a report for an *Inbound* or *Outbound* integration.
Process Instance	Enter the instance number of the process for which you are generating an error report.
Error Type	Select the Error Type for which you want to generate the report. Only error types logged for the selected process instance are available to select.
Group By	Select whether you want the report to group your results by *Business Unit*, *Department*, or *Location*. This field is available only if you select a report type of **Detail**.

Report Type

You can use this page to generate two types of reports: Summary or Detail.

Field or Control	Description
Summary	Select to generate a report that lists the error types that the process generated along with counts of rows that resulted in errors.
Detail	Select to generate a report that provides detailed information on all of the entities that generated errors.

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Group Build Implementation for Developers

Building Applications or Batch Programs that Include Group Build Functions

These topics discuss how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This topic discusses what a developer must do to use Group Build in the application that he or she is building. (We refer to this application as the client application.)

> **Note**
>
> Please read this entire topic before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

   Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build application. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table.*

   If you want a table for your application where you can add, delete, or modify rows, you must perform this optional step. Your table will be taken into account for the construction and purge processes of the Group Build application.

   There are two ways to set up your own table:

   a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

      This record becomes your client application result table.

   b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab». For example, if your result table is defined as DEPTID, define your modified query as follows:

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– All fields from GB_QRY_LINK_VW.

– All of your additional fields.

2. (Optional) Add two fields on the client application record to store the group ID and group as of date. If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

   In PeopleSoft Application Designer, add two fields to the client application record (MyClientModuleRecord):

   - The field GB_GROUP_ID for storing the Group ID.

     This field should prompt on GB_GROUP_TBL.

   - The field MyAsOfDate for storing the as of date of the group.

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.

   a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.

   b. Create a new field: MyClientModule_GEN_BTN.

   c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.

4. In PeopleSoft Application Designer, Include the work page GB_API_WRK in the client application component.

   a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.

   b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.

5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.

   a. Insert the view GB_QRY_LINK_VW (required).

   b. Insert the record(s) that are needed for joins and criteria.

   c. Write your query according to the Group Build limitations.

      See Group Build Query Limitations for Developers

   d. Add all necessary prompts on the criteria tab.

      Prompt values are bound using the GB_BIND API call.

   e. Verify that your query is PUBLIC.

   f. Save your query as MyDeveloperQueryName.

6. Add modified fields on the client application page.

   a. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.

   b. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.

   c. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.

7. Add PeopleCode to implement calls to Group Build API.

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> **Warning**
>
> All calls to Group Build API must be done from level 0 of your client application page.

a. Make calls to Group Build API in the FieldChange PeopleCode event.

b. Set the PeopleCode Event Properties to Application Server.

c. Select Application Server on the PeopleCode Event Properties page.

See PeopleCode API Functions.

8. Implement PeopleSoft Security to see if a group can be used in the component.

a. GB_GROUP_ID field must be on the page, and the recordfield properties must be set to prompt table edit on Record GB_GROUP_SEC_VW.

b. Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on level 0 of the page. The fields must be display-only and hidden.

PeopleCode API Functions

This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode. Specifies which API group, query name for refinement, and results table to use.

- Specifies which group, query name, results table to use.

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name,
result_table_⇒
name)
```

  - The parameter group_id is required.
  - The parameter AsOfDate is required.
  - The parameter query_name specifies a developer query name for refinement. It is optional. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).
  - The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

  - Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.
  - The parameter prompt_code must be defined as a prompt in the developer query.
  - The parameter value is required.

- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```


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  - Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.
  - The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

  ```
  &group_version_number = GB_EXEC(refresh_flag)
  ```

  - This API generates and executes the SQL statement.
  - It returns the version number of the generated group.
  - If the parameter refresh_flag is set to *Y,* the SQL statement is generated each time you call the function. If the refresh_flag is set to *N,* the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.

- Deleting the content of the result table.

  ```
  GB_DELETE()
  ```

- Disabling/enabling the generic workflow and the specific workflow.

  ```
  GB_SET_JOB_WF(job_name)
  ```

  - Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.
  - The parameter job_name is optional.
  - If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow topic.
  - Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
  - Providing a null job_name as parameter enables the generic workflow (workflow by default).
  - On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

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If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


/* Use this instruction if you plan to use GB_GRP_RES_TBL */


GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID,
MyClientModuleRecord.MyAsOfDate, «⇒
 », « ») ;


/* Bind all parameters for the default Query : The Effdt of JOB */


GB_BIND_DATE(Any Date ) ;


/* Execute the SQL and fill the group result table */


&MyVersion = GB_EXEC ( « Y » ) ;   /* <Y> Forces to rebuild the group even if
one⇒
 is available */


* The list of employees for the group is now available for your own usage */


/* The code presented above populates the Group Result table GB_GRP_RES_TBL */


/* You can now use this record to populate your scrolls or can be used as a
join⇒
 for a SQL Statement */


/* ADD YOUR CODE HERE  */


/* Clear the group result table only in the case you know the group will not
be⇒
 used anymore*/


[GB_DELETE() ;]
```


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Scenario 2

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If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


/* Give your result table name to GB_DECLARE  (STEP 1 must have been
previously⇒
 performed) and your Query Name if  you created one */


GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.
MyAsOfDate,⇒
 « MyDeveloperQueryName », «MyClientModuleResultTable ») ;


/* Bind all parameters for MyDeveloperQueryName */


/* Each prompt in MyDeveloperQueryName must be binded */


GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;


[…]


GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;


/* Or use local variable for binding */


GB_BIND(« :n », &MyLocalVarn) ;


/* Execute the SQL and fill the group result table */


&MyVersion = GB_EXEC ( « N » ) ;   /* <N> Don't rebuild the group if it is⇒
 available */


/* Employee group is now available for your module */


/* This populates the group result table MyClientModuleResultTable  */


/* You can now use this record to populate your scrolls or work on this
```


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```
table… */


/* ADD YOUR CODE HERE  */


/* Clear the group result table only in the case you know the group will not
be⇒
 used anymore*/


[GB_DELETE() ;]
```

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This topic discusses what a developer has to do to use Group Build in the application that he or she is building, using PeopleSoft Application Engine. (We refer to this application as the client application.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

   In this record, add:

   - The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.
   - The field VERSIONGBQDM.
3. In PeopleSoft Application Engine, create a new program.

   This program must contain:

   - A retrieval of parameters.

     ```
     Step01.SQL:


     %Select(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT,
     AE_GBP002_AET.GB_⇒
     REFINE_DATE)  SELECT GB_GROUP_ID  , GB_EFFDT  , GB_REFINE_DATE  FROM
     PS_RUN_⇒
     ```


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```
CNTL_HR  WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID =
%Bind(RUN_CNTL_ID)
```

- A call to Group Build PeopleCode API.

```
Step02.PeopleCode:


Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API
FieldFormula;


Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;


Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API
FieldFormula;


Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API
FieldFormula;


GB_SET_PANELGROUP("APPENGINE");   /* This is due to a tools issue and
will⇒
 disappear as soon as the TPRD is closed */


GB_RESET();


&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT,
"", "");


&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);


AE_GB_API_AET.REFRESH_SW.Value = "N";   /* You can see that the
REFRESH_FLAG is⇒
 set to "N"  Equivalent to GB_EXEC("N"). As we can't call a section
with direct⇒
 parameters, we must use the cache record of the AE API to perform
this⇒
 operation */
```


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- A call to Group Build AE API GB_EXEC.

```
Step02.Call Section:


Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC
Directly.⇒
 You will always use the GB_API AppEngine Lib.
```

- Version number of the group.

```
Step01.SQL:


UPDATE PS_RUN_CNTL_HR  SET VERSIONGBQDM =
%Bind(AE_GB_API_AET.VERSIONGBQDM) ⇒
 WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

> **Note**
>
> Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

   When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

Differences Between PeopleCode and Application Engine APIs

Question	Answer
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. • In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

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Developing Client-Specific Workflow

This topic provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build application. Workflow must be fully implemented by the client application developer. This topic discusses the main differences between the Group Build workflow and the standard way of implementing workflow.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client application to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the user directly to the calling-client application page.
- The business event is triggered from the client application page.

The worklist record table has to contain key fields for accessing the client application page, so map those fields to the appropriate client application page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client application page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client application key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client application developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.
2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client application page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and user ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be

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scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.

11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

1. Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client application page will be recorded.
    a. Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.
    b. Add a workflow flag, WF_FLAG.
2. Design MySpecificWorkflowDerived/Work.
    a. Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).
    b. Make the fields invisible.
3. Define a worklist record, MyWorklistRecord, for routing to the calling client application page.

    BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

    Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.
4. Define the Database Agent (DBAG) query.

    The DBAG query is responsible for calling the client application key field values: group ID, group version number, and user ID.
    a. In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:
    b. Go to PeopleSoft Query.
    c. Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and user ID.
    d. Include in your criteria prompts on group ID and version number.
    e. Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".
5. Design the MySpecificBusinessProcess.
    a. In PeopleSoft Application Designer, define a business process.

        MySpecificBusinessProcess has two activities:

        MySpecificWorkflowModule

        MySpecificWorkflowModuleResult

        Each activity has only one step branching to the client application page:
    b. In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.
    c. Define each item and its required attributes.

        The business event is triggered from the MySpecificWorkflowDerived/Work record.

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d. Add workflow PeopleCode, using the button Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.

e. On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).

f. On the Field Map page, specify the mapping between the worklist record fields and your client application page keys.

g. For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.

h. For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your application fields.

i. Define the Database Agent items:

   Define the target component on the Message Attributes page and provide the path to your client application component.

   In the Query Name field, enter the database agent query defined in Step 5.

   Define the mapping between the query selection fields (second column) and your client application page fields (last column).

6. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess

   a. Add a new process of type Database Agent on the Process Definitions page.

   b. On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:

      E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName

      kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -
      kbind2=:DERIVED_HR_GB.VERSIONGBQDM

      /A stands for Activity Name

      /MD stands for Message Definition

      -kbind1 and −kbind2 are bind variables from the API work page.

7. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

   Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

8. Add calls to Group Build API on your client application.

   On the FieldChange PeopleCode event of your Group Build calling button, use Group Build API as described at Step 7 in the first topics of this documentation. Don't forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.

9. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

Working with Group Versions

These topics provide an overview of version numbers and discuss how to work with versions (for developers).

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Understanding Version Numbers

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working with Versions (for Developers)

Before reading this topic, see "Building Applications or Batch Programs That Include Group Build Functions".

You can implement Group Build in an application by:

- Using the default developer query.

  The default developer query works with the default Group Result Table.
- Creating your own query.

  If you use your own query, you can define more parameters and/or more fields in a personal Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.
- The Group Results Table.

> **Note**
>
> You can bypass the versioning mechanism by calling GB_EXEC("Y"). Then the group is generated each time it is called.

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Note

When using Developer Query or User Query, keep in mind that GB_QRY_LINK_VIEW is based on the JOB record. When Group Build generates the SQL, the system replaces all references to GB_QRY_LINK_VIEW with JOB. If, after this is done, the left REC.FIELD is the same as the right REC.FIELD, Group Build will not process the line in the SQL generation.

For example, if you have the criteria GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT in Query, Group Build will replace it with JOB.EFFDT <= JOB.EFFDT. The system will then remove the line because the left REC.FIELD is the same as the right REC.FIELD. As a result, the Query count may differ from the one returned by Group Build.

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PeopleSoft HCM Application Diagnostic Plug-ins

Understanding Application Diagnostics

PeopleTools Diagnostic Framework provides an interface enabling you to run queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Centre.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the global support center analyst working with you.
- Support for rowset retrieval.

HCM has delivered a number of diagnostic plug-ins, which are application-specific queries, with this version. We will post any plug-ins we develop post-GA on My Oracle Support.

See *PeopleTools: Data Management*, "Running Diagnostics with Diagnostic Framework".

Delivered Application Diagnostic HCM Plug-Ins

These tables list the diagnostic plug-ins delivered by application.

Human Resources Manage Base Benefits

Manage Base Benefits delivers the one plug-in.

BA_EVENT_DIAGNOSTICS

The BA_EVENT_DIAGNOSTICS plug-in (Benefits Event Definition and Rules Setup Information):

- Uses the following additional parameters:
  - Event Rule ID
  - Effective Date
- Provides a diagnosis of the Benefit Event Setup and Coverage Code Rules associated with it.

  Data is extracted from the three primary tables: BAS_EVENT_RULE, BAS_EVENT_CLASS, and BAS_CVG_CD_RULE. Use this diagnostic to view the underlying data as it is defined in the database for the processing to be used by the Benefits Administration processing.

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Human Resources Manage Base Compensation and Budgeting

Manage Base Compensation and Budgeting delivers the one plug-in.

SP_DIAGNOSTICS_SALARY_STEP

The SP_DIAGNOSTICS_SALARY_STEP plug-in (Salary Step Details):

- Uses the following additional parameters:
  - SetID
  - Sal Admin Plan
  - Grade
  - Effective Date
- Provides a diagnosis of salary step details for a given plan.

ePerformance

ePerformance delivers two plug-ins:

- Document Templates

> **Note**
>
> This diagnostic script can also be used with Manage Employee Reviews.

- Debug/Trace Results

Document Templates

The Document Templates plug-in:

- Uses the following parameters:
  - Template ID
  - Effective Date
- Provides a diagnosis of the structure of the document template that created a particular document. This provides critical information to the support analyst for resolving an issue with a document. These tables, all keyed by template ID and effective date, are dumped:
  - Template Header (EP_TMPL_DEFN)
  - Process Participant Roles (EP_TMPL_PARTIC)
  - Document Sections (EP_TMPL_SECTION)
  - Role-Level Rules (EP_TMPL_ROLE)
  - Common Content: Items (EP_TMPL_ITEM)
  - Common Content: SubItems (EP_TMPL_SUBITEM)

Debug/Trace Results

The Debug/Trace Results plug-in:

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- Uses the following parameters:
  - Document ID
  - User Role
- Provides a diagnosis of the Debug/Trace results table view (EP_DBG_DIAG_VW) that is created by the built-in Debug/Trace facility. This information is keyed by document ID and user role.

  Additionally, a **Send to PeopleSoft** link on the Calculation Debug/Trace inquiry page enables the user to navigate to the Application Diagnostics launch page and send this data to PeopleSoft.

Global Payroll

Global Payroll provides the following plug-ins:

- GP_DIAG_000
- GP_DIAG_005
- GP_DIAG_010
- GP_DIAG_020
- GP_DIAG_030
- GP_DIAG_040
- GP_DIAG_100
- GP_DIAG_200

GP_DIAG_000

The GP_DIAG_000 plug-in (Return General Information):

- Uses the following parameters:
  - Operating System
  - 3–char ISO Country Code
- Provides a diagnosis of the following tables and information:
  - PSRELEASE: Release information.
  - PSOPTION: License information.
  - PS_INSTALLATION: HCM installation information.
  - PS_GP_PIN: Last element number.
  - PS_GP_INSTALLATION: Global Payroll installation information.
  - PS_MAINTENANCE_LOG: Bundles and fixes applied to the database.
  - PS_GP_COUNTRY: Country information.

> **Note**
>
> If COUNTRY parameter is empty, the system returns country information for the calendar group. If COUNTRY parameter is equal to *ALL*, the system returns all countries.

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GP_DIAG_005

The GP_DIAG_005 plug-in (Return Log File):

- Uses the full file path and file name to the location of file as a parameters.
- Provides a diagnosis of the file specified in the **"Full Path + the log file name"** field.

GP_DIAG_010

The GP_DIAG_010 plug-in (Return SQL Stored Statement):

- Uses the COBOL Program Name as a parameter.
- Provides a diagnosis of PSSQLSTMT_TBL, which returns all SQL statements used for the COBOL name specified in the **COBOL Program Name** field.

GP_DIAG_020

The GP_DIAG_020 plug-in (Return AE Program Definition):

- Uses the Application Engine Name as a parameter.
- Provides a diagnosis of the following Application Engine information:
  - PSAEAPPLDEFN
  - PSAEAPPLSTATE
  - PSAESECTDTLDEFN
  - PSAESTEPDEFN
  - PSAESTEPMSGDEFN
  - PSAESTMTDEFN
  - PSSQLTEXTDEFN

GP_DIAG_030

The GP_DIAG_030 plug-in (Return Element Definition):

- Uses Element Name 1 - 5 as a parameter.
- Provides a diagnosis of the following tables, based on the element type returned, for each of up to five element definitions:
  - Element name information: PS_GP_PIN
  - Take Element: GP_ABS_TAKE, GP_ABS_TAKE_CFG, GP_ABS_TAKE_DAY, GP_ABS_TAKE_ELM, GP_ABS_TK_FCST
  - Accumulator Element: GP_ACCUMULATOR, GP_ACM_MBR
  - Array Element: GP_ARRAY, GP_ARRAY_FLD, GP_ARRAY_KEY, GP_ARRAY_PRC
  - Bracket Element: GP_BRACKET
  - Count Element: GP_COUNT
  - Date Element: GP_DATE
  - Duration Element: GP_DURATION, GP_DUR_GNRN
  - Earning - Deduction Element: GP_ERN_DED, GP_ELM_DFN_SOVR, GP_PIN_CMPNT, GP_RCP_DED

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  - Element Group Name: GP_ELEM_GRP, GP_ELEM_GRP_MBR
  - Fictitious Calculation Element: GP_FC_IN, GP_FC_OUT, GP_FC_OUT_DTL, GP_FC_SEG, GP_FC_TBL
  - Formula Element: GP_FORMULA, GP_FORMULA_CLUE, GP_FORMULA_DTL, GP_FORMULA_VAR
  - Generation Control Element: GP_GCTL, GP_GCTL_DTL
  - Historical Rule Element: GP_HIST_ELEM, GP_HIST_RULE
  - Process Element: GP_PROCESS, GP_PROCESS_DTL
  - Proration Element: GP_PRORATION
  - Rate Code Element: GP_RATE_CODE
  - Section Element: GP_SECTION, GP_SECTION_DTL
  - System Element: GP_SYSTEM_PIN
  - Variable Element: GP_VARIABLE
  - Write Array Element: GP_WA_ARRAY, GP_WA_FLD

GP_DIAG_040

The GP_DIAG_040 plug-in (Return Array/WA Audit):

- Uses the 3 char ISO Country Code as a parameter.
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_ARRAY_D: All arrays of a country not synchronized with the record definition.
  - PS_GP_DIAG_WA_D: All write arrays of a country not synchronized with the record definition.

GP_DIAG_100

The GP_DIAG_100 plug-in (Return Organizations Setup Data):

- Uses the Calendar Group ID parameter.
- Provides a diagnosis of the following tables and information:
  - PS_GP_PYENT: Pay entity information.
  - PS_GP_PYENT_DTL: Pay entity detail information.
  - PS_GP_CAL_RUN: Calendar group information.
  - PS_GP_CAL_RUN_DTL: Calendar group detail information.
  - PS_GP_CALENDAR: Calendar information.
  - PS_GP_RUN_TYPE: Run type information.

GP_DIAG_200

The GP_DIAG_200 plug-in (Return Employee Information):

- Uses the following parameters:
  - EmplID
  - Employee Record Number

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  - Calendar Group ID
  - Calendar ID
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_JOB_D: Payroll information (but no compensation data).
  - PS_GP_DIAG_EMPL_D: Dates.
  - PS_GP_DIAG_CTR1_D: Contract information.
  - PS_WKFCNT_TYPE: Related contract information.
  - PS_GP_DIAG_CTR2_D: Related contract information.
  - PS_GP_PAYEE_DATA: Payee information.
  - PS_GP_DIAG_PI_D: Positive input (but no amount data).
  - PS_GP_NET_DIST_DTL: Banking and payment information.
  - PS_GP_RTO_TRGR: Trigger information.
  - PS_GP_SEG_TRGR: Related trigger information.
  - PS_GP_DIAG_P_SEG_D: Payroll result headers (but no gross and net data).
  - PS_GP_DIAG_MSG_D: Payroll error messages.

Time and Labor

Time and Labor provides the following plug-ins:

- TL_DIAGNOSTICS_TA_EMPL_PAY
- TL_DIAGNOSTICS_TA_EMPL_GRP
- TL_DIAGNOSTICS_TA_TACODE
- TL_DIAGNOSTICS_TA_RPTD_TIME
- TL_DIAGNOSTICS_PT_INV_PAYTIME
- TL_DIAGNOSTICS_PT_DUP_SEQ
- TL_DIAGNOSTICS_PT_INV_OFFSET
- TL_DIAGNOSTICS_SETUP_TIMEPRD
- TL_DIAGNOSTICS_SETUP_TIMEZONE
- TL_DIAGNOSTICS_SETUP_RULEPGM
- TL_DIAGNOSTICS_SETUP_ EXWRKGRP
- TL_DIAGNOSTICS_SETUP_TCD

TL_DIAGNOSTICS_TA_EMPL_PAY

Payable time for employees are displayed for the given date range. The exceptions created (if any) for that date range are also displayed.

The TL_DIAGNOSTICS_TA_EMPL_PAY plug-in:

- Uses the following parameters:
  - EmplID
  - Employee Record

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  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_PT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TRC, A.TL_QUANTITY, A.PAYABLE_STATUS FROM PS_TL_PAYABLE_TIME A
  - SQL for the View: TL_DU_TA_EX_VW

    SELECT A.EXCEPTION_ID, A.EMPLID, A.EMPL_RCD, A.DUR, A.EXCEPTION_SOURCE, A.MSG_DATA1 FROM PS_TL_EXCEPTION A
  - Create SQL:

    SELECT %DateOut(EARLIEST_CHGDT), TA_STATUS FROM PS_TL_TR_STATUS WHERE EMPLID= :1 AND EMPL_RCD = :2

TL_DIAGNOSTICS_TA_EMPL_GRP

If the Run Control ID has a dynamic group included, the list of employees in the group is resolved. These employees are checked if they are Active between the Process Through Date and Process Through Date – 31 days.

The TL_DIAGNOSTICS_TA_EMPL_GRP plug-in:

- Uses the Run Control ID as a parameter.
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_GRP_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.EFFDT, A.EMPL_STATUS FROM PS_JOB A
  - SQLExec:

    SELECT %DATEOUT(A.THRUDATE) FROM PS_TL_TA_RUNCTL A WHERE A.RUN_CNTL_ID=:1 AND A.OPRID=:2
  - CreateSQL:

    SELECT DISTINCT A.EMPLID, A.EMPL_RCD FROM PS_JOB A WHERE (EXISTS (SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID='Z' AND B.INCLUD_EXCLUDE_IND='+' AND A.EMPLID=B.EMPLID AND A.EMPL_RCD=B.EMPL_RCD) OR EXISTS(SELECT 'X' FROM PS_TL_GROUP_DTL B1 WHERE B1.GROUP_ID IN (SELECT B.GROUP_ID FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID <> 'Z') AND A.EMPLID=B1.EMPLID AND A.EMPL_RCD=B1.EMPL_RCD)) AND NOT EXISTS(SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B2 WHERE B2.RUN_CNTL_ID=:1 AND B2.GROUP_ID='Z' AND B2.INCLUD_EXCLUDE_IND='-' AND A.EMPLID=B2.EMPLID AND A.EMPL_RCD=B2.EMPL_RCD) AND EMPL_STATUS='A' AND (A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J1 WHERE A.EMPLID=J1.EMPLID AND A.EMPL_RCD= J1.EMPL_RCD AND J1.EFFDT <=%DATEIN(:2)) OR A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J2 WHERE A.EMPLID=J2.EMPLID AND A.EMPL_RCD=J2.EMPL_RCD AND J2.EFFDT >%DATEIN(:2) AND J2.EFFDT <=%DATEIN(:3) AND J2.EMPL_STATUS='A'))

TL_DIAGNOSTICS_TA_TACODE

The TL_DIAGNOSTICS_TA_TACODE plug-in (listing of SQL Object IDs and SQL statements used in the time administration process):

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- Uses the SQL Object ID as parameter.
- Provides a diagnosis of the SQL for the View: TL_DU_TA_SQL_VW.

  SELECT A.SQLID, A.SQLTEXT FROM PSSQLTEXTDEFN A

TL_DIAGNOSTICS_TA_RPTD_TIME

This lists the reported time details of an employee in a give date range based on the reported status (input parameter). If the EmplID is not given as input this lists all the employees with the specific reported status in the given date range.

The TL_DIAGNOSTICS_TA_RPTD_TIME plug-in:

- Uses the following parameters:
  - EmplID
  - Reported Time Status
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_RPT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_VW B WHERE B.FIELDNAME = 'REPORTED_STATUS' AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQL for the View: TL_DU_TA_RPL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_LNG B WHERE B.FIELDNAME = 'REPORTED_STATUS' AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME='REPORTED_STATUS' AND %Upper(A.XLATLONGNAME) = :1
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME='REPORTED_STATUS' AND %Upper(A.XLATLONGNAME) = :1
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME='REPORTED_STATUS'
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME='REPORTED_STATUS'

TL_DIAGNOSTICS_PT_INV_PAYTIME

The TL_DIAGNOSTICS_PT_INV_PAYTIME plug-in (lists payable time where payable status is rejected by payroll for a date range):

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- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_PT_PT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY, B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A, XLATTABLE_VW B WHERE ((A.PAYABLE_STATUS ='RP' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='CL' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='TP' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='SP' AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME='PAYABLE_STATUS' AND B. FIELDVALUE = A.PAYABLE_STATUS
  - SQL for the View: TL_DU_PT_PTL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY, B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A, XLATTABLE_LNG B WHERE ((A.PAYABLE_STATUS ='RP' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='CL' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='TP' AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS ='SP' AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME = 'PAYABLE_STATUS' AND B. FIELDVALUE = A.PAYABLE_STATUS

TL_DIAGNOSTICS_PT_DUP_SEQ

The TL_DIAGNOSTICS_PT_DUP_SEQ plug-in (lists duplicate sequence numbers for the offsets) provides a diagnosis of SQL for the View: TL_DU_PT_SEQ_VW:

SELECT A.SEQ_NBR, COUNT(*) FROM PS_TL_PAYABLE_TIME A GROUP BY A.SEQ_NBR HAVING COUNT(*) > 1

TL_DIAGNOSTICS_PT_INV_OFFSET

The TL_DIAGNOSTICS_PT_INV_OFFSET plug-in (lists the Payable time offsets rejected by Payroll) provides a diagnosis of SQL for the View: TL_DU_PT_OFF_VW:

SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.SEQ_NBR, A.TL_QUANTITY, A.PAYABLE_STATUS, A.RECORD_ONLY_ADJ, A.ORIG_SEQ_NBR FROM PS_TL_PAYABLE_TIME A WHERE EXISTS (SELECT 'X' FROM PS_TL_PAYABLE_TIME C WHERE A.EMPLID =C.EMPLID AND A.EMPL_RCD =C.EMPL_RCD AND A.DUR=C.DUR AND A.ORIG_SEQ_NBR=C.SEQ_NBR AND C.ORIG_SEQ_NBR <> 0 AND C.RECORD_ONLY_ADJ = 'N' AND C.PAYABLE_STATUS NOT IN ('ES','NA') AND C.TL_QUANTITY > 0 AND NOT EXISTS (SELECT 'X' FROM PS_TL_PAYABLE_TIME A2 WHERE A2.EMPLID =C.EMPLID AND A2.EMPL_RCD =C.EMPL_RCD AND A2.DUR=C.DUR AND A2.ORIG_SEQ_NBR=C.SEQ_NBR AND A2.TL_QUANTITY < 0)) OR EXISTS (SELECT 'X' FROM PS_TL_PAYABLE_TIME C1 WHERE A.EMPLID =C1.EMPLID AND A.EMPL_RCD =C1.EMPL_RCD AND A.DUR=C1.DUR AND A.ORIG_SEQ_NBR=C1.SEQ_NBR AND C1.ORIG_SEQ_NBR =0 AND C1.RECORD_ONLY_ADJ = 'N' AND C1.PAYABLE_STATUS NOT IN ('ES','NA') AND EXISTS (SELECT 'X' FROM PS_TL_PAYABLE_TIME A1 WHERE A1.EMPLID=C1.EMPLID AND A1.EMPL_RCD =C1.EMPL_RCD AND A1.DUR=C1.DUR AND A1.TL_QUANTITY < 0 AND A1.ORIG_SEQ_NBR=C1.SEQ_NBR))

TL_DIAGNOSTICS_SETUP_TIMEPRD

The plug-in displays the Period IDs that are not built over the given date range, along with the workgroup from PS_TL_WRKGRP_TBL.

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The TL_DIAGNOSTICS_SETUP_TIMEPRD plug-in:

- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of SQL for the View: TL_DU_ST_TP_VW:

  SELECT PERIOD_ID, WORKGROUP FROM PS_TL_WRKGRP_TBLCreateSQL:SELECT DISTINCT A.PERIOD_ID FROM PS_TL_TIME_PERIODS A WHERE A.PERIOD_ID NOT IN (SELECT DISTINCT B.PERIOD_ID FROM PS_TL_CALENDAR B WHERE ((%DateIn(:1)>B.START_DT AND %DateIn(:2)<B.END_DT) OR (%DateIn(:1)<B.END_DT AND %DateIn(:2) >B.START_DT)))

TL_DIAGNOSTICS_SETUP_TIMEZONE

The Plug-in obtains the time zone of the employee using the input EmplID and displays the time zone offsets within the given date range.

The TL_DIAGNOSTICS_SETUP_TIMEZONE plug-in:

- Uses the following parameters:
  - EmplID
  - Start Date
  - End Date
- Provides a diagnosis of SQLExec:

  SELECT B.TIMEZONE FROM PS_TL_EMPL_DATA B WHERE B.EMPLID= :1 AND B.EFFDT=(SELECT MAX(EFFDT) FROM PS_TL_EMPL_DATA A WHERE A.EMPLID=:1 AND A.EFFDT<=%DateIn(:2) AND A.TIME_RPTG_STATUS='A')

TL_DIAGNOSTICS_SETUP_RULEPGM

The plug-in is used to display the list of workgroups that do not have Rule Programs associated to them.

The TL_DIAGNOSTICS_SETUP_RULEPGM plug-in provides a diagnosis of SQL for the View: TL_DU_ST_RUL_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.RULE_PGM_ID = ' '

TL_DIAGNOSTICS_SETUP_ EXWRKGRP

The plug-in displays the list of all exception time reporter type workgroups with missing Schedule ID. Workgroups of exception time reporter type are displayed if a Schedule ID is not attached to them.

The TL_DIAGNOSTICS_SETUP_ EXWRKGRP plug-in provides a diagnosis of SQL for the View: TL_DU_ST_SCH_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.TIME_RPTG_TYPE = 'E' AND A.SCHEDULE_ID=' '

TL_DIAGNOSTICS_SETUP_TCD

The plug-in verifies the TCD setup data. For the given TCD ID input, the plug-in traces the TCD (message node name), message name, message status, transaction status and type of

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transaction. It also verifies checks for the Integration type. Displays whether the Inbound, outbound directories are specified for Flat file type of integration.

The TL_DIAGNOSTICS_SETUP_TCD plug-in:

- Uses the TCD ID as a parameter.
- Provides a diagnosis of:
  - SQL for the View: TL_DU_ST_TCD_VW

    SELECT A.RQSTMSGNAME, A.MSGNODENAME, B.MSGSTATUS, C.XLATSHORTNAME, A.EFF_STATUS FROM PSNODETRX A, PSMSGDEFN B, XLATTABLE_VW C WHERE A.RQSTMSGNAME=B.MSGNAME AND C.FIELDNAME='TRXTYPE' AND C.FIELDVALUE=A.TRXTYPE
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_VW A WHERE A.FIELDNAME = 'INTEGRATION_TYPE' AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID=:1 AND B.EFFDT = (SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_LNG A WHERE A.FIELDNAME = 'INTEGRATION_TYPE' AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID =:1 AND B.EFFDT=(SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))CreateSQL:SELECT FILE_OUTPUT_DIR, FILE_ARCHIVE_DIR FROM PS_TL_INSTALLATION

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Delivered Workflows for PeopleSoft HCM

General Workflow Information

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

> **Note**
>
> While several workflow business processes are delivered with your HCM system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

> **Note**
>
> You must set up workflow for PeopleSoft self service applications using pages on the **Set Up HCM**, and then **Common Definitions**, and then **Self Service menu**.

See Using Workflow with Self-Service Transactions.

> **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 Enterprise Components: Understanding Notification Composer.

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Creating Role Users Using a Message Agent

PeopleSoft HCM includes a message agent that enters all of people with an active job record as role users automatically.

While you could manually assign each employee to a role on the User Profile component, this process is tedious if you're designating many employees as users. Some workflow processes could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

Functionality	Query
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Delivered Workflows for Administer Training

This topic discusses PeopleSoft Human Resources Administer Training workflows. The workflows are listed alphabetically by workflow name.

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Approve Training Request Event

This topic discusses the approve training request event workflow.

Description

Information Type	Description
Event Description	Upon enrolling a student for a course, a worklist item is sent to HR Technical/ Administrator notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	HR Technical/Admin
Email Template	Approve Training WL
Business Process	Approve Training Request
Business Activity	APPROVE_TRAINING_REQ_USF
Business Event	Approve Training Request Event

Authorize Training Event

This topic discusses the authorize training event workflow.

Description

Information Type	Description
Event Description	Upon enrolling a student for a course, a worklist item is sent to Training Administrator for authorization.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Training Administrator
Email Template	Authorize Training Request WL
Business Process	Authorize Training Request
Business Activity	AUTHORIZE_TRAINING_REQ_USF

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Information Type	Description
Business Event	Authorize Training Event

Request Training Event (CSE)

This topic discusses the request training event (cse) workflow.

Description

Information Type	Description
Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	COURSE_ENROLLMENT1
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (CSE)
Business Process	Course Session Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (CSE)

Request Training Event (SCE)

This topic discusses the request training event (sce) workflow.

Description

Information Type	Description
Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	CRSE_ENRL_WL
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt

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Information Type	Description
Email Template	Request Training WL (SCE)
Business Process	Student Course Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (SCE)

Request Training Event (ST)

This topic discusses the request training event (st) workflow.

Description

Information Type	Description
Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (ST)
Business Process	Student Training
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (ST)

Send Confirmation

This topic discusses the send confirmation workflow.

Description

Information Type	Description
Event Description	Upon a student being enrolled in a class, the student will receive an email with the details of the course in which he/she is enrolled.
Notification Method	Email

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Workflow Objects

Information Type	Description
Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Confirmation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Confirmation

Send Cancellation

This topic discusses the send cancellation workflow.

Description

Information Type	Description
Event Description	When a course has been cancelled, the enrolled students will receive email with the details of the course in which he/she is enrolled and that has been cancelled.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Cancellation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Cancellation

Send Rescheduling

This topic discusses the send rescheduling workflow.

Description

Information Type	Description
Event Description	When a course has been rescheduled, the enrolled students will receive email with the new schedule of the course in which he/she is enrolled.

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Information Type	Description
Notification Method	Email

Workflow Objects

Information Type	Description
Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Rescheduling
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Rescheduling

Delivered Workflows for Administer Workforce

This topic discusses Administer Workforce workflows. The workflows are listed alphabetically by workflow name.

(USF) 60 Day Review

This topic discusses the 60 Day Review workflow.

Description

Information Type	Description
Action Description	Upon the '60 Day Tenure Notices' process being run to identify Tenure Conversions, a worklist item is sent to the supervisor(s) of all employees who will reach their Tenure Conversion dates within the next 60 days. Upon the '60 Day Probation Term Notices' process being run to identify Probation Terms, a worklist item is sent to the supervisor(s) of all employees who will reach their Probation Termination dates within the next 60 days. Upon the '60 Day WGI Notices' process being run to identify WGI's (Within Grade Increases), a worklist item is sent to supervisor(s) of all employee for whom WGI's are due within the next 60 days.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	GVT_60_DAY_REV

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Information Type	Description
Workflow Action	Manual
Role	Supervisor-Part Posn Mgt
Email Template	Ten Conv WL Notice PT WL Notice WGI WL
Business Process	60 Day Notice Select
Business Activity	ROUTE_TO_WORKLIST
Business Event	Notice Ten Conv Event Notice Prob Term Event Notice WGI Event

(USF) Generic

This topic discusses the Generic workflow.

Description

Information Type	Description
Event Description	This is a common email and workflow event for administrator self-service notifications.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	EE_HR_PROC
Workflow Action	Manual
Role	Roleuser By EMPLID
Email Template	Email Notification FE_HR_ADMIN_WL
Business Process	FE_NOTIFY_HR_ADMIN
Business Activity	FE_NOTIFY_HR_ADMIN
Business Event	Email Notification Notify HR Admin

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Hire Employees

This topic discusses the Hire Employee workflow.

Description

Information Type	Description
Event Description	The business event, Hire Employee, is triggered whenever a new employee is hired. The entire Hire Employee business process takes place within this one event. The system utilizes workflow to send notification about the new hire to various roles within the organization required to take action. Upon hiring an employee in France, the system also routes email/worklist items to the Personal Administrator for various events.

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Information Type	Description
Action Description	Benefits Administrator - The system directs an email to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs an email to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. (USF) MIS Administrator - Sends an email to the MIS Administrator to let him/her know about the new hire. Login ID's and/or PC equipment can be set up appropriately. Payroll Administrator - The system directs an email to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs an email to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. Variable Compensation Administrator - The system routes an email to the Variable Compensation Administrator to let him/her know about the new hire and determine if this new hire can be included into a compensation plan. Benefits Administrator - The system directs a worklist item to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs a worklist item to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. Payroll Administrator - The system directs a worklist item to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs a worklist item to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. An email is sent to the Personal Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date.

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Information Type	Description
Action Description (continued)	An email is sent to the HR Administrator (FRA) when an employee is hired into the system with a start date in the future. This reminder warns them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) when an employee is hired into the system and additional information regarding the employee is needed.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	JOB_DATA_EMP EE_HIRE
Workflow Action	Automatic
Role	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator Variable Compensation Administrator HR Administrator FRA Worklist Administrator
Email Template	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator VC_HIRE_EMAIL Single Hiring Statement SHS_EMAIL_DELAY Complete Employee Info
Business Process	Administer Workforce Recruit Employees ADMINISTER_WORKFORCE_USF REPORT_REGULATIONS
Business Activity	Hire Workforce Hire Workforce (USF) HIRE_WORKFORCE_FRA

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Information Type	Description
Business Event	Hire Employee VC_HIRE_EVENT SHS_HIRE_EVENT SHS_HIRE_DELAY SHS_HIRE_INFO

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Maintain Job Data

This topic discusses the Maintain Job Data workflow.

Description

Information Type	Description
Action Description	Upon a change to an employee's service date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a job action change has been performed on an employee with multiple jobs, a worklist item is sent to the Benefits Administrator notifying them to review the Primary Job indicators and Flags. An email is sent to notify the Variable Compensation Administrator to review the changes and take appropriate action if necessary. Upon a change to an employee's Benefits System, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a change is made to an employee's Job record, if the action added or changed matches the Stock Action list (defined in Stock Action Reasons), then a worklist item is sent to the Stock Administrator to take appropriate action. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the Works Council for review. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email is sent to notify the employee. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the new manager informing them of the decision. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the current manager informing them of the decision. Works Council Specific - When the HR Administrator requests a job change for an employee, the request is routed by way of email and worklist item to the Works council for review and approval.
Notification Method	Email, Worklist

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Workflow Objects

Information Type	Description
Event	JOB_DATA WC_JOB_CHG_REQ_HR EE_HR_PROC
Workflow Action	Automatic
Role	Benefits Administrator VC Administrator Stock Administrator Roleuser By EMPLID Works Council Representative
Email Template	Benefits Administrator Benefits Administrator1 Benefits Administrator2 Benefits Administrator3 Variable Comp Administrator Stock Admin Works Council Employee New Manager Current Manager Works Council
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF WORKS_COUNCIL_NOTIFICATION ADMINISTER_STOCK
Business Activity	Maintain Job Data Maintain Job Data (USF) WC_HR_DECISION WC_RJC_HR STOCK_ACTION
Business Event	Change in Service Date MultiJob Change Job Change Primary Jobs Audit Change in Benefits System Stock_Action_List Notify WC Notify EE Notify New Manager Notify Current Manager

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Maintain Personal Data

This topic discusses the Maintain Personal Data workflow.

Description

Information Type	Description
Action Description	Upon a change to an employee's birth date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. (CAN) Upon a change to an employee's Province of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur. Upon a change to an employee's state of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	PERSONAL_DATA EE_HR_PROC
Workflow Action	Automatic
Role	Benefits Administrator Payroll Administrator
Email Template	Benefits Administrator Payroll Administrator Payroll Administrator1
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF
Business Activity	Maintain Personal Data Maintain Personal Data (USF)
Business Event	Change in Birth Date Change Province in Canada Change State in U.S.

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(USF) PAR Processing

This topic discusses the PAR Processing workflow.

Description

Information Type	Description
Action Description	Upon the First Authorizer approving a PAR, a worklist item is sent to the Second Authorizer for review/approval as the next step in the process. When a request is routed to the First Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the First Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon the Second Authorizer approving a PAR, a worklist item is sent to the final approver in the process for Approval and Signature. When a request is routed to the Second Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the Second Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a request is routed to HR for final approval and signature, a worklist item is sent to the HR Administrator notifying them of the transaction to be processed. When a request is disapproved or returned by the final approver, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is disapproved or returned by the final approver, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon an employee submitting a PAR request, a worklist item is sent to the employee's manager for first level approval. When a request is routed to HR for approval and final processing and is disapproved or returned, a worklist item is sent to the employee's manager with requested

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Information Type	Description
	information or notifying them of the disapproved request. When a request is routed to HR for approval and final processing and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a manager-submitted request is disapproved, a worklist item is sent to the employee's manager notifying them of the disapproval. When a manager-submitted request is disapproved, an email is sent to the employee notifying them of the disapproval. When an employee's manager submits a PAR request for an employee, a worklist item is sent to the first level approver (First Authorizer) for review and approval.
Action Description (continued)	Once the Retro WGI request has passed the authorization and approval processes, it goes directly to the Human Resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Retro WGI for that employee. Once the Manual WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Manual WGI for that employee. Once the Probation Termination request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once the Tenure Conversion request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once a WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the WGI for that employee.
Notification Method	Email, Worklist

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Workflow Objects

Information Type	Description
Event	EE_1ST_AUTH EE_2ND_AUTH EE_APPROVAL EE_EMPL_REQ EE_HR_PROC EE_SUP_REQ GVT_COMP_ACTN
Workflow Action	Automatic
Role	PAR Authorizer Supervisor-Part Posn Mgt Roleuser by EmplID Personnel Administrator PAR Supervisor
Email Template	2nd Authorizers Worklist Supervisor Worklist EMail Employee Approval Signature Worklist HR Worklist 1st Authorizers Worklist Retro WGI WL Manual WGI WL Except TC WL PT Comp WL TC Comp WL WGI Comp WL
Business Process	Perform 1st Authorization 1st Auth Disapprove/Return Perform 2nd Authorization 2nd Auth Disapprove/Return Perform Approval/Signature Approver Disapproval/Return Enter Employee Request HR Process Disapprove/Return Supervisor Disapproval/Return Enter Supervisor Request Processed Action
Business Activity	1st Authorization Disapprove/Return 2nd Authorization Approval/Signature Employee Request Supervisor Request PERFORM_AUTO_ACTION

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Information Type	Description
Business Event	Route to 2nd Authorization Route Disapproval/Return Route for Approval Signature Route to HR Route Request to Supervisor Route for 1st Authorization Retro WGI Event Manual WGI Event Except TC Review Notice PT Complete Notice TC Complete Notice WGI Complete

Terminate Employee

This topic discusses the Terminate Employee workflow.

Description

Information Type	Description
Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.

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Information Type	Description
Action Description	This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends a worklist item to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward. This event sends a worklist item to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward.
Notification Method	Email, Worklist

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Workflow Objects

Information Type	Description
Event	JOB_DATA
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Roleuser by EmplID Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Profit Sharing to be reviewed Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Administer Workforce
Business Activity	Terminate Workforce
Business Event	Notification Crse Enrollment Cancellation Profit Sharing Benefit Cancellation Payroll Termination Company Property Retrieval

Terminate Workforce

This topic discusses the Terminate Workforce workflow.

Description

Information Type	Description
Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.

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Information Type	Description
Action Description	This event sends an email to the MIS Administrator notifying them that the employee has been terminated so appropriate action can be taken to disable system accounts. This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving. This event sends a worklist item to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	EE_HR_PROC
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator

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Information Type	Description
Email Template	MIS Administrator Supervisor Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Terminate Employee
Business Activity	Update Emp Payroll Data (USF)
Business Event	Notification Crse Enrollment Cancellation Benefit Cancellation Payroll Termination Company Property Retrieval

(USF) Terminate Workforce

This topic discusses the (USF) Terminate Workforce workflow.

Description

Information Type	Description
Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.

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Information Type	Description
Action Description	This event sends an email to the MIS Administrator notifying them that the employee has been terminated so appropriate action can be taken to disable system accounts. This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving. This event sends a worklist item to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving.
Notification Method	Email, Worklist

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Workflow Objects

Information Type	Description
Event	EE_HR_PROC
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Terminate Employee
Business Activity	Update Emp Payroll Data (USF)
Business Event	Notification Crse Enrollment Cancellation Benefit Cancellation Payroll Termination Company Property Retrieval

Delivered Workflows for Manage Base Compensation and Budgeting

This topic discusses PeopleSoft Human Resources Manage Base Compensation and Budgeting workflows. The workflows are listed alphabetically by workflow name.

Approve or Deny Ad Hoc Salary Changes

This topic discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Description

This topic discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Information Type	Description
Event Description	An administrator or manager approves or rejects an ad hoc salary change request.
Action Description	Employees receive an email when the administrator approves or rejects the ad hoc salary change request.
Notification Method	Email, Worklist

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Workflow Objects

Information Type	Description
Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Approve or Deny Budgeted Salary Changes

This topic discusses the Approve or Deny Budgeted Salary Changes workflow.

Description

Information Type	Description
Event Description	An administrator or manager approves or rejects a budgeted salary request for a group of employees.
Action Description	Manager receives an email when the administrator or approving manager approves or rejects the budgeted salary request for a group of employees.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Process Salary Change

This topic discusses the Process Salary Change workflow.

Description

Information Type	Description
Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Process Salary Change

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Information Type	Description
Workflow Action	Process Salary Change
Role	Personnel Administrator

Request Salary Change

This topic discusses the Calculate Budgets workflow.

Description

Information Type	Description
Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates changes to group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Request Salary Change
Workflow Action	Request Salary Change
Role	Roleuser by Roleuser Query

Delivered Workflow for Manage Employee Reviews

This topic discusses Employee Review workflows.

Manage Employee Reviews Notification Events

This topic discusses the Employee Review notification workflow.

Description

Information Type	Description
Event Description	When employees and managers use Employee Reviews to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant.
Action Description	Email notifications are sent to inform the appropriate persons of: the availability of documents for viewing and updating; a change in the status of documents; and the transfer of documents to a new manager.
Notification Method	email

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Delivered Workflows for Manage French Profit Sharing

This topic discusses PeopleSoft Human Resources Manage French Profit Sharing workflows. The workflows are listed alphabetically by workflow name.

Approve Fund Release Request

This topic discusses the Approve Fund Release Request workflow.

Description

Information Type	Description
Event Description	Workflow is generated when an administrator approves an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request is approved.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	APP_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	APP_REL_REQ_EVENT

Error in Fund

This topic discusses the Error in Fund workflow.

Description

Information Type	Description
Event Description	When the Process Interest and Payment process encounters an error an employee's fund, an email is sent to the administrator to notify them to review.
Action Description	The email notifies the administrator of an error in an employee's fund.
Notification Method	Email

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Workflow Objects

Information Type	Description
Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	HR Administrator FRA
Email Template	FUN_STA_ERR_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_ERR_EVENT

Modify Financial Organization

This topic discusses the Modify Financial Organization workflow.

Description

Information Type	Description
Event Description	When employees change the financial organization on the Investment page of the Agreement Personalization component (WP_AGREEMENT_CUST), workflow is generated to notify the administrator of the change.
Action Description	Worklist and an email notify the administrator of the change in financial organization.
Notification Method	Email, worklist.

Workflow Objects

Information Type	Description
Event	WP_AGREEMENT_CUST
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	MOD_FIN_ORG_MAIL
Business Process	MOD_FIN_ORG_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	MOD_FIN_ORG_EVENT

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Modify Fund Status

This topic discusses the Modify Fund Status workflow.

Description

Information Type	Description
Event Description	When the fund status for a fund is modified by the Process Interest and Payment process, an email is sent to inform the member of the change.
Action Description	The email notifies employees of the change of fund status.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	Employee
Email Template	FUN_STA_MOD_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_MOD_EVENT

Reject Fund Release Request

This topic discusses the Reject Fund Release Request workflow.

Description

Information Type	Description
Event Description	Workflow is generated when an administrator rejects an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request was rejected.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee

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Information Type	Description
Email Template	REJ_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REJ_REL_REQ_EVENT

Request Fund Release

This topic discusses the Request Fund Release workflow.

Description

Information Type	Description
Event Description	Employee submits a request for release of profit-sharing funds from the Personal Entitlements component (WP_FUND_RELEASE). Workflow is generated to notify the administrator of the request.
Action Description	From the email or worklist, the system transfers the administrator to the Employee Release Detail page where he or she can view and approve or reject the fund release request.
Notification Method	Email, worklist.

Workflow Objects

Information Type	Description
Event	WP_FUND_RELEASE
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	REQ_FUN_REL_MAIL
Business Process	REQ_FUN_REL_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REQ_FUN_REL_EVENT

Delivered Workflows for Manage French Public Sector

This topic discusses PeopleSoft Human Resources Manage French Public Sector workflows. The workflows are grouped by activity.

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CAE Request (Hiring)

This topic discusses the CAE Request workflow in the Hiring Activity.

Description

Information Type	Description
Event Description	When a hiring is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	HIRE
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE
Business Event	FP_CA_REQUIRE_E

Stamp Request (Hiring)

This topic discusses the Stamp Request workflow in the CAE Allocation (hire process) activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator

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Information Type	Description
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_STMPREQ_E

CAE Denied (Hiring)

This topic discusses the CAE Denied workflow in the CAE Allocation (hire process) Activity.

Description

Information Type	Description
Event Description	If the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the hiring.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_DENY_E

Stamp Denied (Hiring)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (hiring) Activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE.
Notification Method	Worklist

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Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPDENY_E

Stamp Granted (Hiring)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (hiring) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the hiring.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPGRANTED_E

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Stamp Postponed (Hiring)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (hiring) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email to the manager.
Action Description	The email informs the manager that the hiring is postponed
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STBY_E

Delete Confirmed (Hiring)

This topic discusses the Delete Confirmed workflow in the CAE Delete (hiring denied) activity.

Description

Information Type	Description
Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the hiring.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL

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Information Type	Description
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE_REFUSE
Business Event	FP_CA_DELETE_E

Grade Change

This topic discusses the Grade Change workflow in the Grade Change activity.

Description

Information Type	Description
Event Description	When a grade change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CHGT_RANK
Business Event	FP_CA_RKCHNG_C

Stamp Request (Grade and CAE Change)

This topic discusses the Stamp Request workflow in the Grade and CAE Change activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

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Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_STMPREQ_C

CAE Denied (Grade and CAE Change)

This topic discusses the CAE Denied workflow in the Grade and CAE Change activity.

Description

Information Type	Description
Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_DENY_C

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Stamp Denied (New Grade)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (new grade) activity.

Description

Information Type	Description
Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPDENY_C

Stamp Granted (New Grade)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (new grade) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual

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Information Type	Description
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPGRANTED_C

Stamp Postponed (New Grade)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (new grade) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE for the grade change, this workflow generates an email.
Action Description	An email informs the manager that the grade change process is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STBY_C

Delete Confirmed (New Grade)

This topic discusses the Delete Confirmed workflow in the CAE Delete (new grade) activity.

Description

Information Type	Description
Event Description	When the headcount manager deletes the CAE request for grade change, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade change.

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Information Type	Description
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_RK_CHNG_DENIED
Business Event	FP_CA_DELETE_C

Work Time Percentage Change

This topic discusses the Work Time Percentage Change workflow in the Work Time Percentage Change activity.

Description

Information Type	Description
Event Description	When a Work Time Percentage (WTP) Change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for WTP.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CHGT_TPS_WORK
Business Event	FP_CA_WKRT_F

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Stamp Request (WTP and CAE Change)

This topic discusses the Stamp Request workflow in the Work Time Percentage and CAE Change activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE for WTP, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_STMPREQ_F

CAE Denied (WTP and CAE Change)

This topic discusses the CAE Denied workflow in the Work Time Percentage and CAE Change activity.

Description

Information Type	Description
Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers the control to the manager who deletes the Work Time Percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP

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Information Type	Description
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_DENY_F

Stamp Denied (New WTP)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (New WTP) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE for work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPDENY_F

Stamp Granted (New WTP)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (New WTP) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.

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Information Type	Description
Action Description	When this worklist is selected, the system transfers control to the manager who validates the Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPGRANTED_F

Stamp Postponed (New WTP)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (New WTP) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates a worklist entry.
Action Description	The email informs the manager that the approval for the Work time Percentage change is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STBY_F

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Delete Confirmed (New WTP)

This topic discusses the Delete Confirmed workflow in the CAE Delete (New WTP) activity.

Description

Information Type	Description
Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_PT_CHNG_DENIED
Business Event	FP_CA_DELETE_F

Double Change

This topic discusses the Double Change workflow in the CAE and Grade and Work Time Percentage Change activity.

Description

Information Type	Description
Event Description	When a grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers the control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEEWORKRT_PNL
Workflow Action	Manual

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Information Type	Description
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CHGT_RK_TPS
Business Event	FP_CA_WKRT_K

Stamp Request (Grade, WTP, and CAE Change)

This topic discusses the Stamp Request workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Information Type	Description
Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the Finance Controller who stamps the CAE allocation for the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_STMPREQ_K

CAE Denied (Grade, WTP and CAE Change)

This topic discusses the CAE Denied workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Information Type	Description
Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.

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Information Type	Description
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the Grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_DENY_K

Stamp Denied (New Grade and WTP)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager so that he deletes the CAE for grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPDENY_K

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Stamp Granted (New Grade and WTP)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPGRANTED_K

Stamp Postponed (New Grade and WTP)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the grade / work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CACH_STMP_GRP
Workflow Action	Manual

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Information Type	Description
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STBY_K

Delete Confirmed (New Grade and WTP)

This topic discusses the Delete Confirmed workflow in the CAE Delete (New Grade and Work Time Percentage) activity.

Description

Information Type	Description
Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_PT_CHNG_DENIED2
Business Event	FP_CA_DELETE_K

CAE De-allocation Request

This topic discusses the CAE De-allocation Request workflow in the Termination activity.

Description

Information Type	Description
Event Description	When a termination is in progress, once the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who de-allocates the CAE.

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Information Type	Description
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_CA_DISCHG
Business Event	FP_CA_DISCH_D

Stamp Request (CAE De-allocation)

This topic discusses the Stamp Request workflow in the CAE De-allocation activity.

Description

Information Type	Description
Event Description	When the headcount manager de-allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE de-allocation.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_STMPREQ_D

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De-allocation Denied (CAE De-allocation)

This topic discusses the De-allocation Denied workflow in the CAE De-allocation activity.

Description

Information Type	Description
Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the termination.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_DENY_D

De-allocation Denied (Stamp)

This topic discusses the De-allocation Denied workflow in the CAE De-allocation Stamp activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE for de-allocation, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who restores the CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_DSCH
Workflow Action	Manual

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Information Type	Description
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPDENY_D

Stamp Granted (CAE De-allocation)

This topic discusses the Stamp Granted workflow in the CAE De-allocation Stamp activity.

Description

Information Type	Description
Event Description	If the finance controller approves the de-allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the termination.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPGRANTED_D

De-allocation Postponed

This topic discusses the De-allocation Postponed workflow in the CAE De-allocation Stamp activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE for de-allocation, this workflow generates an email.
Action Description	An email informs the manager that the termination is postponed.

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Information Type	Description
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Email Template	FP_CA_NOTIF
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STBY_D

CAE Request

This topic discusses the CAE Request workflow in the Return activity.

Description

Information Type	Description
Event Description	When a return is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for the return
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_RETURN
Business Event	FP_CA_REINST_R

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Stamp Request (Return)

This topic discusses the Stamp Request workflow in the CAE allocation (simple return) activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_STMPREQ_R

CAE Denied (Return)

This topic discusses the CAE Denied workflow in the CAE allocation (simple return) activity.

Description

Information Type	Description
Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator

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Information Type	Description
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_DENY_R

Stamp Denied (Return)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (return) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE allocation for the return.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPDENY_R

Stamp Granted (Return)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (return) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return.
Notification Method	Worklist

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Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPGRANTED_R

Stamp Postponed (Return)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (return) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return is postponed
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STBY_R

Delete Confirmed (Return)

This topic discusses the Delete Confirmed workflow in the CAE Delete (return) activity.

Description

Information Type	Description
Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.

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Information Type	Description
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_HIRE_REFUSE2
Business Event	FP_CA_DELETE_R

Double Change (Return)

This topic discusses the Double Change workflow in the Return and Grade Change activity.

Description

Information Type	Description
Event Description	When a return and grade change activity is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_RKRETURN_H
Business Event	FP_CA_RKCHNG_H

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Stamp Request (Return and Grade Change)

This topic discusses the Stamp Request workflow in the CAE allocation (return and grade change) activity.

Description

Information Type	Description
Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return and grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_STMPREQ_H

CAE Denied (Return and Grade Change)

This topic discusses the CAE Denied workflow in the CAE allocation (return and grade change) activity.

Description

Information Type	Description
Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP

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Information Type	Description
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_DENY_H

Stamp Denied (Return and Grade Change)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (return and grade change) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPDENY_H

Stamp Granted (Return and Grade Change)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (return and grade change) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE for the return and grade change, this workflow generates a worklist entry.

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Information Type	Description
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPGRANTED_H

Stamp Postponed (Return and Grade Change)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade change) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade change process is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STBY_H

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Delete Confirmed (Return and Grade Change)

This topic discusses the Delete Confirmed workflow in the CAE Delete (return and grade change) activity.

Description

Information Type	Description
Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_REFUSE_H
Business Event	FP_CA_DELETE_H

Double Change (Return and WTP Change)

This topic discusses the Double Change workflow in the Return and Work Time Percentage Change activity.

Description

Information Type	Description
Event Description	When a return and work time percentage change process is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEEWORKRT_PNL

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Information Type	Description
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_WKRTRETURN_B
Business Event	FP_CA_WKRTCHNG_B

Stamp Request (Return and WTP Change)

This topic discusses the Stamp Request workflow in the CAE allocation (return and work time percentage change) activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_STMPREQ_B

CAE Denied (Return and WTP Change)

This topic discusses the CAE Denied workflow in the CAE allocation (return and work time percentage change) activity.

Description

Information Type	Description
Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.

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Information Type	Description
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_DENY_B

Stamp Denied (Return and WTP Change)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPDENY_B

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Stamp Granted (Return and WTP Change)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE for the Return and work time percentage change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPGRANTED_B

Stamp Postponed (Return and WTP Change)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (return and work time percentage change) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual

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Information Type	Description
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STBY_B

Delete Confirmed (Return and WTP Change)

This topic discusses the Delete Confirmed workflow in the CAE Delete (return and work time percentage change denied) activity.

Description

Information Type	Description
Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_REFUSE_B
Business Event	FP_CA_DELETE_B

Triple Change (Return, Grade, and WTP Change)

This topic discusses the Triple Change workflow in the Return, Grade, and Work Time Percentage Change activity.

Description

Information Type	Description
Event Description	When a return and grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.

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Information Type	Description
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_RKWKRTRETURN_Z
Business Event	FP_CA_RKWKRTCHNG_Z

Stamp Request (Return, Grade, and WTP Change)

This topic discusses the Stamp Request workflow in the CAE allocation (return, grade, and work time percentage) activity.

Description

Information Type	Description
Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_STMPREQ_Z

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CAE Denied (Return, Grade, and WTP Change)

This topic discusses the CAE Denied workflow in the CAE allocation (return and grade and work time percentage) activity.

Description

Information Type	Description
Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_DENY_Z

Stamp Denied (Return, Grade, and WTP Change)

This topic discusses the Stamp Denied workflow in the Stamp Assignment (return and grade and work time percentage) activity.

Description

Information Type	Description
Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and grade and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPDENY_Z

Stamp Granted (Return, Grade, and WTP Change)

This topic discusses the Stamp Granted workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Information Type	Description
Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPGRANTED_Z

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Stamp Postponed (Return, Grade, and WTP Change)

This topic discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Information Type	Description
Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STBY_Z

Delete Confirmed (Return, Grade, and WTP Change)

This topic discusses the Delete Confirmed workflow in the CAE Delete (return with grade and work time percentage change denied) activity.

Description

Information Type	Description
Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return with grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPA_CA_DENI_GRP
Workflow Action	Manual

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Information Type	Description
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_REFUSE_Z
Business Event	FP_CA_DELETE_Z

Accept Tenure

This topic discusses the Accept Tenure workflow in the Tenure Probation Period Validation activity.

Description

Information Type	Description
Event Description	When a Tenure Probation Period is in progress and the manager approves the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who grants tenure.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_ACCEPT_TENURE

Renew Tenure Probation Period

This topic discusses the Renew Tenure Probation Period workflow in the Tenure Probation Period Validation activity.

Description

Information Type	Description
Event Description	When a Tenure Probation Period is in progress and the manager renews the tenure, the system generates a worklist entry.

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Information Type	Description
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who renews the probation period.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_RENEW_TEN_PPD

Refuse Tenure

This topic discusses the Refuse Tenure workflow in the Tenure Probation Period Validation activity.

Description

Information Type	Description
Event Description	When a tenure probation period is in progress and the manager refuses the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who issues the termination order.
Notification Method	Worklist

Workflow Objects

Information Type	Description
Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_REFUSE_TENURE

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Delivered Workflows for Manage Professional Compliance

This topic discusses the Manage Professional Compliance workflows. The workflows are listed alphabetically by workflow name.

Professional Compliance Hire

This topic discusses the Professional Compliance Hire workflow in the Professional Compliance Hire activity.

Description

Information Type	Description
Event Description	A person is hired and is subsequently added to the Professional Compliance business process. **Note:** This occurs only when a default Professional Compliance Type is associated with the job code of the person being hired.
Action Description	The PCMP_BUS_PROC business process: Adds the hire notification to the new hire's general supervisor's worklist. Sends an email notification to the new hire's general supervisor.
Notification Method	Email and worklist.

Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Hire

Professional Compliance Add

This topic discusses the Manage Professional Compliance add workflow.

Description

Information Type	Description
Event Description	A person is manually added to the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the general supervisor of the person informing them that the person has been added within the Professional Compliance business process and that further action is required.
Notification Method	Email

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Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Add

Professional Compliance Classification Change

This topic discusses the Manage Professional Compliance classification change workflow.

Description

Information Type	Description
Event Description	There is a change in classification level for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of classification within the Professional Compliance business process and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Classification Change

Professional Compliance Job Change

This topic discusses the Manage Professional Compliance job change workflow.

Description

Information Type	Description
Event Description	There is a job change for a person that is part of the Professional Compliance business process.

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Information Type	Description
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of job and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Professional Compliance Recertification

This topic discusses the Manage Professional Compliance recertification workflow.

Description

Information Type	Description
Event Description	The recertification Application Engine program runs for persons in the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends a notification to the compliance supervisor informing them of lapsed or upcoming license and certification expiration dates. If the certification information is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Re-Certification

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Professional Compliance Termination

This topic discusses the Manage Professional Compliance termination workflow.

Description

Information Type	Description
Event Description	There is a termination of a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process: Add the hire notification to the worklist. Sends an email notification to the compliance supervisor of the person informing them that the employee has been terminated and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Information Type	Description
Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Delivered Workflows for Manage Variable Compensation

This topic discusses PeopleSoft Human Resources Manage Variable Compensation workflows. The workflows are listed alphabetically by workflow name.

Allocate Awards by Plan (Approval)

This topic discusses the Allocate Awards by Plan workflow.

Description

Information Type	Description
Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email

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Workflow Objects

Information Type	Description
Role	Roleuser by Emplid Qry

Allocate Awards by Plan (Denial)

This topic discusses the Allocate Awards by Plan workflow.

Description

Information Type	Description
Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Awards by Group (Approval)

This topic discusses the Allocate Awards by Group workflow.

Description

Information Type	Description
Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts for group members or the award status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Information Type	Description
Role	Roleuser by Emplid Qry

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Allocate Awards by Group (Denial)

This topic discusses the Allocate Awards by Group workflow.

Description

Information Type	Description
Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts for group members or the status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Group Funding

This topic discusses the Allocate Group Funding workflow.

Description

Information Type	Description
Event Description	Manager or approver makes changes to the variable compensation award for a group.
Action Description	Approving manager approves or denies changes to the variable compensation award for a group.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	Funds Change Event
Workflow Action	Funds Change Event
Role	Roleuser by Emplid Qry

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VC Tree Changes

This topic discusses the VC Tree Changes workflow.

Description

Information Type	Description
Event Description	Manager or approver makes changes to a variable compensation tree.
Action Description	Approving manager approves or denies changes to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	VC Tree Change Event
Workflow Action	VC Tree Change Event
Role	VC Administrator, HR Administrator

VC Tree Delete

This topic discusses the VC Tree Delete workflow.

Description

Information Type	Description
Event Description	Manager or approver makes deletions to a variable compensation tree.
Action Description	Approving manager approves or denies the deletions to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Information Type	Description
Event	VC Tree Delete Event
Workflow Action	VC Tree Delete
Role	VC Administrator

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VC Tree Rename

This topic discusses the VC Tree Rename workflow.

Description

Information Type	Description
Event Description	Manager or approver renames a variable compensation tree.
Action Description	Approving manager approves or denies the renaming of the variable compensation tree.
Notification Method	Email

Workflow Objects

Information Type	Description
Event	VC Tree Rename Event
Workflow Action	VC Tree Rename Event
Role	VC Administrator

Delivered Workflows for Plan Careers

This topic discusses the Plan Careers workflow.

(USF) Career Plan

This topic discusses the career plan workflow.

Description

Information Type	Description
Event Description	When a career plan is created or updated for an employee, a worklist entry is sent to the Supervisor.
Action Description	When a manager approves a career plan for an employee, a worklist entry is sent to the HR Developmental Staff role. When a manager disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor. When HR disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor.
Notification Method	Worklist

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Workflow Objects

Information Type	Description
Event	CAREER_PLAN
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Manager Worklist
Business Process	Career Plan
Business Activity	Develop Career Plan (USF) Review Career Plan (USF)
Business Event	Submit Plan to Manager; Manager Approves Plan; Manager Disapproves Plan; HR Disapproves Plan.

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PeopleSoft HCM Web Libraries

Understanding Web Libraries

A web library is a derived or work record the name of which starts with WEBLIB_. All PeopleSoft iScripts are embedded in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators should make sure that users have the proper access to web libraries.

For example, the default navigation system for PeopleSoft Pure Internet Architecture users is implemented by means of a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized for a particular web library or script, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

PeopleSoft HCM Web Libraries

This table lists the primary PeopleSoft HCM web libraries:

RECNAME	RECDESCR	Product	HMCD	Description
WEBLIB_CD_APP	CD Mobile app entry point	Human Resources	HMCD	This web library contains iScript functions used by the Mobile Company Directory.
WEBLIB_CHART	Web Library for Benefit Charts	eBenefits	HEB	This web library controls chart settings within the eBenefits Life Events pagelet.
WEBLIB_EOAW	Approvals iScripts	Enterprise Components	CEO	This web library contains iScript functions for Enterprise Components Approvals.
WEBLIB_EOAWEMC		Enterprise Components	CEO	This web library contains iScript functions for Enterprise Components Email Collaboration.

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RECNAME	RECDESCR	Product	HMCD	Description
WEBLIB_EOCF	Derived record for iScript	Enterprise Components	CCF	This web library contains functions for Enterprise Components Active Analytics Framework.
WEBLIB_EOEC_CCI		Enterprise Components	CEO	This web library contains functions for Enterprise Components Credit Card Integration Framework.
WEBLIB_EOEW_SDO		Enterprise Components	CEW	This web library contains functions for Enterprise Components Data Transformation utility.
WEBLIB_EOPP_LN		Enterprise Components	CPP	This web library contains functions for Enterprise Components Pagelet display.
WEBLIB_EOPP_PGT		Enterprise Components	CPP	This web library contains iScript functions for Enterprise Components pagelet display.
WEBLIB_EOPP_SC	Navigation Collection Display	Enterprise Components	CPP	This web library contains iScript functions for Navigation Collection display.
WEBLIB_EQRY	Web library for Query Builder	Shared Components	HOQM	This web library contains iScript functions for the Shared Components Object Meta Data query tool.
WEBLIB_ER	Web Library for eRecruit	Recruiting	HRS	This web library is reserved for future use by Candidate Gateway resume processing.
WEBLIB_ER2	Web Library	Recruiting	HRS	This web library is reserved for future use by Candidate Gateway Pre Employment Checks.

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RECNAME	RECDESCR	Product	HMCD	Description
WEBLIB_FIN_MBL	Mobile Approvals iScript lib	Enterprise Components	CEO	This web library contains iScript functions for the Mobile Approvals.
WEBLIB_FM_ESP	PDF Form Weblib ESP	HR Spain	HES	This web library contains iScript functions for the XML generation framework for Spain.
WEBLIB_GPCH_FM	WEBLIB_GPCH_FM	GP Switzerland	HGCH	This web library contains iScript functions used by the Switzerland regulatory forms process and submission.
WEBLIB_GPDE	Contains iScript Functions	GP Germany	HGDE	This web library contains iScript functions used by the Germany Elster process.
WEBLIB_GPDE_FM	CT Web Lib	GP Germany	HGDE	This web library contains iScript functions used by the Germany Certificate forms.
WEBLIB_HMCRWSDL	Derived Record - iScript	Shared Components	HMCR	This web library contains iScript functions used by the HCM SOA Framework to retrieve and test WSDL.
WEBLIB_HRCD	Library for Company Directory	Human Resource	HHR	This web library contains various iScript functions used by Company Directory to display directory folders and search results.
WEBLIB_HRS_HROI	Job Board Integration	Recruiting	HROI	This web library contains iScript functions for the job board integration with the Open Integration Framework.

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RECNAME	RECDESCR	Product	HMCD	Description
WEBLIB_HR_ABN	ABN Folder iScript	Human Resource	HHR	This web library contains functions for the Company Directory folder structure in the drop down menu navigation.
WEBLIB_LM	Web Library - ELM	Human Resource	HHR	This web library contains iScript functions used to display the Learning pagelet from the Talent Summary.
WEBLIB_OSHA	WEBLIB_OSHA	Human Resource	HHR	This web library contains functions for retrieving output for OSHA 300 report.

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Third Party Images Provided with Sample Data

Using Third Party Images Provided with Sample Data

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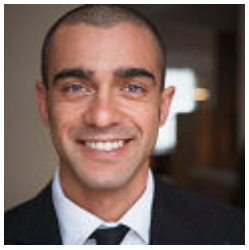
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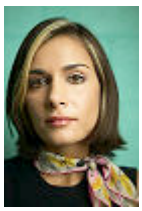
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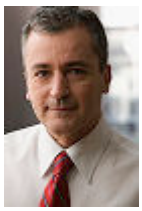
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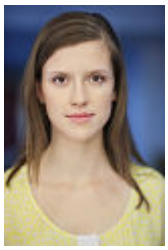
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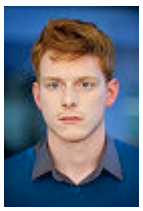
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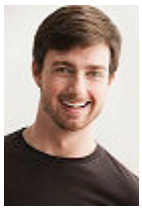
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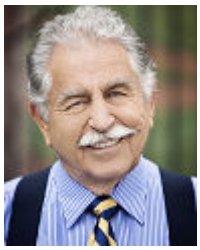
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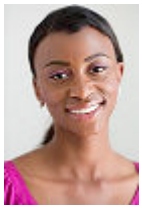
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HCM Abbreviations

HCM Abbreviations

Throughout PeopleSoft Human Capital Management (HCM) applications fields may be labeled with an abbreviation rather than with the full spelling of the field name. Those abbreviations are used in HCM applications, along with the corresponding full name.

Field or Control	Description
Abbr	Abbreviation
ACA	Affordable Care Act
Acad	Academic
Accomps	Accomplishments
Accr	Accrual
Acctng	Accounting
Accum	Accumulator
Actn	Action
Addl	Additional
Addr	Address
Adj	Adjust or adjustment
Adm	Administration or administer
ALE	Applicable Large Employer
Alloc	Allocation
Allow	Allowance
ANF	Family allowances
Anniv	Anniversary
Annl	Annual
Appl	Applicant
Appr	Approver, approve, or approved
Apvl	Approval
Asc	Ascending
Asgnmt	Assignment
Assmptn	Assumption
Avg	Average
Ben	Beneficiary
BenAdmin	Benefits administration
Benef	Beneficiary
Beneft	Benefit

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Field or Control	Description
Btn	Button
CAF	Tax Assistance Center
CAN	Canada
Calc	Calculation
Calc'd	Calculated
Calcs	Calculations
Catgy	Category
Cd	Code
Cdn	Canadian
Certif	Certification
Chartfield	Chart Field
Chk	Check
Civ	Civil
Classif	Classification
Cnt	Count
Cntb	Contribution
Cntbs	Contributions
Cntry	Country
Coll	Collaborative or collective
Compa	Comparative
Comp	Compensations
Comprate	Compensation rate
Comps	Competencies
Cond	Condition
Cont	Contract
Contrib	Contribution
Conv	Conversion
Covg	Coverage
CPDF	Central personnel data file
CPF	Central Provident Fund
Cred	Credit
Curr	Current
Cust	Customer
DDP	Direct deposit
D.D.	Direct deposit
Decl	Declaration
Decr	Decrease
Dedn	Deduction
Dedns	Deductions
Defn	Definitions

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Field or Control	Description
Dep	Dependent
Dep/Ben	Dependent/beneficiary
Dept	Department
Dept ID	Department ID
Depts	Departments
Desc	Descending
Descr	Description
Disab	Disability
Dt	Date
Dtl	Detail
Dups	Duplicates
Dyn	Dynamic
Educ	Education
EE	Employee
Eff	Effective
Effdt	Effective date
Effseq	Effective sequence
EI	Employment insurance
Elig	Eligible
Empl	Employee
Empl ID	Employee ID
Empl ID's	Employee IDs
Emplr	Employer
Empls	Employees
Encum	Encumbrance
Enrl	Enroll
Entl	Entitlement
EPF	Employee Provident Fund
ER	Employer
Erncd	Earn code
Est	Estimated
Estab	Establishment
Eval	Evaluation
Expr	Expression
Ext	External
Ext'n	Extension
FEGLI	Federal Employee Group Life Insurance
Fict	Fictitious
Fld	Field
Flds	Fields

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Field or Control	Description
Flg	Flag
Fnds	Funds
Func	Function
Genl	General
GL	General ledger
Govt	Government
Gratif	Gratification
Grd	Grade
Grp	Group
Grs	Gross
GST	Goods and service tax
H&S	Health and safety
HCE	Highly compensated employee
HIPAA	Health Insurance Portability and Accountability Act
Hlth	Health
Hol	Holiday
Hrly	Hourly
ID	Identification
Ident	Identification
ID's	Identifications
IMSS	Instituto Mexicano del Seguro Social—Social Security Institute (Mexico)
INAIL	National Injury Agency (Italy)
Incl	Include
Incr	Increase
Ind	Indicator
Indep	Independent
Indiv	Individual
Inf	Information
INPDAI	Social Security Agency for executives (Italy)
INPS	Social Security Agency (Italy)
Insur	Insurance
Int	Internal
Integ	Integration
Investig	Investigation
IR	Inland Revenue (has been renamed to HMRC)
IRB	Inland Revenue Board
IRD	Inland Revenue Department
IRPEF	Personal taxes (Italy)
ISR	Impuesto sobre la Renta—Income Tax (Mexico)

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Field or Control	Description
JCR	Job change request
JobCd	Job code
Jrnl	Journal
Lgth	Length
Lmt	Limit
Locn	Location
Lve	Leave
Lvl	Level
LWF	Labour Welfare Fund
LWOP	Leave without pay
Mag	Magnetic
Matern	Maternity
Max	Maximum
Mbrs	Members
Meas	Measure
Metropol	Metropolitan
Min	Minimum
Mins	Minutes
MPF	Mandatory Provident Fund
MPP	Maternity pay period
Msg	Message
MTD	Month to date
Mthd	Method
Mthly	Monthly
Mths	Months
Mult	Multiple or multiplication
Natl	National
Nbr	Number
Neg	Negative
NID	National identification
NOA	Nature of action
Notif	Notification
Occ	Occupational
Ofc	Office or official
Oper	Operating
Opr ID	Operator ID
Optn	Option
Ord	Ordinary
Ovrd	Override
Parm	Parameter

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Field or Control	Description
Parms	Parameters
PAYE	Pay as you earn
PB	Push button
Pct	Percent
Perf	Performance
Pers	Personal
Pgm	Program
PI	Positive input
PIN_NUM	Personal identification number
Posn	Position
Prc	Process
Prcs	Processes
Prd	Period
Prds	Periods
Pref	Preferred
Prev	Previous
Probtn	Probation
Prog	Program
Pygrp	Paygroup
QIT	Quebec Income Tax
QPIP	Quebec Parental Insurance Plan
QPP	Quebec Pension Plan
Qstn	Question
QTD	Quarter to date
Rcd	Record
Reev	Reevaluation
Reg	Regional, registry, or regular
Remun	Remuneration
Reproc	Preprocess
Req	Requisition
Reqd	Required
Reqt	Requirement
RFC	Registro Federal de Contribuyente—Federal Registry for the Payee (Mexico)
Rfnd	Refund
RITS	Reserve Bank Information and Transfer System
RL	Relevé
RMG	Average Daily Rate (Italy)
ROE	Record of Employment
ROST	Register of separations and transfers
Rptg	Reporting

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Field or Control	Description
Rqmts	Requirements
Rqst	Request
Rslt	Result
Rt	Rate
Run Ctrl	Run control
Sal	Salary
Sched	Schedule or scheduled
SCON	Scheme contracted out numbers
Sen	Seniority
Seq	Sequence
SeqNum	Sequence number
Serv	Service
Set ID	Set ID
Set IDs	Set IDs
Sev	Severance
SINQ	Suspense Inquiry and Correction System
SJT	Security Join table
SocSec	Social Security
Spcl	Special
SSP	Statutory sick pay
Stnd	Standard
Stnd Hrs	Standard hours
Stds	Standards
Str	String
Summ	Summary
Suppl	Supplementary
Supv	Supervisor
SWT	State withholding tax
T&L	Time and labor
TL	Time and labor
Tbl	Table
TCD	Time collection device
TFR	Termination Payments (Italy)
Tgt	Target
Tmp	Temporary
Tmplt	Template
TR	Tuition Reimbursement
TRC	Time reporting code
TRCs	Time reporting codes
Trmntn	Termination

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Field or Control	Description
Txbl	Taxable
Upd	Update
Vacn	Vacation
Var	Variable
Ver	Version
Vol	Volume
WAO	Wet op de arbeidsongeschiktheidsverzekering Disability Insurance Act (The Netherlands)
WCB	Workers' Compensation Board
WIGI	Within grade increases
wrk	Worker
XFER	Transfer
XLAT	Translate
XSLT	XSL (Extensible Stylesheet Language) transformations
YTD	Year to date
ZVW	Zorgverzekeringswet—Health Care Insurance Act (The Netherlands)

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PeopleSoft Application Fundamentals for HCM Reports

Basic PeopleSoft HCM Reports: A to Z

These tables list basic PeopleSoft HCM reports as well as reports for specific PeopleSoft Human Resources business processes sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topics in the product documentation.
- *PeopleTools: PeopleSoft Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*
- *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with this online documentation.

Basic HCM Reports

Report ID and Report Name	Description	Navigation	Run Control Page
AWEAUDIT Approvals Audit Report	Report includes data regarding approval transaction requests associated with the Approval Framework.	**Workforce Administration**, and then **Self-Service Transactions**, and then **Approvals and Delegation**, and then **Approvals Audit Report**, and then **Approvals Audit Report**	HCSCAWE_RUN_CNTL
FGHR005 Salary Grade Table USF report	Print the contents of the Federal Salary Grade tables in various formats.	**Set Up HCM**, and then **Product related**, and then **Compensation**, and then **Salary Grade Report USF**, and then **Pay Table**	RUN_FGHR005
FGPER802 Geographic Location report	Produces a detailing of the Geographic Location Table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Geographic Location Report USF**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FGPER803 Agency report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Agency Report Table USF**	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Subagency Table USF**	PRCSRUNCNTL
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Personnel Office ID Table**	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Compensation**, and then **Locality Pay Area Report**	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Compensation**, and then **LEO Pay Area Report**	PRCSRUNCNTL
FGPER811 Handicap Table report	Prints all disabilities and their associated codes. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Handicap Reports USF**	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Legal Authority Table USF**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Nature of Action Reports USF**	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Nature of Action/ Authority 1**	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Priority Placement Table USF**	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Work Location Reports USF**	PRCSRUNCNTL
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports USF**, and then **Job Code Table USF**	PRCSRUNCNTL
GBP001 Group Member Overlapping	Shows when members belong to more than one group.	**Set Up HCM**, and then **Common Definitions**, and then **Group Build**, and then **Group Build Overlapping**	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	**Set Up HCM**, and then **Common Definitions**, and then **Group Build**, and then **Group Build Membership**	RUNCTL_GBP002
PAY701 Bank/Branch	Lists banks/branches entered in the Bank/ Branch table.	**Set Up HCM**, and then **Common Definitions**, and then **Banking**, and then **Bank/Branch Report**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PAY710 ChartField Transaction Report	Lists ChartField codes used in transactions.	**Set Up HCM**, and then **Common Definitions**, and then **ChartField Configuration**, and then **ChartField Transaction Report**	PRCSRUNCNTL
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	**Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll Reports**, and then **Pay Group Table**	PRCSRUNCNTL
PAY717 Earnings Program Table	Prints a detailing of your pay plan definitions.	**Set Up HCM**, and then **Product Related**, and then **Payroll Interface**, and then **Payroll Reports**, and then **Earnings Program**	PRCSRUNCNTL
PAY760 Combination Code Report	Lists account codes set up in the Combination Code Table.	**Set Up HCM**, and then **Common Definitions**, and then **ChartField Configuration**, and then **Combination Code Report**	PRCSRUNCNTL
PER506 Security Tree Audit	Lists discrepancies between entries in the Departments component and departments on department security trees.	**Set Up HCM**, and then **Security**, and then **Core Row Level Security**, and then **Security Tree Audit Report**	PRCSRUNCNTL
PER701 Department Table report	Lists all departments by Department ID. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Department Table Report**	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number. (BI Publisher)	**Set Up HCM**, and then **Install**, and then **Installation Table Report**	PRCSRUNCNTL
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future). (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Location Table Report**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Organization**, and then **Company Table Report**	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries – character codes. (BI Publisher)	**Set Up HCM**, and then **Install**, and then **Country Table Report**	PRCSRUNCNTL
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Jobcode Rpt USA**	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Jobcode Table Report CAN**	PRCSRUNCNTL
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Job Attributes**, and then **Job Code Table Report**	PRCSRUNCNTL
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table. (BI Publisher)	**Set Up HCM**, and then **Common Definitions**, and then **Letters and Documents**, and then **Standard Letter Report**	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Currency and Market Rates**, and then **Currency Code Table**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER714 Currency Rate Table report	Prints information about exchange rates. (BI Publisher)	**Set Up HCM**, and then **Foundation Tables**, and then **Currency and Market Rates**, and then **Currency Rate Report**	PRCSRUNCNTL

Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D. Before using this page, you must have run the CAR001 report process.	**Benefits**, and then **Provide Company Cars**, and then **Print P11D Information**	RUNCTL_COMPCAR001
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	**Benefits**, and then **Provide Company Cars**, and then **Create List of Cars**	PRCSRUNCNTL

Administer Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP013 Update Seniority Pay Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay – Load Data process (HR_CMP013_CI) to load the changes to Job.	**Workforce Administration**, and then **Collective Processes**, and then **Seniority Processing**, and then **Update Seniority Pay**	RUNCTL_SENPAY2

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP014S Update Seniority Eligibility Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig – Load Data process (HR_CMP014_CI) to load the changes to Job.	**Workforce Administration**, and then **Collective Processes**, and then **Seniority Processing**, and then **Update Seniority Eligibility**	RUNCTL_SENPAY
CMP015 Refresh Employee Compensation	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	**Workforce Administration**, and then **Collective Processes**, and then **Refresh Compensation**	RUNCTL_CMP015
CMP016 Defaulting Rules Eligibility	Lists the workers eligible for the selected defaulting rules as of selected date.	**Set Up HCM**, and then **Foundation Tables**, and then **Compensation Rules**, and then **Defaulting Rules Eligibility Rpt**	RUNCTL_CMP016

Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	**Set Up HCM**, and then **Product Related**, and then **Benefits NLD**, and then **Reports**, and then **Pay Groups**	PRCSRUNCNTL
INT004NL Earnings Table (NLD)	Reviews all the valid earnings codes that you entered into the system, along with the payroll calculation characteristics that you assign to each.	**Set Up HCM**, and then **Product Related**, and then **Benefits NLD**, and then **Reports**, and then **Earnings**	PRCSRUNCNTL
INT005NL Deductions / Frequency (NLD)	Reviews all the valid deduction codes that are entered into the system. The SQR is sorted by plan type, deduction code, and effective date.	**Set Up HCM**, and then **Product Related**, and then **Benefits NLD**, and then **Reports**, and then **Deductions**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
INT006NL General Deduction/ Frequency (NLD)	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the worker pay frequency, and any additional flat deduction amounts.	**Set Up HCM**, and then **Product Related**, and then **Benefits NLD**, and then **General Deduction/Frequency**	PRCSRUNCNTL

Administer Salary Packaging Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PKG003 Packages Due for Review	Displays all workers with packages ready for review.	**Compensation**, and then **Salary Packaging AUS**, and then **Create Packaging Reports**, and then **Packages Due For Review**	RUNCTL_PKG003
PKG004 Package Model	Enables you to report on an applicant or a worker's salary package. The information contained in the report displays the details from the worker / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	**Compensation**, and then **Salary Packaging AUS**, and then **Create Packaging Reports**, and then **Package Models**	RUNCTL_PKG004
PKG006 FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	**Compensation**, and then **Salary Packaging AUS**, and then **Create Packaging Reports**, and then **FBT Reconciliation**	RUNCTL_PKG006

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Report ID and Report Name	Description	Navigation	Run Control Page
PKG007 Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on a worker only basis, requires a start and end date of the period of time you want to report on.	**Compensation**, and then **Salary Packaging AUS**, and then **Create Packaging Reports**, and then **Package Details**	RUNCTL_PKG007

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for workers. (SQR)	**Administer Training**, and then **Training Reports**, and then **Standard Form -182**	RUNCTL_SF182
MXSTP001 (Format) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	**Administer Training**, and then **Training Reports**, and then **STPS DC-1 Format MEX**	RUNCTL_STP001
MXSTP002 MXSTP002 (Reverse)	See above.	**Administer Training**, and then **Training Reports**, and then **STPS DC-1 Format MEX**	RUNCTL_STP001
MXSTP003 (Format) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	**Administer Training**, and then **Training Reports**, and then **STPS DC-2 Format MEX**	RUNCTL_STP003
MXSTP004 MXSTP004 (Reverse)	See above.	**Administer Training**, and then **Training Reports**, and then **STPS DC-2 Format MEX**	RUNCTL_STP003

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Report ID and Report Name	Description	Navigation	Run Control Page
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	**Administer Training**, and then **Training Reports**, and then **STPS DC-2B Format MEX**	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/ Events Certificates	Creates a Courses/ Events Certificate.	**Administer Training**, and then **Training Reports**, and then **STPS DC-3 Format MEX**	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/ Events Certificates List	Creates a Courses/ Events Certificates list.	**Administer Training**, and then **Training Reports**, and then **MEX STPS DC-4 Format**	RUNCTL_STP007
MXSTP008 (Format) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	**Administer Training**, and then **Training Reports**, and then **STPS DC-5 Format MEX**	RUNCTL_STP008
MXSTP009 MXSTP009 (Reverse)	See above	**Administer Training**, and then **Training Reports**, and then **STPS DC-5 Format MEX**	RUNCTL_STP008
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Courses**	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word)	**Administer Training**, and then **Student Enrollment**, and then **Create Training Letters**	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Administer Training Roster**	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training enrollment status**	RUNCTL_TRN003

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (BI Publisher)	**Administer Training**, and then **Training Reports**, and then **Administer Training Schedules**	RUNCTL_TRN004
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (BI Publisher)	**Administer Training**, and then **Training Reports**, and then **Administer Training Facility**	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	**Administer Training**, and then **Training Budget**, and then **Budget Reports**, and then **Active Training Summary**	RUNCTL_TRN010
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	**Administer Training**, and then **Training Budget**, and then **Budget Reports**, and then **Training Global Summary**	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/ certifications that students receive on successful completion of a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Target Course Certifications**	RUNCTL_TRN016
TRN017 Course Rating	Details ratings for sessions of a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Course Rating Report**	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	**Administer Training**, and then **Course Reports**, and then **Course Attendance Status**	RUNCTL_TRN018
TRN019 Course Rating Template	Serves as the evaluation template to be completed by students enrolled in a course session. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Course Rating Template**	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (BI Publisher)	**Administer Training**, and then **Training Reports**, and then **Training Student Programs**	RUNCTL_TRN020

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN021 Training Program	Lists the training program for a worker. (SQR)	**Administer Training**, and then **Training Reports**, and then **Administer Training Programs**, and then **Administer Training Programs**	RUNCTL_TRN021
TRN022 Statistics of EEs Enrolled (statistics of workers enrolled)	Lists the workers who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	**Administer Training**, and then **Training Reports**, and then **Statistics of EEs Enrolled**, and then **Course Statistics**	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Course Description**	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Course Category**	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Course Equipment**	RUNCTL_TRN025
TRN026 Training Course Vendors	Lists vendors that are associated with a course on the Course Table. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Course Vendors**	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Prerequisite Courses**	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (BI Publisher)	**Administer Training**, and then **Course Reports**, and then **Training Qualifications**	RUNCTL_TRN028

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of workers in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page. (BI Publisher)	**Administer Training**, and then **Training Reports**, and then **2483 Tax Declaration FRA**	RUNCTL_TRN029
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved workers by the course duration. (SQR)	**Administer Training**, and then **Training Budget**, and then **Budget Reports**, and then **Training Budget Plan Summary**	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with a worker who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, worker expense, and session expense. (SQR)	**Administer Training**, and then **Training Reports**, and then **EE Session Cost Summary**	RUNCTL_TRN032
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (BI Publisher)	**Administer Training**, and then **Training Reports**, and then **Training Instructor Schedules**	RUNCTL_TRN033

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	**Administer Training**, and then **Training Reports**, and then **Training Equipment Checklist**	RUNCTL_TRN034
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	**Administer Training**, and then **Training Budget**, and then **Budget Reports**, and then **Training Plan Distribution FRA**	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	**Administer Training**, and then **Training Budget**, and then **Budget Reports**, and then **Training Plan Cost Details FRA**	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists the contract history for a selected worker or all workers. You can specify a date range for the report for include all contract history.	**Workforce Administration**, and then **Job Information**, and then **Contract Administration**, and then **Contract Information Report**	RUNCTL_CNT001

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Report ID and Report Name	Description	Navigation	Run Control Page
CTPS_RCP_BRA CTPS Receipt	Generates a receipt for the employee when the employee delivers his or her CTPS National ID to the HR department for validation.	**Workforce Administration**, and then **Workforce Reports**, and then **CTPS Receipt BRA**	CTPS_RC_BRA
ERE_RPT_ESP ERE Report ESP	Generates an ERE request (BI Publisher).	**Workforce Administration**, and then **ERE Procedure ESP**, and then **ERE Data Report ESP**	ERE_RC_DTA1_ESP
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Print Wage/ Separation USF**	GVT_PRINT_ES931
FGHR017 Personnel Actions History	Lists all workers affected by each of the job actions you enter. It prints the following information: name, department, effective date, and reason for the action. For each worker the report lists original hire date, total years of service, worker type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Personnel Actions History USF**	RUNCTL_FGHR017
FGPER810 Award Type Table	Generates an award type table report. (BI Publisher)	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Award Actions Reports USF**	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Appointment Affidavits USF**	RUNCTL_FGSF61
FGSF75 Request for Preliminary Employment Data	Produces a Request for Preliminary Employment Data form.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Preliminary Employee Report**	RUN_CNTL_FGSF75

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Report ID and Report Name	Description	Navigation	Run Control Page
FGSF50 and FGSF52 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify worker and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	• **Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Request Personnel Action USF** • **Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Notice of Personnel Action USF**	RUNCTL_PAR
HR_EDM_NLD First Day Notification NLD	The First Day Notification (Eerste Dag Melding) notifies the tax authority of new employees prior to their start date.	**Workforce Administration**, and then **Workforce Reports**, and then **First Day Notification NLD**	RUNCTL_EDM_NLD
MILRNKNOT Generate Rank Change Notices	Generate military rank change notices for one or several service members.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Generate Rank Change Notices**	MIL_NOTICE_RUN_CTL
PER001 Department Action Notices	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.	**Workforce Administration**, and then **Workforce Reports**, and then **Department Action Notices List**	PRCSRUNCNTL
PER001CH CHE Company Statistics	This report provides information on worker wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.	**Workforce Monitoring**, and then **Company Statistics CHE**	RUNCTL_PER001_CHE

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Report ID and Report Name	Description	Navigation	Run Control Page
PER002 Employee Birthdays	Lists workers, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Personal Information**, and then **Biographical**, and then **Birthdays Report**	RUNCTL_PER002
PER003 Years of Service	Lists workers who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Years of Service Report**	RUNCTL_PER003
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each worker in the system. Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Personal Information**, and then **Personal Relationships**, and then **Emergency Contacts Report**	PRCSRUNCNTL
PER005 Employees on Leave of Absence	Lists all workers on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the worker's expected return date or as a reminder for you to enter the return from leave information in the system. Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Leave of Absence Report**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER006 Mailing Labels	Produces a three-across set of mailing labels for all workers in your PeopleSoft Human Resources database. (BI Publisher) Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Personal Information**, and then **Biographical**, and then **Mailing Labels Report**	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Temporary Employees Report**	RUNCTL_ASOFDATE
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the worker counts as of the date you specify.	**Workforce Administration**, and then **Workforce Reports**, and then **Employee Turnover Analysis**	RUNCTL_FROMTHRU
PER015 Personnel Actions History	Lists all workers affected by each of the job actions you enter.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Personnel Actions Report**	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all workers with addresses and home phone numbers.	**Workforce Administration**, and then **Biographical**, and then **Home Address Report**	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all workers with job action notices scheduled for a future date.	**Workforce Administration**, and then **Workforce Reports**, and then **Pending Future Actions Report**	RUNCTL_ASOFDT_COMP
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	**Workforce Administration**, and then **Workforce Reports**, and then **Database Audit**	RUNCTL_FROMTHRU

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Report ID and Report Name	Description	Navigation	Run Control Page
PER032 Passport/Visa Expiration	Lists workers 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.	**Workforce Administration**, and then **Personal Information**, and then **Citizenship**, and then **Passport/Visa Expiration Audit**	PRCSRUNCNTL
PER033 Citiznship/Country/ Visa Audit	Lists discrepancies between worker citizenship country/ status and visa data. Displays various discrepancies found for the worker citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	**Workforce Administration**, and then **Personal Information**, and then **Citizenship**, and then **Citiznship/Country/ Visa Audit**	PRCSRUNCNTL
PER038NL DIVERSITEIT RAPPORT	Produces the required diversity statistics information related to the number of people in the workforce born in a so-called target country, or of whom one of the parents has been born in one such country.	**Workforce Administration**, and then **Personal Information**, and then **Diversity Compliance NLD**, and then **Diversity Reporting**	RUNCTL_PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled workers and additional information about their disabilities.	**Workforce Administration**, and then **Personal Information**, and then **Disability**, and then **Heavily Disabled GER**	DSB_RUNCTL_GER

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Report ID and Report Name	Description	Navigation	Run Control Page
PER058 Primary Job Audit	Lists all people whose job records show potential problems.	**Workforce Administration**, and then **Workforce Reports**, and then **Primary Job Audit**	RUNCTL_PER058
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	**Workforce Administration**, and then **Personal Information**, and then **Disability**, and then **Disability Report ITA**	RUNCTL_PER060
PER063JP Appointment Notification JPN	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual worker notifications of hire, rehire, retirement, transfer, and promotion.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Appointment Notification JPN**	RUNCTL_NTF_JPN
PER064JP Appointment List JPN	Runs appointment list reports.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Appointment List JPN**	RUNCTL_NTF2_JPN
PER065JP Completion of IC Transfer JPN	Lists workers on temporary intercompany transfer.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Completion of IC Transfer JPN**	RUNCTL_PER065_JPN
PER066BE Termination Notification	Provides details of the contractual and compensation implications for a Belgian employer in case of a termination, based on the notification period according to the Claeys formula.	**Workforce Administration**, and then **Collective Processes**, and then **Administration BEL**, and then **Create Notification**	RUNCTL_PER066_BEL
PER066IT ITA Hiring Letters	Produces the hiring letter which is printed at hiring time and is signed by worker and employer. It gives details of the terms of the job, including probation period and duration.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Hire Letter ITA**	RUNCTL_PER066_ITA

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Report ID and Report Name	Description	Navigation	Run Control Page
PER066JP Employee Assignment List JPN	Lists workers by department, including Additional Appointment workers.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Employee Assignment List JPN**	RUNCTL_EMPLIST_JPN
PER067BEL Social Report	Reports a variety of employer/worker information required by the government.	**Workforce Administration**, and then **Workforce Reports**, and then **Social Report BEL**	RUNCTL_PER067_BEL
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Hire Report CAN**	RUNCTL_FROMTHRU
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active workers within each defined area code(s) employed within the date range.	**Workforce Administration**, and then **Personal Information**, and then **OEE Workforce Survey CAN**, and then **Groups by OCC Group Report**	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	**Workforce Administration**, and then **Personal Information**, and then **OEE Workforce Survey CAN**, and then **Groups by Emplymt Type Rpt**	RUNCTL_FTCANAC

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Report ID and Report Name	Description	Navigation	Run Control Page
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	**Workforce Administration**, and then **Personal Information**, and then **OEE Workforce Survey CAN**, and then **Workforce Survey Stats**	RUNCTL_PER105CN
PER106CN OEE Groups/Jobs Filled/Vacatd	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active workers within the defined area code(s) employed within the date range.	**Workforce Administration**, and then **Personal Information**, and then **OEE Workforce Survey CAN**, and then **Groups/Jobs Filled/ Vacated**	RUNCTL_FTCANAC
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade. (BI Publisher)	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Salary Grade**	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Salary Grade/Step**	RUNCTL_PER706B

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Report ID and Report Name	Description	Navigation	Run Control Page
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action. (BI Publisher)	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Action Reason Report**	PRCSRUNCNTL
PER801SG Employee Listing	Provides worker information based on the run control selections of Department, Name, or EmplID.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Employee Listing SGP**	RUNCTL_EMP_LIST
PHASED1 Phased Retirees Details	Agencies can run this report to review active phased retirees. They can also view reports by defined time frames for employees who opted for phased retirement, phased retirees who returned to full or part-time employment, and former phased retirees who retired.	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Phased Retiree Details USF**	GVT_PH_RPT_RUN
SOCS_AFI_ESP AFI Report	The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. This file is submitted to the social security authorities.	**Workforce Administration**, and then **Workforce Reports**, and then **Phased**	RC_SOCS_AFI_ESP
TAS001 Temp Assignment w/out End Date	Lists workers currently on temporary assignment where end dates have not been defined.	**Workforce Administration**, and then **Job Information**, and then **Temporary Assignments**, and then **Assignments Without End Dates**	RUNCTL_TAS001
TAS002 Temp Assignment due to Complete	Lists workers due to complete temporary assignments within user specified date range.	**Workforce Administration**, and then **Job Information**, and then **Temporary Assignments**, and then **Temp Assignments Due Report**	RUNCTL_TAS002

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Report ID and Report Name	Description	Navigation	Run Control Page
XML_LOADPRNT Print a XML File	Generates ERE XML files (BI Publisher).	**Workforce Administration**, and then **ERE Procedure ESP**, and then **ERE SPEE Communications ESP**	ERE_RC_XML

Manage Base Benefit Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants Rpt	Lists active health plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	**Benefits**, and then **Reports**, and then **Participation**, and then **Health Plan Participants**	RUNCTL_ASODATE_BEN
BEN002 Life Insurance Participants Rpt	Lists active life plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	**Benefits**, and then **Reports**, and then **Participation**, and then **Life Insurance Participants**	RUNCTL_ASODATE_BEN
BEN003 Benefit Contributions	Summarizes benefit contributions by worker and employer.	**Benefits**, and then **Reports**, and then **Contributions and Deductions**, and then **Benefit Contribution Register**	RUNCTL_BEN003
BEN003CN Benefit Contributions Can.	Summarizes benefit contributions by worker and employer for Canadian companies. This report is the same as BEN003.	**Benefits**, and then **Reports**, and then **Contributions and Deductions**, and then **CAN-Contribution Register**	RUNCTL_BEN003CN
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for workers participating in savings plans with investment allocations. This program also creates an interface file for use by third-party administrators.	**Benefits**, and then **Reports**, and then **Participation**, and then **Saving Investment Distribution**	RUNCTL_BEN004

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN007 Leave Accruals	This report displays leave accrual information by leave plan and worker. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.	**Benefits**, and then **Reports**, and then **Participation**, and then **Leave Accrual**	RUNCTL_BEN_LANG
BEN008 Section 415 Compliance Rpt	The report lists worker amounts either over or under the Section 415 limit. It includes: Company, EmplID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.	**Benefits**, and then **Reports**, and then **Regulatory and Compliance**, and then **Section 415 Compliance**	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance Rpt	BEN009 reports on workers who have exceeded the Section 415 limits. It includes: Company, EmplID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.	**Benefits**, and then **Reports**, and then **Regulatory and Compliance**, and then **Section 415 Noncompliance**	RUNCTL_ASODATE_BEN

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN020 FMLA Status Report	Displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests. You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those workers who will soon be going out on leave; what follow-up is needed to support the leaves; those workers who will soon exhaust their leave entitlement.	**Benefits**, and then **Track FMLA (Family Medical Lv)**, and then **Status Report**	RUNCTL_BEN020
BEN021 FMLA Payroll Audit	For workers on FMLA leave or who have recently completed leaves, displays EmplID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid), and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system.	**Benefits**, and then **Track FMLA (Family Medical Lv)**, and then **FMLA Audit Report**	RUNCTL_BEN021

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN022 BEN023 HIPAA Medical Certificates	BEN022 prints a eighteen-month history of a former worker's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	**Benefits**, and then **Reports**, and then **Regulatory and Compliance**, and then **HIPAA Compliance Report**	RUN_CNTL_HIPAA
BEN040 Billing Statement	Prints a bill for all workers with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	**Benefits**, and then **Benefits Billing**, and then **Create Statements**, and then **Print Billing Statement**	RUNCTL_BEN040

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN041 Delinquent Accnt	Displays charge and payment activity for workers who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table. You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.	**Benefits**, and then **Benefits Billing**, and then **Reports**, and then **Billing Delinquent Accounts**	RUNCTL_BEN041
BEN042 Receivable Report	Displays all payment activity, include the amounts paid and how the amounts were applied. You can use this report to verify the dollar amount of payments received from workers. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.	**Benefits**, and then **Benefits Billing**, and then **Reports**, and then **Billing Receivable Report**	RUNCTL_BEN042

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN043 Billing History	Displays all billing account activity for a specific period of time, by worker. Use this report to answer questions from workers regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.	**Benefits**, and then **Benefits Billing**, and then **Reports**, and then **Billing History Activity**	RUNCTL_BEN043
BEN044 Billing Calculation Errors	Lists billing calculation errors.	**Benefits**, and then **Benefits Billing**, and then **Review Processing Results**, and then **Billing Error Report**	RUNCTL_BILL_CAL
BEN045 Benefits Billing Audit	Displays workers with open charges and open credits; active enrollments audit; inactive enrollments audit; workers with holds longer than three months; and enrollment holds longer than three months. Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for workers with open charges and credits when an error condition exists.	**Benefits**, and then **Benefits Billing**, and then **Reports**, and then **Benefits Billing Audit**	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN050 Primary Jobs Audit	Identifies workers without a record in the Primary Jobs table, workers without a job in the Primary Jobs table, workers without a primary job flag turned on, workers without a primary job indicated for a specific benefit record, and, workers with more than one primary job designated for a specific benefit record number.	**Benefits**, and then **Maintain Primary Jobs**, and then **Benefits Primary Job Audit**	RUNCTL_BEN050
BEN110 Snapshot Premium Reporting	Using the results from the Benefits Enrollment Snapshot, calculates the full premium due to a benefit provider and reports the coverage and premium amount for each covered employee, sorted by Vendor and Plan Type. You can run this report three ways: (1) Run just the "Snapshot Premium - Calculation" process, which is an Application Engine which calculates and stores the individual premiums; (2) Run just the "Snapshot Premium - Report" which is an SQR report that uses the previously calculated premiums to report by Vendor and Plan Type; or (3) Run the combined "Snapshot Premium Reporting" job, which links both the calculation process and the reporting process together into a single run using the same run control criteria.	**Benefits**, and then **Interface with Providers**, and then **Snapshot Premium**	RUNCTL_BEN110

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN140 Ben Billing Payment Interface	This program reads payment information from a third-party interface file and posts those payments against open accounts. Lists information about Benefits Billing payments processed by the batch interface process. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	**Benefits**, and then **Benefits Billing**, and then **Billing Interface**, and then **Billing Post Payment From File**	RUNCTL_BEN_LANG
BEN141 A/R Interface	The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds worker information, the other holds the accounting information for the Benefits Billing charges and charge adjustments. Use this report to report to interface billing charges to an accounts receivable system.	**Benefits**, and then **Benefits Billing**, and then **Billing Interface**, and then **Provide Billing to AR**	RUNCTL_BILL_CAL

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN701 FSA Benefit Table Listing	Lists information in the Flexible Spending Account Table. Use this report to verify that you have correctly updated and made changes to the table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Flexible Spending Account**	RUNCTL_BEN_LANG
BEN703 Disability Plan Table Listing	Prints information from the Disability Plan Table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Disability Plan**	RUNCTL_BEN_LANG
BEN704 Age-Graded Rate Table Listing	The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and worker for each set of your age-graded rates.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Rate/Rule Reports**, and then **Age Coverage Rate**	RUNCTL_BEN_LANG
BEN705 Life AD/D Table Listing	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Life AD/D Plan Table**	RUNCTL_BEN_LANG
BEN707 Savings Plan/ Investment Table	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the worker deductions and employer contributions and investment options.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Savings Plan**	RUNCTL_BEN_LANG
BEN708 Calculation Rules Tbl Listing	Lists calculation rules information by calculation rule ID.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Rate/Rule Reports**, and then **Calculation Rules**	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN709 Benefit Plan Table Listing	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Benefit Plan**	RUNCTL_BEN_LANG
BEN710 Leave Plan Table Listing	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Leave Plan-Basic Attributes**	RUNCTL_BEN_LANG
BEN710A Leave Plan Table (Svc Rates)	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Leave Plan-Accrual and Bonus**	RUNCTL_BEN_LANG
BEN711 Retirement Plan Table Listing	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Retirement Plan**	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN713 Benefit Program	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, dependent rules, and payroll rules. This report serves as an audit trail for the information defined on the Benefit Program table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Benefit Program**	RUNCTL_BEN713
BEN714 Service Rate Table Listing	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and worker portion. This report serves as an audit trail for the information defined on the Service Rate table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Rate/Rule Reports**, and then **Service Rate**	RUNCTL_BEN_LANG
BEN715 Vacation Buy/Sell Plan Listing	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts. This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Vacation Buy/Sell**	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN716CN Pension Plan Table Listing 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Pension Plan–Canada- Basic**	RUNCTL_BEN_LANG
BEN717CN Pension Plan Table Listing 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Pension Plan-Canada-Rates**	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN718CN Pension Plan Table Listing 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Pension Plan-Canada-Limits**	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table Listing	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement. This report serves as an audit trail for the information defined on the FMLA Plan table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **FMLA (Family Medical LV)**, and then **FMLA Plan Table Report**	RUNCTL_BEN_LANG
BEN721 Limit Table List.	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan. This report serves as an audit trail for the information defined on the Limit table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Rate/Rule Reports**, and then **Limit Table**	RUNCTL_ASODATE_BEN

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN731 Salary Rate Table	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID. This report serves as an audit trail for the information defined on the Salary Rate table.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Rate/Rule Reports**, and then **Salary Rate**	RUNCTL_ASODATE_BEN
BEN733 Base Benefit Audit Report	Summarizes potential worker data error conditions as related to Base Benefits business process. Includes workers without Employment records, workers without Job records, workers under 16 years old, workers with unusual dependents signed up for coverage, workers with spouses (or other dependents) both electing health benefits, workers with overage dependent coverage, and workers with incorrect health plans set up on the Benefit Program Table.	**Benefits**, and then **Reports**, and then **Audits**, and then **Base Benefits Consistency Audit**	RUNCTL_BEN_LANG
BEN734 Court Orders Audit Report	Lists workers not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	**Benefits**, and then **Reports**, and then **Audits**, and then **Court Ordered Coverage Audit**	RUNCTL_BEN734

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN740 Billing Calendar Table Listing	Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period. Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Billing**, and then **Calendar Report**	RUNCTL_BEN_LANG
CBR001 COBRA Qualify Ltr	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	**Benefits**, and then **Administer COBRA Benefits**, and then **Manage Automated Participation**, and then **COBRA Notification Letter**	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	**Benefits**, and then **Administer COBRA Benefits**, and then **Manage Automated Participation**, and then **COBRA Secondary Letter**	RUNCTL_CBR002
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	**Benefits**, and then **Administer COBRA Benefits**, and then **Terminate COBRA Coverage**, and then **COBRA Termination Letter**	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	**Benefits**, and then **Administer COBRA Benefits**, and then **COBRA Enrollment Letter**	RUNCTL_CBR004

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Report ID and Report Name	Description	Navigation	Run Control Page
CBR005 COBRA Event Summary	Lists all workers for whom a COBRA event occurred, along with the event status.	**Benefits**, and then **Administer COBRA Benefits**, and then **Review Processing Results**, and then **COBRA Event Summary Report**	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	**Benefits**, and then **Administer COBRA Benefits**, and then **Review Processing Results**, and then **COBRA Enrollment Report**	RUNCTL_CBR006
CBR007 COBRA Audit	Displays active workers enrolled in COBRA health coverage; workers and spouses (or other dependents) electing health benefits for the same dependent ID; and workers who have overage dependents.	**Benefits**, and then **Administer COBRA Benefits**, and then **Review Processing Results**, and then **COBRA Audit Report**	RUNCTL_ASODATE_BEN
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	**Benefits**, and then **Administer COBRA Benefits**, and then **Review Processing Results**, and then **COBRA Error Report**	RUNCTL_CBR008
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	**Benefits**, and then **Interface with Providers**, and then **FEHB Reconciliation Report**	GVT_RUN_FGPY017

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Report ID and Report Name	Description	Navigation	Run Control Page
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	**Benefit**, and then **Conduct Nondiscrimination Tsts**, and then **Section 401 Testing**, and then **401 Testing Report**	RUNCTL_NDT004
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs:. *NDT005:* Eligible Cross Section Test (eligible employees test) *NDT006:* 55% Average Benefits Test *NDT007:* Section 129 Concentration Test (5% Owner Test)	**Benefit**, and then **Conduct Nondiscrimination Tsts**, and then **Section 129 Testing**, and then **129 Testing Report**	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	**Benefits**, and then **Reports**, and then **Contributions and Deductions**, and then **Payroll Interface Deductions**	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/ Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	**Set Up HCM**, and then **Product Related**, and then **Base Benefits**, and then **Plan Reports**, and then **Provider/ Vendor Listing**	RUNCTL_PAYVNDR
RDED001 Retroactive Deductions Requested - 'Not Processed Status	Lists retroactive deduction requests that have not been processed.	**Payroll for North America**, and then **Retroactive Payroll**, and then **Reports**, and then **Retro Benefit/Deduction Rpts**, and then **Retro Ben/Ded Pending Request Summry**	RUNCTL_RTRODED1

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Report ID and Report Name	Description	Navigation	Run Control Page
RDED002 Retroactive Deductions in Progress - 'Calculate Status'	Lists retroactive deduction requests that have been processed.	**Payroll for North America**, and then **Retroactive Payroll**, and then **Reports**, and then **Retro Benefit/Deduction Rpts**, and then **Retro Ben/Ded Calculations**	RUNCTL_RTRODED1
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by emplID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the worker.	**Payroll for North America**, and then **Retroactive Payroll**, and then **Reports**, and then **Retro Benefit/Deduction Rpts**, and then **Retro Ben/Ded Load Summary**	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	**Payroll for North America**, and then **Retroactive Payroll**, and then **Reports**, and then **Retro Benefit/Deduction Rpts**, and then **Retro Benefit/Ded Load Audit**	RUNCTL_RTRODED3
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated workers. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	**Payroll for North America**, and then **Retroactive Payroll**, and then **Reports**, and then **Retro Benefit/Deduction Rpts**, and then **Retro Benefit/Ded Terminations**	RUNCTL_RTRODED3

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Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	**Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Reports**, and then **Department FTE**	RUNCTL_FRMTHRU_DPT
BUD004 Fiscal Year Budget	Produces a report that displays budget level definition for taxes, deductions, and earnings. Also reports the actuals to-date for the budget level, and the FTE (full-time equivalency) cap and maximum for the department. See PeopleSoft Human Resources Manage Commitment Accounting: Understanding Fiscal Year Budgets in PeopleSoft Human Resources.	• **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting USA**, and then **Fiscal Year Budget Report**, and then **Fiscal Year Budget Report** • **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting CAN**, and then **Fiscal Year Budget Report**, and then **Fiscal Year Budget Report**	RUNCTL_BUD004
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes	**Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Reports**, and then **Encumbrance Messages**	RUNCTL_BUD009

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Report ID and Report Name	Description	Navigation	Run Control Page
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or workers within a department. This report can also print information about a specific position or worker when you enter worker or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	• **Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Reports**, and then **Funding Summary Report CAN** • **Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Reports**, and then **Funding Summary Report USA**	RUNCTL_BUD011C RUNCTL_BUD011
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	**Set Up HCM**, and then **Product Related**, and then **Commitment Accounting**, and then **Reports**, and then **Full-Time Equivalent Rollup Report**	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	• **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting CAN**, and then **Retro Distribution Audit** • **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting USA**, and then **Retro Distribution Audit**	RUNCNTL_BUD020

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Report ID and Report Name	Description	Navigation	Run Control Page
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	• **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting CAN**, and then **Predistribution Audit Report** • **Payroll for North America**, and then **Payroll Distribution**, and then **Commitment Accounting USA**, and then **Predistribution Audit Report**	HP_RUNCTL_PDAUDIT
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	**Payroll for North America**, and then **Payroll Distribution**, and then **GL Interface Reports**, and then **Gross and Fringe**	HP_RCTL_GRSFR_RPT
PAY059 Encumbrance Accounting Line	Print details of encumbrance transactions that interface with PeopleSoft General Ledger or Commitment Control.	**Payroll**, and then **Payroll Distribution**, and then **GL Interface Reports**, and then **Encumbrance Accounting Line**, and then **Encumbrance Accounting Line Report**	RUN_PAY059
PAY061 Employee Budget Check Log	Print details of employee budget check logs.	**Payroll**, and then **Payroll Distribution**, and then **GL Interface Reports**, and then **Employee Budget Check Log**, and then **Employee Budget Check Log**	RUN_PAY061
PAY062 Position Budget Check Log	Print details of position budget check logs.	**Payroll**, and then **Payroll Distribution**, and then **GL Interface Reports**, and then **Position Budget Check Log**, and then **Position Budget Check Log**	RUN_PAY062

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Report ID and Report Name	Description	Navigation	Run Control Page
PAY063 Budget Check Error	Create a report listing Document IDs that do not have a valid budget check status.	**Payroll**, and then **Payroll Distribution**, and then **GL Interface Reports**, and then **Budget Check Error**, and then **Budget Check Error**	RUN_PAY063

Manage French Profit Sharing Reports

Report ID and Report Name	Description	Navigation	Run Control Page
WP0001FR Individual Report	Provides workers with details of their profit sharing amount when these are calculated, or when a worker leaves the organization. This report can be delivered with the worker's payslip.	**Compensation**, and then **Profit-Sharing FRA**, and then **Manage Profit Sharing**, and then **Individual Report**	RUNCTL_WP_IND_RPT
WP0002FR Agreement Report	This report is for administrators and lists all the workers that are eligible for a selected agreement and includes the status of the workers' funds, gross and net profit sharing amount, deductions, and investment method.	**Compensation**, and then **Profit-Sharing FRA**, and then **Manage Profit Sharing**, and then **Agreement Report**	RUNCTL_WP_AGRT_RPT

Manage French Public Sector Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FP_PROM Promotable Employees	Lists the workers promotable by a given date. To be launched after the FPA800 SQR. (BI Publisher)	**Workforce Administration**, and then **Collective Processes**, and then **Identify Promotable Empls FPS**, and then **Promotable Employees Report**	RUNCTL_FPAPROM

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Report ID and Report Name	Description	Navigation	Run Control Page
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	**Workforce Administration**, and then **Collective Processes**, and then **Manage Advancement FPS**, and then **Career Simulation Report**	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists workers that have been evaluated and those who have not.	**Workforce Development**, and then **Career Planning**, and then **Prepare Evaluation/Career Plan**, and then **Review Evaluation Status FPS**	RUNCTL_FPA025
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	**Workforce Development**, and then **Career Planning**, and then **Prepare Evaluation/Career Plan**, and then **Calc Adjustment Constant FPS**	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	**Workforce Administration**, and then **Workforce Reports**, and then **Individual Orders Edit FPS**	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	**Workforce Administration**, and then **Workforce Reports**, and then **Collective Orders FPS**	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	**Workforce Administration**, and then **Workforce Reports**, and then **Collective Order Updates FPS**	RUNCTL_FPA115
FPA400 Part-Time Schedule	Lists part-time workers, whose part-time will end soon	**Workforce Administration**, and then **Workforce Reports**, and then **Part-Time Schedule FPS**	RUNCTL_FROMTHRU
FPA405 Current PPd Schedule	Lists workers nearing the end of their probation period.	**Workforce Administration**, and then **Collective Processes**, and then **Identify Promotable Empls FPS**, and then **Current Probation Schedule Rpt**	RUNCTL_FROMTHRU

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Report ID and Report Name	Description	Navigation	Run Control Page
FPA-AFFE Assignment – Request tbc	Lists requests for assignment changes that need to be approved	**Workforce Administration**, and then **Workforce Reports**, and then **Assignment – Request tbc FPS**	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	**Workforce Administration**, and then **Workforce Reports**, and then **Career – Request tbc FPS**	RUNCTL_FPACRYSTAL1
FPACNTR Contribution Call Letters	Contribution call letters contain the worker's address and the contribution amounts. Launch this report after FPA1100 SQR.	**Workforce Administration**, and then **Collective Processes**, and then **Contribution Call Letter FPS**	RUNCTL_FPA1150
FPACNTR2 Contribution Call Letters	See above.	**Workforce Administration**, and then **Collective Processes**, and then **Contribution Call Letter FPS**	RUNCTL_FPA1150
FPAEE_CA Employee Career/ Action	Lists worker career data. (BI Publisher)	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **Employee Career/Action FPS**	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists worker civil service position data. (BI Publisher)	**Workforce Administration**, and then **Job Information**, and then **Reports**, and then **CS Position/ Employee FPS**	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment – Request Rejected	Lists rejected assignment change requests.	**Workforce Administration**, and then **Workforce Reports**, and then **Assignment – Rqst Rejected FPS**	RUNCTL_FPACRYSTAL1
FPAHISTC Career – Request Rejected	Lists rejected career change requests.	**Workforce Administration**, and then **Workforce Reports**, and then **Career – Request Rejected FPS**	RUNCTL_FPACRYSTAL1

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Report ID and Report Name	Description	Navigation	Run Control Page
FPAHISTP CSPosition – Request Rejected	Lists rejected civil service position requests.	**Workforce Administration**, and then **Workforce Reports**, and then **CSPosition – Rqst Reject FPS**	RUNCTL_FPACRYSTAL1
FPAHISTS Compensation – Request Rejected	Lists rejected compensation change requests.	**Workforce Administration**, and then **Workforce Reports**, and then **Compensation – Rqst Reject FPS**	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time – Request Rejected	Lists rejected work time change requests.	**Workforce Administration**, and then **Workforce Reports**, and then **Work Time – Rqst Rejected FPS**	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists civil service change requests requiring approval.	**Workforce Administration**, and then **Workforce Reports**, and then **CS Position Request tbc FPS**	RUNCTL_FPACRYSTAL1
FPA_RAT List of Employees to be Rated (employee ID)	Lists workers to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	**Workforce Development**, and then **Career Planning**, and then **Prepare Evaluation/Career Plan**, and then **Empl to be Rated Report FPS**	RUNCTL_FPA1210
FPARAT2 List of Employees to be Rated (employee/ department list)	See above.	**Workforce Development**, and then **Career Planning**, and then **Prepare Evaluation/Career Plan**, and then **Empl to be Rated Report FPS**	RUNCTL_FPA1210
FPA-REMU Compensation – Request tbc	Lists compensation change requests requiring approval.	**Workforce Administration**, and then **Workforce Reports**, and then **Compensation – Request tbc FPS**	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time – Request tbc	Lists work time change requests requiring approval.	**Workforce Administration**, and then **Workforce Reports**, and then **Work Time – Request tbc FPS**	RUNCTL_FPACRYSTAL1

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Report ID and Report Name	Description	Navigation	Run Control Page
FPMACT1 Action List – Report 1	Lists action definition part 1.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Action List – Report 1**	PRCSRUNCNTL
FPMACT2 Action List – Report 2	Lists action definition part 2.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Action List – Report 2**	PRCSRUNCNTL
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Actions/CS Position**	PRCSRUNCNTL
FPMACTPR Retro Prcs Action Rules	Lists the retroactivity rules for action codes.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Retro Prcs Action Rules**	PRCSRUNCNTL
FPMACTST Actions/Status	Lists actions authorized by status.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Actions/Status**	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Occupation**	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Corps**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FPMINDEX Index Value	Lists index/amount values.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Index Value**	PRCSRUNCNTL
FPMJOBCD Job Code	Lists job code definitions.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Job Code**	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Civil Service Position**	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Type of Point**	PRCSRUNCNTL
FPMRANK1 Grade List – Report 1	Lists grade definition part 1.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Grade List – Report 1**	PRCSRUNCNTL
FPMRANK2 Grade List – Report 2	List grade definition part 2.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Grade List – Report 2**	PRCSRUNCNTL
FPMSALST Sal Grade Table/Scale-Steps	Lists salary grade table – steps.	**Set Up HCM**, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Reports FPS**, and then **Sal Grade Table/ Scale-Steps**	PRCSRUNCNTL

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Manage Labor Administration Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR015 (USF) Union Membership	(For U.S. federal government users) Lists each union organization and the workers who are members. Before you run this report you must run the Refresh Employees Table process.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Union Membership USF**	PRCSRUNCNTL
HRLAY001 Layoff Roster	Report on the setup and roster list information of a layoff roster.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Layoff Roster Report**	HR_RUNCTL_LAY001
HRLAY002 Bumping	This report displays worker Job Data history and job hierarchy enabling you to determine who has bumping rights in the event of a layoff.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Bumping Report**	HR_RUNCTL_LAY002
HRLAY003 Seniority	Lists workers, their seniority dates, and the values for those dates.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Seniority Report**	HR_RUNCTL_LAY003
HRLAY004 Candidate List	This report lists the workers with recall rights that have not expired.	**Workforce Administration**, and then **Labor Administration**, and then **Candidate List Report**	HR_RUNCTL_LAY004
HRLAY005 Recall Roster	Report on the setup and roster list information of a recall roster.	**Workforce Administration**, and then **Labor Administration**, and then **Recall Roster**, and then **Recall Roster Report**	HR_RUNCTL_LAY005

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Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY006 Layoff Roster Post Processing	When you process a layoff from the Process Layoff page, the process generates this report, listing those workers laid off. **Note:** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page.	**Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Layoff Roster**, and then **Layoff Roster List** Click the Run Layoff Process button.	HR_RUNCTL_LAY
HRLAY007 Recall Rights Post Processing	• When you process a layoff from the Process Layoff page, the process generates this report, listing those workers who have received recall rights. **Note:** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page. • When you process a recall or reinstatement from the Recall/ Reinstatement page, the process generates this report, listing the recall rights of the workers who were rehired.	• **Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Layoff Roster**, and then **Layoff Roster List** Click the Run Layoff Process button. • **Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Recall Roster**, and then **Recall Candidate List** Click the Run Recall Process button. • **Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Reinstatement Roster**, and then **Reinstatement Candidate List** Click the Run Reinst Process button.	HR_RUNCTL_LAY HR_RUNCTL_REINSTAT

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Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY008 Recall Post Processing	When you process a recall or reinstatement from the Recall/ Reinstatement page, the process generates this report, listing those workers recalled or reinstated.	• **Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Recall Roster**, and then **Recall Candidate List** Click the Run Recall Process button. • **Workforce Administration**, and then **Labor Administration**, and then **Layoffs and Recalls**, and then **Reinstatement Roster**, and then **Reinstatement Candidate List** Click the Run Reinst Process button.	HR_RUNCTL_REINSTAT
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against workers within a specified date range. The report itemizes actions by date, by incident, and by worker. (BI Publisher)	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Worker Discipline Action**	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company. (BI Publisher)	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Grievance Detail**	RUNCTL_OHS_NONE
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific workers.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Employee Disciplinary Action**	RUNCTL_OHS005

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions. (BI Publisher)	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Employee Grievance Summary**	RUNCTL_OHS_FROMTO
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the workers who are members. Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Union Membership Report**	PRCSRUNCNTL
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more workers are required to submit this report.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Equal Opportunities ITA**	RUNCTL_PER053
PER059 Union Report ITA	(ITA) There are two Italian union reports. You can run a union report generating a list of workers and worker information by union. You can also run a union report listing the number of workers belonging to each union, sorted by category.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Union Report ITA**	RUNCTL_PER059
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	**Workforce Administration**, and then **Labor Administration**, and then **Reports**, and then **Labor Relations Letters**	RUNCTL_PER061
WP001 Employees Due Advancement	Create a list of all of the workers that the Process Wage Progression process will advance.	**Workforce Administration**, and then **Labor Administration**, and then **Wage Progression**, and then **Process Wage Progression**, and then **Process Wage Progression**	RUN_UPD_WP_ADVC

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Report ID and Report Name	Description	Navigation	Run Control Page
WP002 Exceptions	Lists all workers within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.	**Workforce Administration**, and then **Labor Administration**, and then **Wage Progression**, and then **Wage Progression Exception Rpt**, and then **Exceptions Report**	RUN_WP002

Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (BI Publisher)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Active/ Inactive Positions USF**	RUNCTL_FGHR025
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Incumbent History USF**	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Active Position History USF**	RUNCTL_FGASOFDT
FGHR028 (USF) Exception/ Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Exception Override USF**	RUNCTL_FGHR028

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Report ID and Report Name	Description	Navigation	Run Control Page
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (BI Publisher)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Occupation Series USF**	PRCSRUNCNTL
FGOF8 (USF) OF8 Report	This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Optional Form 8 USF**	RUNCTL_FGOF8
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (BI Publisher)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Federal Position Titles**	PRCSRUNCNTL
FGPER823 (USF) Job Code	Print a list of all the job codes with effective dates.	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Federal Job Codes**	PRCSRUNCNTL
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization.	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Vacant Position USF**	RUNCTL_FGHR010
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Position Status**	RUNCTL_ASOFDATE
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (BI Publisher)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Active and Inactive Positions**	RUNCTL_POS002

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Report ID and Report Name	Description	Navigation	Run Control Page
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Position Incumbent History**	RUNCTL_ASOFDT_COMP
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Active Position History**	RUNCTL_ASOFDATE
POS006 Create Organizational Report	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.	**Organizational Development**, and then **Position Management**, and then **Create Organizational Structure**, and then **Create Organizational Report**	RUNCTL_POS006
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Create Organizational Report. (SQR)	**Organizational Development**, and then **Position Management**, and then **Create Organizational Structure**, and then **Build Position Structure**	RUNCTL_ASOFDATE
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (BI Publisher, SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Vacant Position Report**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	**Organizational Development**, and then **Position Management**, and then **Position Reports**, and then **Position Exception/Override**	RUNCTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	**Workforce Monitoring**, and then **Professional Compliance**, and then **Reports**, and then **Company Compliance Report**	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	**Workforce Monitoring**, and then **Professional Compliance**, and then **Reports**, and then **RI Observation**	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	**Workforce Monitoring**, and then **Professional Compliance**, and then **Reports**, and then **RI Review Report**	RUN_CNTL_PCMP4

Manage Profiles Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMM007 Licenses, Certificates Renewal	Lists which workers need to renew a license or certificate.	**Workforce Development**, and then **Profile Management**, and then **Reports**, and then **Licenses/ Certificate Renewal**	RUNCTL_CMM007
JPM_CATI_RPT Content Catalog Listing	Lists the content items that have been set up for a selected content type or for all content types.	**Set Up HCM**, and then **Product Related**, and then **Profile Management**, and then **Content Catalog**, and then **Content Catalog Listing**	JPM_CATLIST_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
JPM_JPNP_RPT Non-Person Profile	Generate a PDF file for each non-person profile listed in the run parameters.	**Workforce Development**, and then **Profile Management**, and then **Reports**, and then **Non-Person Profile Report**	JPM_NPPROF_RPT
JPM_JPPP_RPT Person Profile	Generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters.	**Workforce Development**, and then **Profile Management**, and then **Reports**, and then **Person Profile Report**	JPM_PPROF_RPT
NVQ001 (GBR) UK NVQ - Employee Status	Lists workers assigned to an NVQ and their status. (BI Publisher)	**Workforce Development**, and then **Profile Management**, and then **NVQ Reports UK**, and then **Employee Status**	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units. (BI Publisher)	**Workforce Development**, and then **Profile Management**, and then **NVQ Reports UK**, and then **Unit Listing**	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units. (BI Publisher)	**Workforce Development**, and then **Profile Management**, and then **NVQ Reports UK**, and then **NVQ Listing**	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ – Unit/ Element Listing	Lists the elements associated with NVQ units. (BI Publisher)	**Workforce Development**, and then **Profile Management**, and then **NVQ Reports UK**, and then **Unit/ Element**	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes a worker's NVQ Unit plan. First run the NVQ - Initialize Plan process to generate this report. (BI Publisher)	**Workforce Development**, and then **Profile Management**, and then **NVQ Reports UK**, and then **Employee Plan**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER011 Competency Inventory	Lists workers in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new workers and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.	**Workforce Development**, and then **Profile Management**, and then **Reports**, and then **Competency Inventory**	RUNCTL_PER011
PER034 Internal Resume	Creates a resume-like document from the data contained in the employee's PERSON profile and other information. Sections of the report include: name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards	**Workforce Development**, and then **Profile Management**, and then **Reports**, and then **Internal Resume**	RUNCTL_PER034

Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Actual Awards**	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Budget**	RUNCTL_VC_REP
VC003 Calculate Awards Report	View the results of the Award Calculation process.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Calculate Awards**	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances. The detailed report lists all workers in a plan by group and their carryover balances. The summary report lists the total carryover balance for each group, as well as the totals for the plan.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Carryovers**	RUNCTL_VC_REP
VC005 Employee History Report	For each worker, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each worker's grand total values for all plans.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Employee History**	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Funds Allocation**	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC007 Guarantee Report	View the worker guarantees. The detailed report lists all workers in a plan by group and their guarantees. The summary report lists the total guarantees for each group, as well as the totals for the plan.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Guarantee**	RUNCTL_VC_REP
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to workers. The report lists only awards that are beyond the status of Initial Calculation. The detailed report lists all workers in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value. The summary report lists the total non-monetary units for each group, as well as the totals for the plan.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Non Monetary**	RUNCTL_VC_REP
VC009 Plan History Report	The report provides information about the plan definition and lists award values, proration, and approver information by payout period for the plan ID that you specify on the run control page.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Plan History**	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page. The detailed report lists all workers in a plan by group, the worker's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan. The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Variance**	RUNCTL_VC_REP
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Organization and Group Goals**	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of workers who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the workers' managers can use this information to ensure that these individuals get the appropriate awards.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Tree Consistency Report**	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Payroll for North America or PeopleSoft Stock Administration.	**Compensation**, and then **Variable Compensation**, and then **Award Reports**, and then **Subscription Errors**	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies workers who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	**Compensation**, and then **Variable Compensation**, and then **Variable Comp Reports**, and then **Tree Member Overlap**	RUNCTL_VCP001

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females. This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Adverse Impact (USA)**	RUN_CNTL_REG
HRS002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Job Group Movement Analysis**	RUN_CNTL_REG
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **OSHA-200 Log**	RUNCTL_CALENDARYR

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Report ID and Report Name	Description	Navigation	Run Control Page
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations. This report is compliant with the EEOC requirements for single and multi-establishment reporting. A single-establishment employer needs to file one report, while a multi-establishment employer must file separate reports.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO-1 Employer Info**	RUNCTL_PER016
HR_PER016_AE EEO-1 Component 2 (EEO-1 Compensation Data)	Collects summary employee hours worked and pay information from their W-2 forms by job category, race, ethnicity and sex.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO-1 Compensation Data** , and then **EEO-1 Compensation Data**	HR_EEO1_RUNCNTRL
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of worker counts for the private sector.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO-1 Job Analysis Report**	RUNCTL_PER017
PER019 Terminations Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group. It counts workers in each group, counts terminations, and expresses both counts as a percentage of the total population of active workers. It also calculates the termination rate. This report does not include workers whose Sex or Ethnic Group has not been indicated.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Terminations Analysis Report**	RUN_CNTL_REG

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Report ID and Report Name	Description	Navigation	Run Control Page
PER022 EE0-5 Job Analysis	Supplies standard job category counts for school-related categories.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO-5 Job Analysis**	RUNCTL_PER022
PER024 Job Group Analysis	Analyzes the makeup of your workforce by establishment, EEO job group, job title, and salary grade. For a given job title and salary grade, the report provides totals by minorities, by gender, and by ethnicity within gender. Use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Job Group Analysis**	RUN_CNTL_REG2
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce by job groups within each establishment. These totals are further broken down by minority and gender, and then by ethnicity within each gender.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Job Group Summary Report**	RUN_CNTL_REG2
PER025 Workforce Analysis	Tracks hiring practices by department based on job titles, including the salary grade assigned to the title and the total number of workers and minorities who hold the title. Use the report to analyze patterns of discrimination in hiring practices. The report shows the percentage of minorities in each department.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Workforce Analysis for Reports**	RUN_CNTL_REG2

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Report ID and Report Name	Description	Navigation	Run Control Page
PER027 VETS Process	Extracts and loads establishment and veterans employment data into a temporary table to be used by the VETS Analysis and VETS Submit processes. Run the VETS-4212 report beginning with the 2015 filling cycle. Run VETS-100A or VETS-100 reports *only* for internal use. They are no longer accepted by the Department of Labor.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **VETS Reports**, and then **Veterans Employment Report**	RUNCTL_PER027
PER027B VETS Analysis	Reports the number of disabled veterans, armed forces service medal veterans, and other protected veterans in your workforce by job category and hiring location, as well as the same number breakdown for employees that were hired during the reporting period. You must run the VETS process (PER027) before running this report.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **VETS Reports**, and then **Veterans Employment Analysis**	RUNCTL_PER027C
PER027C Vets Submit	Creates a digital text file (using the data collected in the VETS process) to be submitted to the government. You must run the VETS process (PER027) before running this report.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **VETS Reports**, and then **Veterans Employment Submission**	RUNCTL_PER027C

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Report ID and Report Name	Description	Navigation	Run Control Page
PER030 Job Group Roster	Lists personal and job data for workers such as ethnic group, gender, date they received the title, salary grade, hourly rate, monthly rate, department name, original hire date and job title at hire. Workers are grouped by their associated job group and establishment.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **Job Group Roster for Reports**	RUN_CNTL_REG2
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO-4 State/Local Government**	RUNCTL_PER031
HR_RFWPRW_AE PRWORA - New Hire Report	Provides the criteria necessary to create the electronic report, along with a standard state (or Federal) flat file containing the information employers furnish to the State Directory of New Hires after hiring new workers (PRWORA New Hire Report). This report is generated as an Adobe (PDF) file.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **PRWORA New Hire Report**	RUN_RFWPRW_HR
PER040 IPEDS-S	The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **IPEDS-S Report**	RUNCTL_PER040

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements

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(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ANZSCO	Prints a list of the ANZSCO reporting codes.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts AUS**, and then **ASCO Report**	PRCSRUNCNTL

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Maintaining the ASCO Table
- PeopleSoft Human Resources Meet Regulatory Requirements: Creating Reports for the PSMPC

(BRA) Meeting Regulatory Requirements Reports for Brazil

Report ID and Report Name	Description	Navigation	Run Control Page
BRCGED01 CAGED Report	The CAGED (Cadastro Geral de Empregados e Desempregados) report generates a file containing the monthly turnover of workers by establishment. Every establishment that has had any type of turnover (hiring, dismissing, or transferring worker that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts BRA**, and then **CAGED File/Report BRA**	CAGED_RC_BRA
BREREG01 Employee Registry	The Employee Registry report generates a file containing workers' employment data, including hire date, retirement date, length of social security contributions.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts BRA**, and then **Employee Registry Report BRA**	EMPL_REG_RC_BRA

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(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	Description	Navigation	Run Control Page
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts CAN**, and then **Reports**, and then **Employment Equity**	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts CAN**, and then **Reports**, and then **Official Language Requirements**	RUNCNTL_PER102CN
PER715CN Pay Equity Table	Lists job evaluation information. (BI Publisher)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts CAN**, and then **Reports**, and then **Pay Equity**	PRCSRUNCNTL
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (BI Publisher, SQR)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts CAN**, and then **Reports**, and then **National Occupation Codes**	PRCSRUNCNTL

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding Regulatory Requirements for Canada

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(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	Description	Navigation	Run Control Page
DIS001 Disability	Calculate the theoretical number of disabled workers who should work for the company and list the disabled workers, excluding temporary workers, trainees, and apprentices. For companies with more than 20 workers. (SQR) Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **Disability**	RUNCTL_DIS001_FRA
ELE001 Election	Provides the results of the staff representative elections for workers and management. (BI Publisher)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Election Monitoring**, and then **Election Report**	RUNCTL_ELE001
HRSHSFRA Single Hiring Statement	A statutory report that is filed at the time of hiring new workers. The system uses information from your worker, company, and establishment tables to generate the report. (BI Publisher)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **Single Hiring Statement**	SHS_FRA_RUN_CTL
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more workers. (SQR) Before running this report, define which contract types to include in the report using the Contract Type Group page.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **Monthly Workforce**	RUNCTL_REG001_FRA

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Report ID and Report Name	Description	Navigation	Run Control Page
REG002FR Personal Register	Lists workers for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **Personal Register**	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **Workforce by Nationality**	RUNCTL_REG003_FRA
REG004FR BIAF report	This statutory report is for workers on fixed-term contracts and details the worker's training entitlement.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Required Reports**, and then **BIAF**	RUNCTL_BIAF_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of workers in the organization and their average salary. (BI Publisher) Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey – Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts FRA**, and then **Employee Survey**, and then **Employee Survey Report**	RUNCTL_SOC001

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding French Regulatory Requirements

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(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **Adverse Impact**	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current worker count and the number of terminations.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **Termination Analysis**	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **Workforce Analysis**	RUNCTL_PER025UK
PER030UK Job Group Roster	Lists your workers in job groups.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **Job Group Roster**	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **Joint Staffing**	RUNCTL_ASOFDATE
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts UK**, and then **Reports**, and then **NI Fair Employments**	RUNCTL_UKNI

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding U.K. Regulatory Requirements

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(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO Groups by PATCOB/POI USF**	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO Grps by PATCOB/Sub-Agency**	RUNCTL_FGHR012
FGHR013A VETS-100 by Sub Agency	Generates a Veterans employment report by sub-agency.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **VETS Reports**, and then **VETS-100 by Sub-Agency USF**	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **VETS Reports**, and then **VETS-100 by POI USF**	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO Groups by Series/POI USF**	RUNCTL_FGHR014
FGHR014B EEO Groups by Series/ SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **EEO Reports**, and then **EEO Groups by Series/ Agency**	RUNCTL_FGHR014

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Report ID and Report Name	Description	Navigation	Run Control Page
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing. Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDFF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **CPDF Processing USF**, and then **Error Report**	RUNCTL_FGHR019B
FGPY015 New Hire USF - New Hires Extract	Provides a report containing the Federal new hires.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **New Hire Report USF**	GVT_RUN_NH_EXTRACT
FGPY016 New Hire Error USF - New Hires Import	Creates a report containing Federal new hire errors.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **New Hire Error USF**	GVT_RUN_NH_ERROR
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **SF113-A Report USF**	RUN_FGSF113A
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **SF113-G Report USF**	RUN_FGSF113G

Related Topics

- PeopleSoft Human Resources Meet Regulatory Requirements: Understanding Regulatory Requirements for U.S. Federal Agencies

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Monitor Absence Reports

Report ID and Report Name	Description	Navigation	Run Control Page
ABS001 Absence Listing	Provides information about a worker's absence history. **Note:** Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Absence Listing**	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of worker absence periods.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Absence Periods**	RUNCTL_FROMTHRU
ABS003 Time Lost Due to Absence	Provides worker absence information. **Note:** Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Time Lost Due to Absence**	RUNCTL_ABS003
ABS004UK Bradford Score	Lists worker absences for the regulatory region of GBR only. It lists department, name, emplID, worker type, job title, total number of absences, total number of days absent, and the Bradford Score. The Bradford Score column of this report is calculated based on the following information: • Total number of absences (A) • Total number of days absent (B) • A^2 X B **Note:** Run the Refresh Employees Table process before running this report.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Bradford Score GBR**	RUNCTL_ABS004UK
ABS005NL Illness Registration (1)	Calculates the illness totals, percentages, and frequencies.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Illness Registration NLD**	RUNCTL_ABS005_NL

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Report ID and Report Name	Description	Navigation	Run Control Page
ABS006NL Illness Registration (2)	Same as above.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Illness Registration NLD**	RUNCTL_ABS005_NL
ABS007NL Longterm Illnesses NLD	Provides a report of workers who have longterm illnesses from which they haven't fully recovered and are subject to the Dutch law Wet Poortwachter. You can use a worker checklist to track the status of a worker's illness. **Note:** This report can be run from PeopleSoft Human Resources or Global Payroll for the Netherlands. Based on the setting of the GPNLD installation flag, the report retrieves absence data from human resources or payroll tables.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Long-term Illness NLD**	RUNCTL_ABS007_NL
ABS702NL Create Statistics	Create absence statistics for a company in the Netherlands.Run this process before creating an Illness Registration report. Run for a certain month of the year.	**Workforce Administration**, and then **Absence and Vacation**, and then **Absence Reports**, and then **Create Illness Statistics**, and then **Create Statistics**	RUNCTL_ABS702_NL

Monitor Health and Safety Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BRCAT01 CAT Report Brazil	Monitor work risks by establishment ID, department ID, employee, and incident ID.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **CAT Report BRA**	CATRC_INCIDENT_BRA

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Report ID and Report Name	Description	Navigation	Run Control Page
BRPPP01 PPP Report BRA	Add profile information to the system by establishment ID, department ID, group ID, or worker.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **PPP Report BRA**	PPP_RC_BRA
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **WCB Form 7 CAN**	RUNCTL_OHS001CN
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Work Accident FRA**	OHS001FR
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Accident DEU**	RUNCTL_OHS501GR

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS001UK Injury/Dangerous Occurrence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (BI Publisher) Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a BI Publisher report that exactly duplicates the official report. **Note:** To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Injury/ Dangerous Occ. GBR**	RUNCTL_OHS_UK
OHS002GR Reportable Accident/ Illness	Produces a Reportable Accident /Illness report for Germany.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Reportable Accident/Illness DEU**	RUNCTL_OHS002GR

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (BI Publisher) Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a BI Publisher report that exactly duplicates the official report. Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Illness GBR**	RUNCTL_OHS_UK
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Non-Employees Health Incidents**	RUNCTL_OHS_FROMTO
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Incident Location Summ DEU**	RUNCTL_OHS003GR

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. This report is only available in German. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Illness DEU**	RUNCTL_OHS504GR
OHS008BC Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **WCB Incident CAN**	RUNCTL_OHS_INC
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Health Incident Summary Data**	RUNCTL_OHS_FROMTO

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Personnel Location Incident**	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Claim Summary Overview**	RUNCTL_OHS_FROMTO
OHS013 Employees In Incidents	Summarizes workers involved in incidents that have occurred within a specified date range. It notes whether the worker has suffered an injury or illness. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Employee Health Incidents**	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for a worker involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Health Incident Lost Work**	RUNCTL_OHS_FROMTO

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the worker filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Health Incident Claim Report**	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (BI Publisher)	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Vehicle Incident Summary**	RUNCTL_OHS_FROMTO
OHS017A Injury and Illness Incident Report	Creates OSHA-301 incident reports from incidences that have been specified as being OSHA reportable. The OSHA-301 data is kept distinct from your incident data, but uses the incident data as a starting point. This allows you to tailor the data in your OSHA-301 report to make sure it meets OSHA requirements without having to make changes to the original incident data.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **OSHA 301 Incident Report Print**	RUN_CNTL_OSHA_REG2

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS018B OSHA 300 Incident Log	Generates the OSHA 300 log, which is calculated from Incident and Injury data stored in your system, and not from the data entered in the OSHA-301 report. The report includes all incidents that resulted in injuries specified as OSHA reportable.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **OSHA 300 Incident Log**	RUN_CNTL_OSHA_REG1
OHS019B OSHA 300A Annual Summary	Generates the OSHA 300A Summary report, which provides an overview of the data contained in the OSHA-300 Incident Log. The values in this summary are determined using the same algorithms and the same source data as the OSHA-300 report. A PDF report is generated separately for each establishment. You can also generate a single consolidated csv file to support electronic filing. The file content is based on the filter criteria selected on the run control page.	**Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Regulatory Reports**, and then **OSHA 300A Annual Summary**	RUN_CNTL_OSHA_REG1
PER002CH Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	**Workforce Monitoring**, and then **Health and Safety**, and then **Reports**, and then **Accident CHE**	RUNCTL_PER002_CHE

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Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARTRAIN Employee Career Training Plan	Lists a worker's training plan to meet career goals (BI Publisher).	**Workforce Development**, and then **Career Planning**, and then **Career Reports**, and then **Employee Career Training**	RUNCTL_CAR002
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for a worker. (SQR). An IDP includes a worker profile, worker competencies, worker training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.	**Workforce Development**, and then **Career Planning**, and then **Career Reports**, and then **Individual Development Plan**, and then **IDP**	RUN_FGHR022

Manage Base Compensation and Budgets Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Salary Structure**	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment. The report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Job Grading by Evaluation Pts**	RUNCTL_ASOFDATE
CMP003 Compa-Ratio Analysis	The report lists each worker in the salary grade and the midpoint amount of the salaries in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.* The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the worker's salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Ratio Analysis**	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP004 Below Minimum Analysis	The Below Minimum Analysis report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Below Minimum Analysis**	RUNCTL_ASOFDATE
CMP005 Above Maximum Analysis	For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Above Maximum Analysis**	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the workers' previous and new compensation package. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.	**Compensation**, and then **Base Compensation**, and then **Maintain Plans**, and then **Update By Plan/Paygroup**	RUNCTL_CMP008

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to workers' job records before you run the Load Data process (HR_SP_CI) to actually insert new job records. This report displays the workers' previous and new Sal Admin Plan (salary administration plan), Grade, and Step. Generate this report after running the Update by Job Code application engine process. The report displays the workers' previous and new salary administration plan, grade, and step. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Job Code process run control page.	**Compensation**, and then **Base Compensation**, and then **Maintain Plans**, and then **Update by Job Code**	RUNCTL_CMP010
CMP011 Salary History by Employee	Displays each salary change for a worker during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	**Compensation**, and then **Base Compensation**, and then **Compensation Reports**, and then **Salary History by Employee**	RUNCTL_CMP011

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP014 Salary History by Group	Provides the salary changes for the workers in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	**Compensation**, and then **Base Compensation**, and then **Compensation Reports**, and then **Salary History by Group**	RUNCTL_CMP014
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	**Compensation**, and then **Base Compensation**, and then **Percentage Increase JPN**, and then **Salary Simulation Report**	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	**Compensation**, and then **Forecast Compensation FRA**, and then **Process Forecast**, and then **Forecasted Compensation Rpt**	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	**Compensation**, and then **Forecast Compensation FRA**, and then **Process Forecast**, and then **Scenario Comparison Rpt**	RUNCTL_LMS_REPORT
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them. The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of a worker have an associated rate code class. Run this report before you run the calculation process.	**Compensation**, and then **Forecast Compensation FRA**, and then **Process Forecast**, and then **Rate Codes w/out Class Rpt**	RUNCTL_LMS_RATE_CL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER008 Review Audit	Lists all worker reviews for the workers in a group.	**Compensation**, and then **Base Compensation**, and then **Employee Review History**, and then **Review Audit**	RUNCTL_PER008
PER012 Departmental Salaries	This report provides an alphabetical list of workers by department, basic job data information, and a breakdown of pay rates for each.	**Compensation**, and then **Base Compensation**, and then **Compensation Reports**, and then **Salary History by Department**	PRCSRUNCTL_LC_HR
PER013 Employee Compensation Changes	Lists workers who have had compensation rate changes within a selected time period.	**Compensation**, and then **Base Compensation**, and then **Compensation Reports**, and then **Employee Compensation Changes**	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for a worker during a specified time period.	**Compensation**, and then **Base Compensation**, and then **Compensation Reports**, and then **Salary History by Company**	RUNCTL_PER023
PER041 Merit Increase Report	Lists the merit increases and their approval status for the workers in a merit group.	**Compensation**, and then **Base Compensation**, and then **Merit Increases**, and then **Report Merit Increases**	RUNCTL_SP_MERIT
PER062JP (JPN) Grade Advance Candidate List	Lists workers who are eligible to advance from the grade you enter.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Grade Advance Candidates JPN**	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Salary Grade**	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	**Compensation**, and then **Base Compensation**, and then **Salary Plan Reports**, and then **Salary Grade/Step**	RUNCTL_PER706B

Performance Management Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Lists missing documents for a group of workers (Group ID) and a given document type and date range.	**Workforce Development**, and then **Performance Management**, and then **Reports**, and then **Missing Documents Report**	RUNCTL_EP_RPT
HEP002 Late Documents	Lists manager documents whose due date has passed.	**Workforce Development**, and then **Performance Management**, and then **Reports**, and then **Late Documents Report**	RUNCTL_EP_RPT

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to workers.	**Compensation**, and then **Total Compensation**, and then **View Total Compensation**, and then **Total Comp Statement Report**	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	**Compensation**, and then **Total Compensation**, and then **View Total Compensation**, and then **Group Summary Compensation Rpt**	TC_GRP_RUN_CNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	**Compensation**, and then **Total Compensation**, and then **View Total Compensation**, and then **Group Detail Compensation Rpt**	TC_GRP_RUN_CNTL

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	**Workforce Development**, and then **Faculty Events**, and then **Load Teaching Data CAN**, and then **FT Survey Stats CAN Rpt**	RUNCTL_HPH905CN
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	**Workforce Development**, and then **Faculty Events**, and then **Track Events**, and then **Faculty Events Hist Rpt**, and then **Faculty Events Report**	RUNCTL_EVENTS
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	**Workforce Development**, and then **Faculty Events**, and then **Manage Cases**, and then **Case Review Status Report**, and then **Case Review Status Report**	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	**Workforce Development**, and then **Faculty Events**, and then **Tenure Reports**, and then **Employee Tenure Status**	RUNCTL_EGPP03

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Report ID and Report Name	Description	Navigation	Run Control Page
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group. Administer Flexible Service also uses this report.	**Workforce Development**, and then **Faculty Events**, and then **Tenure Reports**, and then **Faculty Tenure Calculation**, and then **Faculty Tenure Calculation**	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date. With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.	**Workforce Development**, and then **Faculty Events**, and then **Tenure Reports**, and then **Faculty Service Tenure**, and then **Faculty Service Tenure**	RUNCTL_EGPP06

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	**Workforce Administration**, and then **Flexible Service EG**, and then **Employee Service Report**	RUNCTL_EGPP04

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Report ID and Report Name	Description	Navigation	Run Control Page
PER049 Employee Service Calculation Results	Lists the results of the Normal Run background process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	**Workforce Administration**, and then **Flexible Service EG**, and then **Calculated Service Report**	RUNCTL_EGPP05

Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (BI Publisher)	**Workforce Administration**, and then **Global Assignments**, and then **Track Assignment**, and then **Employees on Assignment Report**	RUNCTL_PER717

PeopleSoft HCM Reports: Selected Reports

This topic provides detailed information on individual reports. The reports are listed by report ID.

PER044 - Seniority Components Report − Basic Report

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.
- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.
- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

Related Topics

- PeopleSoft Human Resources Administer Compensation: Understanding the Update Seniority Pay Process

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PER033 - Citizenship/Country/Visa Audit − Administer Workforce

The report flags six different types of discrepancies. Specifically, it flags job records when the following pairs of data exist:

Field or Control	Description
Citizenship Status	• Native or Naturalized. • Not Native or Naturalized.
Country of Citizenship	• Not the local country. • The local country.
Visa Record	• Exists for the local country. • Doesn't exist for the local country.

The report puts a page break between categories.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Managing Citizenship and Visa or Permit Information

PER058 - Primary Job Audit − Administer Workforce

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for a worker's primary job only, you create an accurate worker count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have workers who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your worker job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for workers with multiple jobs.

This report lists all workers whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.
- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Running Job Data Reports

PER066JP - JPN Employee Assignment List Report

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 then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.

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- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Workers without supervisor levels, in alphanumeric emplID 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 the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

POS006A - Build Position Structure − Manage Positions

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.
- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

Related Topics

- PeopleSoft Human Resources Manage Positions: Running the Organizational Structure Reports

POS008 - Exception/Override − Manage Positions

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the worker assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

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Related Topics

- PeopleSoft Human Resources Manage Positions: Verifying Position Data

PKG006 - Salary Packaging FBT Reconciliation − Administer Salary Packaging

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the workers who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each worker and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

> **Note**
>
> The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

Related Topics

- PeopleSoft Human Resources Administer Salary Packaging: Running Salary Packaging Reports

HRH905CN - StatsCan FT Survey − Track Faculty Events

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada's summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

VC011 − Organization and Group Goals − Manage Variable Compensation

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

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This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.
- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

Related Topics

- PeopleSoft Human Resources Manage Variable Compensation: Running the Organization and Group Goals Report

VC013 − Subscription Error − Manage Variable Compensation

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award, the report identifies the worker, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)
- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Request by User (Reject All)

Related Topics

- PeopleSoft Human Resources Manage Variable Compensation: Reporting on Award Payout and Distribution

BEN004 - Savings Investment Distributions − Base Benefits

This report lists the total deductions made to date and the total company contributions for workers participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for workers in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

BEN733 - Base Benefit Audit − Base Benefits

The Base Benefits Audit Report provides a summary of potential worker data issues as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

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The audits performed are Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage, Employees with incorrect health plans set up on the Benefit Program Table, and audits for consistency of marital and dependent relationships.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

CBR005 - COBRA Event Report − Base Benefits

This report provides data about COBRA beneficiaries at the Event Level. The report will list all workers to whom an event has occurred. The qualified status indicates whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

CBR007 - COBRA Audit − Base Benefits

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and workers who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

CBR008 - COBRA Administration Error − Base Benefits

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

NDT004 - 401(k)/401(m) Nondiscrimination Testing − Base Benefits

Specify 401(k) or 401(m) for the report output.

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If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001:* This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002:* You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003:* This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

Related Topics

- PeopleSoft Human Resources Manage Base Benefits

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